# CJK Associates: Services for Multi Academy Trusts and school groups

## At a glance

Our mission in working with Multi Academy Trusts and other school groups is to help them on the next step of their development journey; always reflecting the Trust’s particular culture and values.

### Our service include:

* **Strategy review:** Help your Trust to align your vision and make specific decisions about the sort of Trust you aspire to be, including decisions about standardisation, centralisation or school level autonomy in each area of operational and educational activity.
* **Operating Model review**: Assessing your culture, organisation, governance, systems, people, processes and performance, with detailed benchmarks
* **Operating Model redesign**: setting out costed and evaluated options for the future organisation, governance, systems, processes and skills, and the steps to implement them.
* **Executive coaching and mentoring for CEOs/ COOs**: bespoke one to one programmes based on your needs, including NPEQL project mentoring
* **Trust Research Panel:** CJK Associates provides advice to government, school groups, education services and investors. Our panel of Trust leaders provides us with vital, up to date insight about trends in the Academy sector. We reward participation though Amazon vouchers for you or your schools. You can register here: <https://www.cjkassociates.co/register>

### Prices:

* Strategy Review, Operating Model review and Operating Model redesign bundle: £10,500-40,000 depending on size
* Executive coaching: based on requirements
* Tailored consultancy: based on requirements
* ***CST Member discount: 10%***

## About us

CJK Associates was founded in 2016 by **Chris Kirk**. Chris has worked extensively with Trusts and other school groups around the country. Chris is a frequent keynote speaker at education events. He has been a member of two of OFSTED’s Advisory Panels. He is part of Ambition Institute’s NPQEL faculty, where he provides Executive Education for individuals in CEO roles in Trusts, with an emphasis on the operational and business-related aspects of running a Trust. Chris is a former PwC Education Partner & Strategy Partner.  Chris spent four years as a CEO within an international school group, with responsibility for a chain of 15 public and private schools and colleges in UK and Europe. Chris began his career as a fast stream civil servant.

Our credibility with our Trust clients comes from a range of sources:

* Endorsement from our Trust clients who we have supported with vision, strategy, and operating models (e.g. Astrea, Woodard, Summit, CHAT, Arbib Education Trust, Langley Park, Ormiston, David Ross Education Trust, Reach2, Solent, Spencer)
* Our research, with Ambition Institute and LKMCo, ‘[Building Trusts](https://www.ambition.org.uk/research-and-insight/building-trusts/)’ - with over 60 Trusts
* We provided extensive material for ‘[The Key for Trust Leaders](https://thekeysupport.com/insights/2019/09/26/the-role-of-trusts-in-staff-retention-and-development-chris-kirk-multi-academy-trust-consultant-cjk-associates/)’ including the whole of the ‘Reviewing your operating model’ and ‘Centralising Services’ sites. These resources are used by Trusts across England to support operating model reviews.

“What I really liked about CJK Associates was the mix of rigour, candour and energy. They helped us clarify our aims and how to get there. Some of the priorities we identified as a result of the independent input were quite different from the ones we had in mind before we started.”   
CEO, David Ross Education Trust

“We have been very pleased with both the manner in which the work was carried out and the output from the review. The review highlighted many issues that we were aware of, and it also threw light on some new areas for further focus. The trustees approved the recommendations of the report. We would certainly have no hesitation in recommending CJK associates to others.” Chair, Dartmoor Multi Academy Trust

“The review was robust and challenging. It was like a good ‘Big 4’ consulting experience but at a fraction of the cost.   
Chair, Spencer Academy Trust

“We would like to express our gratitude and appreciation for such a comprehensive report. I am really pleased with the quality and depth.”   
National Education Director, Ormiston Academies Trust

### Meet the team

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| --- | --- | --- |
|  | Chris Kirk   * CV: PwC Strategy Partner, CEO in GEMS Education group, National College for School Leadership, UK Department for Education * Expertise: Strategy, leadership and management of international teams, political and organisational change, stakeholder engagement, negotiation, acquisitions and disposals. | |
| A person smiling for the camera  Description automatically generated | Louise Reader   * CV: 12 years in a senior consultancy role at PwC * Expertise: Operational efficiency driving continuous improvement through line management, consultancy and governing board membership |
| A person in a red shirt  Description automatically generated | Cate Noble   * CV: Director of Better Purpose, CEO of the Varkey Foundation, PwC Director, Education Development Trust * Expertise: Strategy and transformation in the education, public and not-for-profit sectors, international markets encompassing the Middle East, Europe, South East Asia and Africa. |
|  | Nick Finnemore   * CV: 18 years experience with a leading education technology supplier * Expertise: Education technology products and systems, product management, training and development of Product Management teams |
| A person posing for the camera  Description automatically generated | Andrea Carr   * CV: Founder and former CEO of ‘Rising Stars’, a leading assessment and content business for schools * Expertise: Education technology and content business development, organisation management, sector partnerships business growth and exits. |
| A person lying on a bed  Description automatically generated | Sarah Finnemore   * CV: Capita SIMS, Pupil Asset * Expertise: Business Development especially for Edtech software solutions and services, BPO/JV, acquisitions, channel partners and creating government partnerships |
|  | Oonagh Heron   * CV: Sector experience includes education (construction and DfE/SFA projects); healthcare; soft and hard facilities management (FM); criminal justice system (MoJ); construction, waste management and local government. * Expertise: A specialist bid writer, editor, illustrator and bid-production consultant. |

## Strategy review

We recommend commencing a strategy review with our ‘Strategy survey’. This research tool was developed for our ‘Building Trusts’ research and provides a powerful diagnostic assessment. The confidential 10-minute survey is easily completed by Trustees, Headteachers, Chairs of Academy Committees and senior central leadership staff. The outputs provide perspectives on the sort of Trust you are now, and what you aspire to be; areas where you self-assess as having higher or lower performance; and appetite for standardisation or centralisation of each area of operational and educational activity. As well as providing average results for your Trust compared to others, you can also see the level of consensus, or disagreement, within your Trust (individual survey responses are not visible, so views can be given freely).

#### Example output from Strategy survey: what is the main role of our MAT? How much do we agree with each other about that?



#### Example output from Strategy survey: appetite for greater standardisation/ centralisation

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Blue: current; red: future

### Workshop with Trustees and senior leaders

We will facilitate a discussion about the strategy survey findings with your Trustees and senior leaders – exact participation will be agreed with you. This will provide valuable insight into areas where there is a strong collective desire for change, and areas where there is a need to build consensus.

We will discuss your ‘Design Principles’ (success criteria), and their relative importance. Clearly financial impact, educational performance, and fit with your ethos and values are important. Other criteria may include (for example) sustainability of provision, benefits to Trust staff (central teams, teachers, support staff, leaders), and ease of implementation.

## Operating model review and redesign

Our operating model assessment will consider the combination of:

* Organisation, Capabilities (People, Systems, Processes) and Governance
* ‘Back office’ functions (finance, procurement, estates/facilities, health and safety, safeguarding, HR services (payroll, policies), recruitment, retention and staff development, IT, and education data.

Our ‘Operating Model’ review tool-kit provides a simple way to gather a holistic picture of these three aspects. Our review covers the following steps:

* Collecting a high-level view of the main IT systems used for Finance, MIS, Assessment, HR, Health and Safety, Asset management
* Collecting and benchmarking data on the people (FTEs) and other costs involved in delivering each of the Back-Office functions, at central and school level. This will go well beyond data currently held by finance teams and auditors, and is an essential step before designing the future

#### Example output from benchmarking – finance function example

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* Assessing the organisational arrangements (organogram) of each function (central and school level)
* Understanding the schemes of delegation and how these link to responsibilities
* Interviewing education and operational staff, as well as Trustees and governors, to gather their perspectives on strengths, weaknesses and opportunities:

#### Example output from operating model assessment: Finance function example

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### Findings workshop

We will analyse the findings from the data and interviews, and create alternative options for the future based on your criteria.

We will run a workshop with a project group to discuss findings, options and recommendations. We will gather structured feedback and advice on these findings.

### Additional considerations

Implementing this change we have learned that a number of additional considerations are required in order to achieve a successful outcome:

* Role of SBMs:
  + SBMS are often involved in the functions set out above, and their time and value add would be captured during the data collection.
  + However, they often undertake a range of other activities not directly within the central back office functions.
  + We will support the collection of these activities, and the time spent on them, so that when options for redesign are considered it is clear how these tasks would be undertake under future models
  + In some redesigns, we find that an ‘Office Manager’ role will often pick up local senior administrative gaps, and we will provide an initial job spec identifying activities that SBMs have historically undertaken
* ‘Gives and gets’:
  + MATs sometimes decide to centralise management of back office functions. School leaders will understandably be concerned about moving from a model where they can prioritise activities between staff under their direct line management, to one where they are accessing a service in which a central team is prioritizing between their school and others.
  + If the review leads to central management of some back office functions, we will support the production of an initial set of ‘gives and gets’ to provide reassurance to schools about future working, and to provide accountability for central teams for the service they will provide.
  + Some Trusts use this to produce full ‘Service Level Agreements’, others build it into individual performance targets, depending on culture and management preferences.

### Final Report

We will produce a Final Report setting out the current state analysis, in terms of overall operating model and in terms of each function.

We will set out future options, their relative pros and cons compared to your criteria (including their annual operating costs/ savings) and set out a recommended option.

#### Example table of contents

Executive summary and recommendations

Background, approach and limitations

Operating model findings:

* Finance
* HR
* IT
* Estates
* Organisation
* Capabilities
* Governance

Options and appraisal

* Status quo
* Future options
* Preferred option (‘Target Operating Model’)

Target Operating Model

* Design (organisation, capability, governance)
* Cost assessment
* ‘Gives and gets’ between head office functions and schools (see above)
* SBM / Office Manager Activities (see above)

High level Road Map for implementation

#### Example of detailed structure design: Finance function example

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#### Example of cost of current and future structure, and costs of change – finance, IT, Estates

