

Academisation Update

September 2025

Foreword

The vision for schools in the Diocese of Lancaster is deeply rooted in the desire to preserve, protect, and enhance the Church's mission in education. We see our schools in relationship – with each other, with the wider Diocese, and particularly with the parish communities they serve - and thus of being one body in Christ, with the calling to mutual support and flourishing that this implies. With this comes the desire to foster greater closeness among the schools of the Diocese, creating shared structures of support and friendship, but also resilience and solidarity. By bringing schools together into their Trust families, we desire to best serve the wider mission by ensuring that our endeavour, as well as our sacrifices, are ordered toward the success and flourishing of all.

The Diocese of Lancaster provides schools for the support of parents in the Catholic education of their children. This means our mission is rooted in the fundamental duty to help every child flourish in a manner that befits their dignity as children of God in order that they may enjoy 'life to the full' (John 10:10). For this, our schools must be places of intellectual, cultural and spiritual flourishing, a home from home, where children and young adults can attain personal excellence in their studies, but where they may also advance in virtue and come to understanding of God's purpose in their lives.

Where there are obstacles in pursuit of this vision, they must be overcome. Where those obstacles are systemic rather than temporary, then we are all called to the project of creating a better system for the wider benefit of all.

In joining together as a family of schools, united in faith under the Bishop of Lancaster, we mark out a future in which we see ourselves as a people called to a common endeavour, a shared mission, for the good of all who come to us in search of what - or rather, Who - our schools should bring them toward. This may be a new way of seeing things in the educational landscape, but it is a very old way of seeing things in the theological one: our mission is not only local, it does not stop at the school gates, but is shared and mutually re-enforced, in solidarity, for the benefit of the most vulnerable amongst us.

At times, we may all find ourselves in a position of relative strength. At other times, despite our best endeavours, we may find ourselves in a position of vulnerability. Wherever we may find ourselves at any particular moment, it is central to our identity as Catholics, to the call of unity as a people of God, that when we are called to service, we are less inclined to ask what we might get, but more inclined to ask what can we give. It is this giving - the gift of ourselves - that we seek to encapsulate in the way we form our mission in schools.

Our Multi-Academy Trusts, then, are not corporate structures so much as they are - and should strive to be - loving families, where all members share their joys and challenges as equal partners, as faithful sons and daughters of the Church, in which the loss or vulnerability of one of us, is a wound felt by all. In being called to communion in this way, we can grow in Christ, as a people of God, called to heroic virtue, living out the social doctrines of our Church in shared endeavour across the Diocese of Lancaster.

By so doing, we can truly say of each other, with the words of St Paul: *'If one part suffers, every part suffers with it; if one part is honoured, every part rejoices with it.'* (1 Cor 12:26)

Canon Michael Docherty

Episcopal Vicar for Education and Formation

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Thank you

We are profoundly grateful to all those who have embraced the journey toward this new vision for schools in the Diocese of Lancaster. By undertaking this work, you have helped ensure that we continue to flourish within a schools' system rooted in our shared values and mission.

We recognize that the journey toward academisation is not without its challenges. The move from a model of education that has been in place for 81 years, since the Butler Act of 1944, is bound to have its bumps and starts. Those who were first to commit to this process have embraced the challenge of growing this new model, but also many of the hardships that come with transition; they have been the ones to plant the trees under whose shade others will come to sit.

We are incredibly grateful for your service to the wider mission in education.

Just as a body, though one, has many parts, but all its many parts form one body, so it is with Christ. For we were all baptised by one Spirit so as to form one body—whether Jews or Gentiles, slave or free—and we were all given the one Spirit to drink. Even so the body is not made up of one part but of many.

Now if the foot should say, “Because I am not a hand, I do not belong to the body,” it would not for that reason stop being part of the body. And if the ear should say, “Because I am not an eye, I do not belong to the body,” it would not for that reason stop being part of the body. If the whole body were an eye, where would the sense of hearing be? If the whole body were an ear, where would the sense of smell be? But in fact, God has placed the parts in the body, every one of them, just as he wanted them to be. If they were all one part, where would the body be? As it is, there are many parts, but one body.

The eye cannot say to the hand, “I don’t need you!” And the head cannot say to the feet, “I don’t need you!” On the contrary, those parts of the body that seem to be weaker are indispensable, and the parts that we think are less honourable we treat with special honour. And the parts that are unpresentable are treated with special modesty, while our presentable parts need no special treatment. But God has put the body together, giving greater honour to the parts that lacked it, so that there should be no division in the body, but that its parts should have equal concern for each other. If one part suffers, every part suffers with it; if one part is honoured, every part rejoices with it.

1 Cor 12:12-26

Where Are We Now

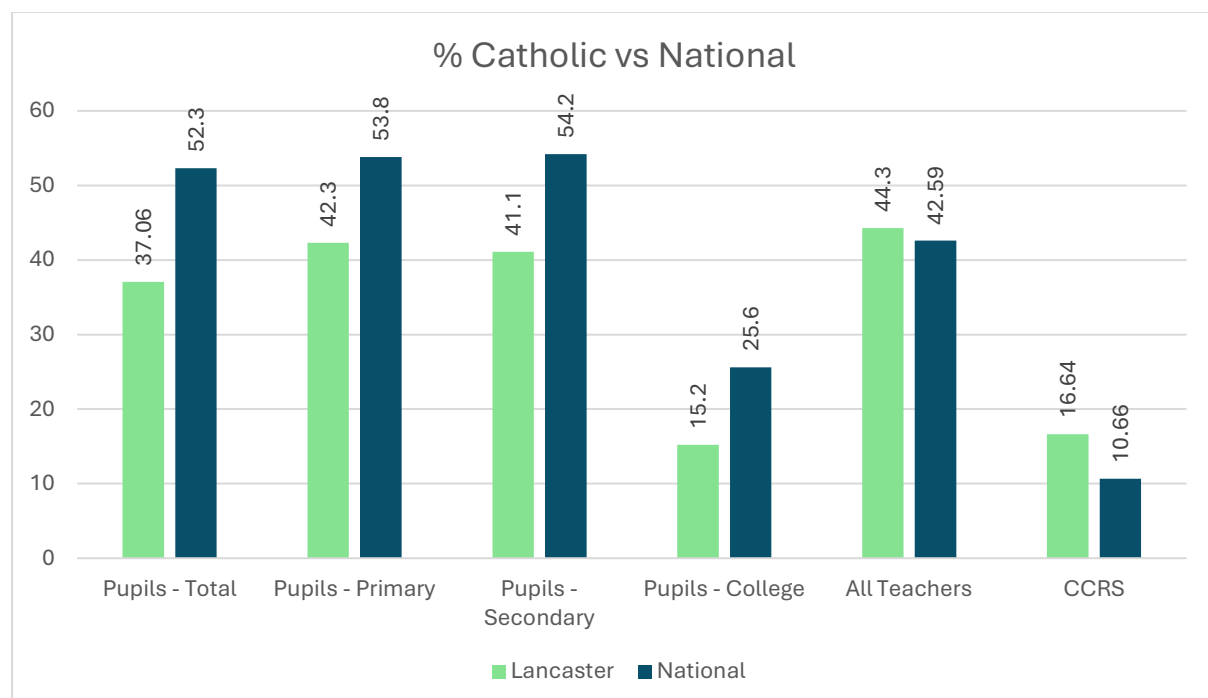
In this section, we will outline key demographic data of the Diocese and try and place it within a national context. We will also explain other key factors which have or have had an impact on the Academy strategy, including both local and national developments.

The Schools of the Diocese

The information below is taken from the 2025 census, based on data from January 2025. The final report will be available from the CES website upon publication.¹

The Diocese of Lancaster has 81 maintained schools and two independent schools, comprising a total of 27,183 learners. This makes it a mid-sized Diocese in numerical terms, though with a high number of schools compared to its Catholic population. Partly this is legacy, as a period of higher Catholic population – linked to historic migration patterns – encouraged a period of historic school expansion that means today we retain a higher number of Catholic school places than for which there is demand.

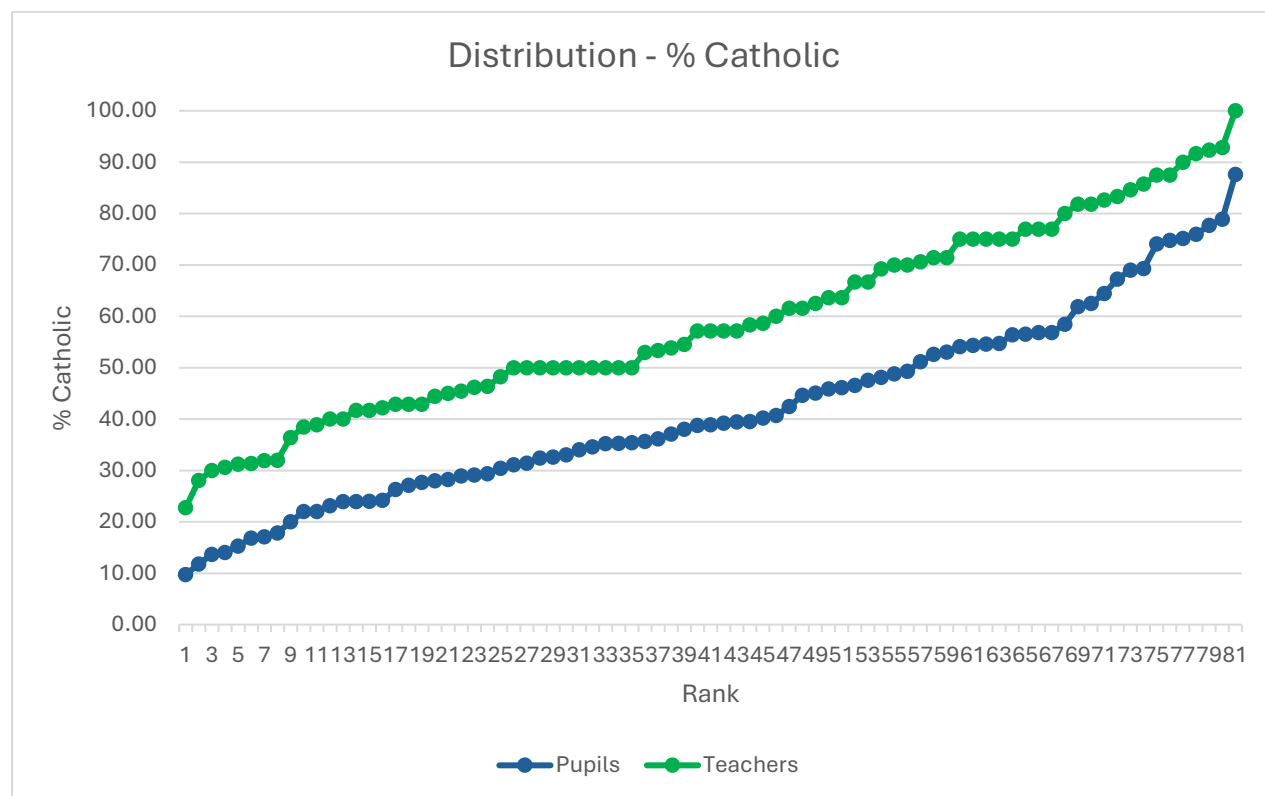
Trends in more recent years have seen Lancaster sitting typically below national averages for Catholic pupil numbers, and in 2024 census only one other Diocese in England had lower rates of Catholic pupils in their schools than the Diocese of Lancaster. This trend continues to be reflected in 2025 data.



In terms of distribution, there is great variability by local context with 12% of our schools under 20% Catholic pupils, and two schools under 10%. At the same time, 32% of our

¹ <https://www.catholiceducation.org.uk/census>

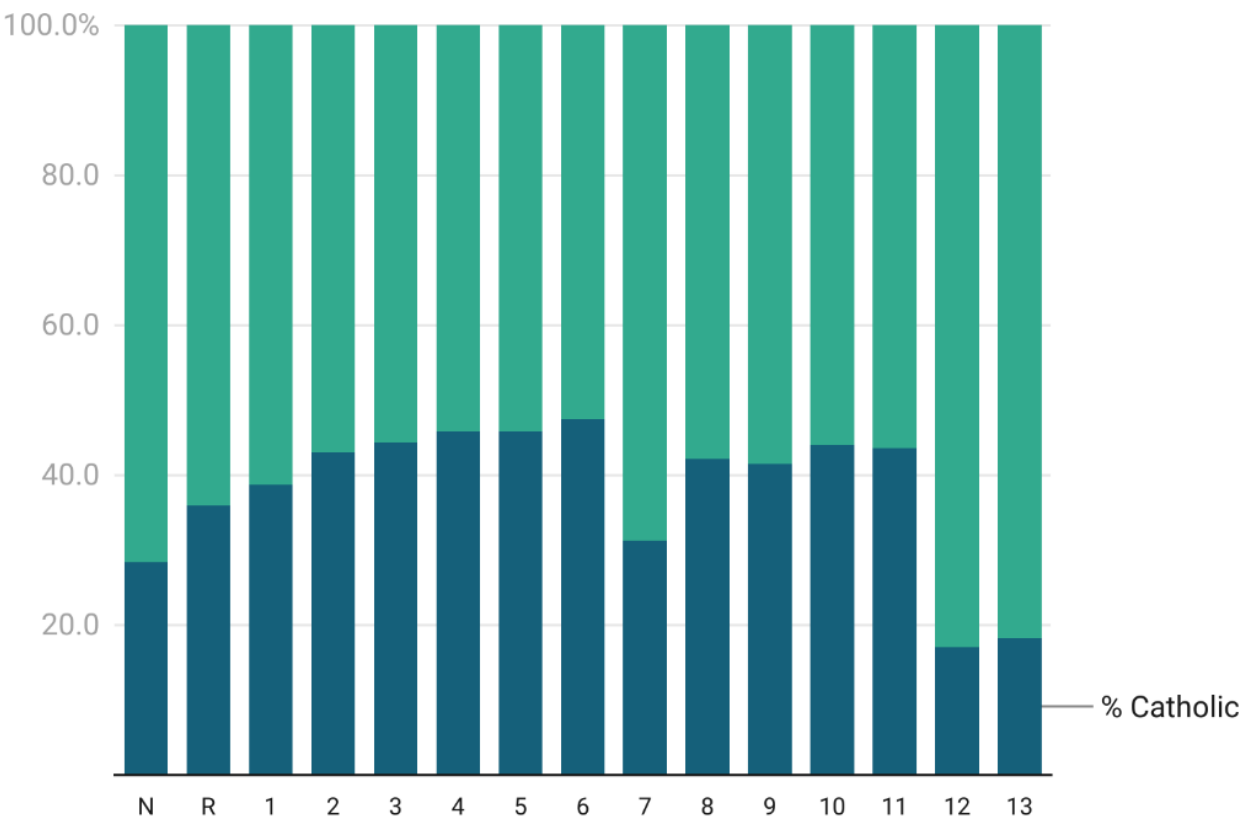
schools are higher than national average. In terms of place sufficiency, whilst there are areas in which supply of Catholic places far exceeds demand, nonetheless those same schools remain popular with the wider non-Catholic community.



The trend in Catholic pupil numbers is visible in year group figures, in both national and Diocesan data sets, with a declining trend toward Reception intake for Catholic places. This suggests we will continue to see a drop in Catholic pupil numbers across our schools.

Group	N	R	1	2	3	4	5	6	7	8	9	10	11	12	13
Total	950	1699	1680	1803	1833	1893	1856	1889	1751	1725	1761	1697	1646	2703	2253
% Catholic	28.3	35.8	38.7	43	44.4	45.7	45.8	47.5	31.2	42.1	41.5	44	43.6	17	18.2

Catholic Pupils by Year Group



Academisation in the Diocese of Lancaster

Within such an environment, the response to the vision for schools in the Diocese of Lancaster has been encouraging.

As of January 2025, there were 27,183 of pupils in schools across the Diocese of Lancaster, with 22,187 within the maintained primary and secondary phases. Of these, 10,951, or 49%, were educated within academy schools. 53 schools out of 81 total (65%) in the Diocese of Lancaster have either converted or are in the process of converting.

By Trust, this breaks down as follows:

- **Blessed Edward Bamber:** 20/22 schools (90%) – 5016 learners. All primary schools in this Trust are now joined or in the process of doing so.
- **Mater Ecclesiae:** 17/23 schools (74%) – 4050 learners. Four further schools are due to join in the academic year 2025/26 to meet Diocesan deadline for conversions, bringing the Trust to 21/23 schools, and 4659 learners.
- **Mater Christi:** 16/35 (46%) – 3397 learners. Growth in this Trust has been paused to allow for a period of consolidation. A new strategy is being developed in

consultation with stakeholders, and we will look to resume with growth plans in due course.

Newman College

As an FE College, Newman presents a different set of challenges and opportunities which continue to be explored in conjunction with the College. Whilst it remains the plan for Newman to join the academy family, the current priority is bringing the Mater Ecclesiae trust to full capacity before exploring next steps in greater detail. Dialogue continues with the College and future plans will be announced in due course.

National Trends

The figures for conversion in the Diocese of Lancaster compare broadly with national trends. Every Diocese in England has an academisation strategy, though there is variability in how far advanced those plans are in terms of completed conversions. There are Dioceses now completely academised or very close to being completely academised², and others that have announced their plans and are just beginning the journey toward full academisation.

At the time of the 2025 census, 52.2% of all Catholic state-funded schools were academies. Nationally, 51.6% of state-funded Catholic primary schools were academies, rising to 61.9% of state-funded Catholic secondary schools. This is based on January 2025 data and one would expect further conversions to have completed in the meantime. By the autumn term, once active conversion processes are complete, Diocesan rates will be above national average for primary (65%) and below national average for secondary (36%).

This varies from national data for non-Catholic schools, as of January 2025, in which 46% of all primary schools are academies or free schools, and 83% of all secondary schools are academies or free schools³.

In terms of Appendix 8 forms submitted, signalling intent to academise as per the academisation strategy, we are currently sitting at approximately 90%, though the pause on growth at Mater Christi has meant a new strategy for conversion must be developed.

Changing political landscape

Since the academisation strategy was first developed, there have been significant changes to the educational landscape. These have presented a challenge to the vision for schools in so far as it has impacted the implementation process.

² For example, Nottingham, Plymouth, Hexham and Newcastle

³ <https://explore-education-statistics.service.gov.uk/find-statistics/school-pupils-and-their-characteristics/2024-25>

The two most significant aspects of these changes have been:

- The removal of the £25k conversion grant for schools choosing to become academies
- The removal of the Trust Capacity Fund (TCAF) designed to help Trusts grow their central capacity to support schools

In practical terms, the removal of conversion grants has had variable impact. Where a Trust has many schools still waiting to convert, the loss of the conversion grants has a significant impact and will mean a new growth strategy must be considered. However, in Trusts where most schools have already joined and received conversion grants before deadline, impact has been more limited.

To try and minimise the impact lost conversion funding may cause, we have reviewed conversion costs and tried to bring them as low as possible, by negotiating legal fees, reviewing Diocesan charges, and reviewing which aspects of due diligence can be carried out in a more efficient way. One variable we cannot control is LA charges for conversion, and these vary across the four local authorities with which we work.

The removal of the TCAF fund has been a greater challenge for our Trusts. This funding was intended to support Trusts to grow their capacity to better support schools. Without this funding, Trust leaders have had to reconsider their growth plans to ensure stability and sustainability. In some cases, this means slower growth and rethinking the schedule for delivery of central services.

These challenges have not, however, led to a significant jump in Trust fees, and as of summer 2025 our Trusts compare well to national data relating to costs to schools. All three of our Trusts currently ask for the same contribution of 5%. This funding is used to create the capacity of the Trust to provide the enhanced support a Trust can offer. In this sense, the 5% fee is an investment in the shared resources available to all schools within the Trust, which on an individual school level may not have otherwise been accessible. This fee compares well against national averages where the average top slice by MAT size was as follows:

- Small MAT (fewer than 3,000 pupils) = 8.8%
- Medium MAT (between 3,000 and 7,500 pupils) = 6.9%
- Large MAT (more than 7,500) = 5.5%

All three of our MATs qualify as medium-sized MATs for the purposes of this comparison.⁴

Size matters

Within the wider academies landscape, it is evident that achieving an optimal scale is essential to realising the intended benefits and strengthening school performance. The

⁴ <https://www.bishopfleming.co.uk/insights/academies-benchmark-report-2025>

academisation strategy has been designed to strike a balance between sufficient scale, local identity, and geographical coherence—enabling each Trust to operate with the capacity necessary to meet its responsibilities, while preserving a distinct sense of identity and appropriate levels of local autonomy. The overarching objective is to develop Trusts that are both regionally aligned and of a scale that supports effective governance, operational resilience, and the ability to respond robustly to emerging challenges.

Of course, this aspiration relies on the Trusts being able to grow to their intended size. Where this is not the case, where a Trust remains incomplete, then the accompanying family of schools is more vulnerable than it might otherwise be. Research is clear that larger MATs are more resilient⁵, and have capacity to find scale-savings, to generate greater income, to better withstand fluctuations in funding – for example, absorbing the difference between funded and unfunded pay rises - or to cushion the immediate fallout from demographic change. In short, scale, structure and strategic efficiency are essential to provide the sustainability for the future.

Governance

Recruitment of governors continues to be a challenge across all types of school, in all areas of the country, though with particularly pronounced challenges in rural and disadvantaged areas. This mirrors wider national trends of a significant reduction in the rates of people volunteering.⁶

As of summer 2025, we are holding 76 Foundation Governor vacancies, with 28 (37%) across our MAT schools and 48 (63%) across our VA schools. As our converted academy schools represent 58% of our schools estate, early indications suggest that the Trust system is helping us provide more consistent and stable governance, although significant challenges remain.

This difficulty in recruitment mirrors national trends, with recent research suggesting 68% of academies report vacancies at local governance level⁷, whilst research from the NGA in 2023 reports similar rates of challenge across all forms of school organisation⁸.

Impact

Recent political developments, particularly those being introduced through the Children's Wellbeing and Schools Bill, include changes that may affect Trust autonomy in areas such as curriculum, recruitment, and admissions. While these changes are regrettable, they do not fundamentally undermine the academisation agenda for

⁵ <https://www.bishopfleming.co.uk/insights/academies-benchmark-report-2025>

⁶ <https://www.gov.uk/government/statistics/community-life-survey-202324-annual-publication/community-life-survey-202324-volunteering-and-charitable-giving>

⁷ <https://www.kreston.com/kreston-uk-academies-report-2025/>

⁸ <https://www.nga.org.uk/news-views/directory/meeting-the-challenge-of-governance-volunteer-recruitment/>

Catholic schools, nor do they diminish the potential of the Trust model to address many of the strategic risks and challenges identified in the original academisation strategy. In the context of the broader vision for Catholic education outlined in this document and elsewhere, we continue to believe that the strategic and educational benefits of academisation outweigh the limitations these changes may introduce.

Accordingly, we remain committed to the goal of full academisation within the indicated timelines and encourage all schools to continue working in partnership to achieve this objective.

Wider challenges

In what follows, we outline the wider challenges being faced by all our schools, and which shape the context in which all operate. These changes impact all our schools, whether Voluntary Aided or Academy, however many were identified as risks in the initial strategy, with the Trust system identified as part of our response to these challenges.

Pupil Numbers

The outlook for pupil numbers across England's school system presents a challenging picture. The number of children attending primary and nursery schools reached its highest point in 2019 and has been steadily declining ever since. This trend mirrors the ongoing reduction in birth rates that began around 2013.⁹

Looking ahead, the primary school population is expected to continue falling through to the end of the current projection period in 2028. Meanwhile, the number of secondary school pupils is set to rise slightly until 2027, after which it too is predicted to begin to decline.

As of 2024, the total number of pupils in state-funded schools stood at 7.95 million. This figure is projected to fall by approximately 172,000 over the next four years, reaching around 7.78 million by 2028. The government have recently updated figures, to predict there would be 400,000 fewer pupils in schools by 2030.¹⁰ These shifts signal significant challenges for schools and will be felt to a differing degree depending on location¹¹.

Across the Diocese, these trends will have varying impact on our schools. Across Westmorland, there is forecast to be 24% excess places within the primary phase by 2027, whilst in Cumberland this figure stands at 20%. In Blackpool this figure currently sits at 18%, whilst in Lancashire there is greater variability with some areas having up to

⁹ <https://explore-education-statistics.service.gov.uk/find-statistics/national-pupil-projections/2024>

¹⁰ <https://www.tes.com/magazine/news/general/pupil-numbers-to-fall-sooner-than-expected>

¹¹ <https://www.ons.gov.uk/visualisations/dvc646/map2/index.html>

25% excess places by 2027, whilst other areas require added school places due to inward migration and house building.

In specific areas, there is an ever more acute local impact. There are parts of the Diocese which are projected to experience a drastic drop in school rolls over the next three years, with a projected 40% (in some cases higher) excess places in an area. In this scenario, the security provided by the Trust system, to protect schools from closure outside the planning or consent of the Diocese, will be a vital tool as we consider our schools system and how we meet these challenges.

SEND

The wider education sector is grappling with a complex set of difficulties, and our schools – naturally inclusive and welcoming spaces for all children - are often at the forefront of these challenges.

The rising demand for support for children with Special Educational Needs and Disabilities (SEND), and the capacity to provide it, continues to be a significant challenge whilst the ability to attract and retain staff willing to take on this level of difficult and at times stressful work remains challenging. Across England, EHCPs are up by 11.1% from 2024, and up by 20.4% from 2023, with 5.3% of all pupils in England now on an EHC plan¹². Similarly, 14.2% of all pupils receive SEN support without a health care plan, up from 13.6% from the previous year, and 13.0% in 2023.

Local authorities are facing growing deficits in their high needs budgets, with schools having to pick up the slack from within their own resources but also reducing local capacity to provide other important services. As a result, many schools still experience delays in obtaining assessments, resulting in pupils not receiving the support they are legally entitled to and schools trying their best to provide for their needs in often highly stressful situations. This can put particular strain on individual schools, who may lack the resource or capacity to manage this demand effectively.

Evidence suggests that SEND rates correlate with deprivation, with children in poorer areas more likely to be identified with special educational needs and requiring further support¹³, but also less likely to receive a precise diagnosis and a formal support plan¹⁴. Furthermore, of the four (previously three) local authorities that comprise the Diocese of Lancaster, all have been required to provide a Written Statement of Action in response to an adverse inspection of the SEND provision and support since 2019.

¹² <https://explore-education-statistics.service.gov.uk/find-statistics/special-educational-needs-in-england/2024-25>

¹³ https://www.researchgate.net/publication/375598177_Inequalities_in_provision_for_primary_children_with_special_educational_needs_and_or_disabilities_SEND_by_local_area_deprivation

¹⁴ <https://schoolsweek.co.uk/send-children-in-richer-areas-more-likely-to-get-an-ehcp-and-precise-diagnosis/>

Recruitment

Teacher recruitment and retention continues to pose problems, though again with variability by area. Nationally, there has been an increase in teacher vacancy rates and a small drop in the number of teachers, with the primary sector seeing a decrease of 1.3% in 2024¹⁵, whilst the number of vacancies sits at 2,200 in November, a small drop compared to the previous year but a significant rise from 1,100 in November 2020. Recruitment and teacher shortages are consistently worse in schools which serve disadvantaged areas¹⁶, a factor that hits our schools acutely as Catholic schools are disproportionately situated in disadvantaged areas¹⁷. This same trend is observable for recruitment of subject specialists, with rates of specialist subject teachers lower in areas serving the lowest quintile of the population¹⁸.

The recruitment challenge is particularly acute for the Catholic sector, and the need to attract RE specialists, where recent research identified that whilst only representing 9% of the school sector, 25% of all vacancies for RE posts were in Catholic schools.¹⁹

Whilst recruitment to Headship has, in general, been robust across the Diocese, the increased turnover in leadership position post-covid means we have a significant number of posts that are either new to Headship or new to Diocese. For example, since September 2022 the Diocese has appointed 33 Headteachers and one permanent Executive Headteacher, with 35% of primary Heads new to Headship and 27% of secondary Heads. This means one third of all Headteachers in the Diocese of Lancaster are in their first three years of Headship, though this varies geographically.

Where recruitment to Headship has been more difficult, alternative models to school leadership have been explored, including Executive Headship and Heads of School. Where this has been put in place, the Diocese remains clear that any Head of School positions must be reserved for practising Catholic under the Bishop's Memorandum.

Wider Challenges

There are numerous other challenges that continue to be felt by schools across the Diocese. Funding remains a major concern across all school types, driven by rising costs, static income, and increasing unfunded responsibilities. While a cash increase has been announced in the recent budget, when taking into account inflation this equates to a 0.4% real-term growth, with the added cost of wider eligibility for free school meals, gaps in funding for pay rises, and future SEND reforms still to be factored into these

¹⁵ <https://explore-education-statistics.service.gov.uk/find-statistics/school-workforce-in-england/2024>

¹⁶ <https://www.nfer.ac.uk/blogs/nfer-dashboard-highlights-why-teacher-shortages-are-a-key-challenge-facing-government-s-opportunity-mission/>

¹⁷ <https://www.stmarys.ac.uk/news/2017/free-school-meals-data-has-potential-to-be-misleading-according-to-st-marys-research>

¹⁸ *ibid*

¹⁹ <https://committees.parliament.uk/writtenevidence/120523/pdf/>

calculations²⁰. Beyond this, our schools are also contending with the deteriorating condition of the school estate²¹, with significant investment still required²², in addition to ongoing challenges around attendance, parental engagement, curriculum, pupil behaviour, complaints, changes to inspection frameworks, changes to curriculum, and increasing expectations to provide support services for children and families in crisis.

In conclusion, the educational landscape is as difficult today as it has been in a very long time. Navigating these challenges will require resilience, skill, and fortitude. We believe that our schools are best placed to weather these challenging circumstances as part of their Trust family.

²⁰ <https://ifs.org.uk/articles/what-spending-review-really-means-schools>

²¹ <https://researchbriefings.files.parliament.uk/documents/CBP-7375/CBP-7375.pdf>

²² <https://schoolsworld.co.uk/schools-repair-bill-much-higher-than-13-8bn-estimate/>

Things to celebrate

In our previous strategy, we explained that the move toward academisation was a response to two layers of challenges and opportunities, one school-based and one from the strategic, system-level perspective. We labelled these roughly as **preserve and protect** for the strategic conversation and **nourish and enhance** for the school-level considerations. We also acknowledged that many schools would understandably be focussed on the latter half of this equation and that some of the strategic opportunities and risks identified were not equally distributed and thus might be felt to differing degrees, in different places, at different times. We also acknowledged that, whilst challenges might not be experienced in an identical way in every setting, nonetheless this did not mean that the solutions to those challenges were not a shared endeavour.

In this section, we will share some of the positives changes we are observing that deserve celebration. These reflections are non-exhaustive and based on observations over an extended period of time, whilst the case studies provide some examples of where these trends are in evidence.

Catholic Life

There has been encouraging collaborative work on support for Catholic life and mission. We are seeing schools provided with opportunities for structured, planned support for key areas of Catholic leadership, including Catholic life, governance, prayer and liturgy, inspection, and spiritual formation. This has enabled the Diocese to consider more targeted training support but also enabled a greater number of schools to access levels of expertise that may not have previously been possible due to limited Education Service capacity.

In addition, Trust-wide events have been successful in bringing together families of schools, focussing on mission and the Catholic identity of our schools. These opportunities for shared liturgy and worship, in

CASE STUDY – BEBCMAT

The Blessed Edward Bamber Multi Academy Trust held a dedicated Catholic vision and mission day entitled 'Called to Serve'.

This provided an opportunity for staff to come together to reflect on, explore, and deepen their understanding of the Catholic ethos and mission that underpins the Trust's work.

The day featured a keynote input from Bishop Paul Swarbrick and a talk from Deacon Bernard Farrell-Roberts on the life and legacy of Blessed Edward Bamber, which led on to the launching of the Trust prayer written in a focus afternoon with Chairs of Governors, Directors, Headteachers, Chaplains, and RE Subject Leads.

This was followed by sessions enabling school groups to reflect on the call to serve, helping staff gain a stronger awareness of the unique purpose and mission of the Trust.

At a follow-up INSET, with the theme of wellbeing, staff were able to choose from a series of themed workshops, including a reflection from the Diocesan Director of Formation, and followed by a *Laudato Si* Beach Clean, highlighting the call to social action that comes with Catholic education.

collaboration with the Diocese, have become key markers in the shared life of the Trusts.

In time, all three Trusts will have a Director of Catholic Life, ensuring the capacity to support Headteachers and senior leaders in the Catholic leadership of the school. In some instances, this work has already begun, and we are working with the Trusts to develop job descriptions and scope for these roles, to ensure close working with the Diocese and to provide as much high-quality support to schools as possible.

Policy

We have seen a greater alignment in policy, particularly those key policies which protect and preserve the Catholic identity of a school. With Trust oversight, we have greater assurance that key documents such as CES employment contracts, admissions policies, protocols and key school guidance documents are in place. This provides Trustees with greater confidence regarding the governance of our schools and reduces vulnerability of those schools. We are also encouraged to see ways in which Trusts have been able to use their resources to develop new policies and procedures respectful of the Catholic life and ethos of the school. Historically, many schools have been reliant on policies or procedures that were locally agreed or purchased as part of a policy suite, rather than provided or endorsed by either the CES or the Diocese. We are seeing Trusts begin to develop comprehensive policies based on or in alignment with CES guidance, ensuring the Catholic identity and ethos of our schools is embedded into the policy environment. We have also witnessed Trust expertise utilised to support national CES working groups in updating these policies, ensuring the Catholic sector has access to robust and reliable policy support for our schools.

Resilience

In light of the challenging circumstances faced by many schools, the MAT structure is providing an important layer of protection and support for schools who may be experiencing difficulty with pupil numbers and finance. This is particularly the case where place planning conversations have moved toward the question of school closures. As our schools are now in Trust control, any decision for closure is for the Diocese alone, and Trust support has helped them manage the added demands placed on them whilst local conversations take place. In addition, where a school has suffered unfair treatment, or a decision has been made locally that undermines the viability of a school, there has been an urgent and proactive response by the Trust to ensure robust challenge. This means school closure cannot be imposed on the Diocese without our explicit consent – either directly or indirectly - and this can help us continue to retain a Catholic presence in areas that may otherwise have been facing questions regarding viability.

Crisis response

MAT capacity has helped deliver a degree of resilience where a school enters into crisis. This can be in finance, recruitment, leadership, or managing crisis situations such as temporary closures, bereavement, or out-of-the-ordinary events. The nature of this support differs by event; however, we have witnessed many situations where this immediate backing has been vital in ensuring a school is able to continue to focus on its core purpose – and be supported to work through any challenges – in a way that minimises disruption. A frequent example is ensuring continued leadership options where a school has not been able to recruit or experience an unexpected absence. However, we also have in mind the provision of quick-response support where standards have become a challenge, and there have been instances where a Local Authority has asked a MAT to support a school as they have lacked the capacity to do so. Furthermore, Trust support to school leaders and governors as they manage difficult issues – for example, employment issues or complaints – has been a great reassurance, particularly in a system with so many Headteachers at the start of their leadership careers.²³

Recruitment

We have been encouraged to see a notable upturn in recruitment trends this academic year compared to previous, with an increase in the numbers applying for reserved posts and fewer examples of failure to recruit. Whilst it is not possible to identify a single root cause for this trend, nonetheless the shared work of the Trusts in developing effective recruitment strategies, providing HR support, and exploring a range of advertising strategies has helped with this situation.

The capacity of Trusts to develop bespoke opportunities outside of the traditional linear pathway to Headship has helped schools retain staff seeking advancement or new opportunities elsewhere. This has enabled our schools to

²³ Across the Diocese of Lancaster, 35% of Primary Heads and 27% of Secondary Heads are in their first three years of Headship. These figures may soon rise, as there are outstanding vacancies to fill.

CASE STUDY Mater Christi MAT

The Mater Christi Trust is able to create opportunities for collaboration and improvement across our Catholic schools that would not otherwise be possible for schools working across such a rural and dispersed area.

By drawing together its family of schools into a shared calendar of events and celebrations, the Trust can overcome geographical challenges and the feeling of isolation that some schools historically felt. In addition, schools are able to access levels of expertise and support that was historically not always locally available. This is particularly true in support for Catholic life, shared Trust-wide liturgical events, and shared formation and CPD days.

Alongside this, the Trust has created a series of four school cluster groups, each aligned to the Trust's Development Plan, ensuring every school has access to a wider professional network while also receiving focused, bespoke support as needed. This enables all schools to both contribute to and benefit from Trust-wide capacity, and be part of a tight-knit Catholic professional community.

retain talent and experienced members of staff, including those who would not have otherwise been eligible for advancement into senior leadership, for the benefit of the children in our schools. Whilst we have anecdotal data for this, it will be important to monitor and determine impact over a longer period of time.

Buildings and Estates

We have been particularly encouraged to see the enhanced support available to schools via the estates work taking place across the Trusts, and the enhanced capacity to plan and manage estates across multiple schools. This has revealed areas where oversight from previous providers has not previously been as strong as it ought to have been, particularly with key items such as asbestos inspection and management. This has given reassurance regarding the safety and soundness of the schools' estate but also helped school leaders manage these burdens when this is often not their area of expertise, or particular interest. The close working relationship between Trusts has introduced greater levels of consistency to estate management, which has improved the ability of the Diocese to have oversight of the state of repair and maintenance of school buildings. The capacity to further develop a comprehensive estates management plan further gives trustees reassurance regarding the stewardship of the school estate and our capacity to be both aware and responsive as issues arise.

Governance

Having the capacity to properly support local governance across all our schools has been a concern of the Diocese for some time. The development of the Director of Governance role has helped alleviate these challenges, providing schools with effective and timely support to ensure strong governance at the local level. This includes the organisation and structure of meetings, identifying and supporting with statutory training, but also guidance in ensuring adequate levels of support and challenge. By working with the Diocese within a newly formed governance forum, we are reassured of greater levels of consistency, but also a greater number of options for local governors who may be looking for support,

CASE STUDY - MECMAT

Following the appointment of an experienced governance professional as Head of Governance, Mater Ecclesiae has been able to provide ongoing and expert support for schools within the Trust family.

This has included support for key processes such as recruitment, dealing with complaints, grievance processes, or meeting statutory obligations.

It also includes the signposting and oversight of key training, and a constant source of support for the broad range of governance responsibilities to be undertaken.

Termly briefings for Chairs have recently been launched, and the Trust supports governing boards by providing a schedule of business which helps ensure that, over the course of the year, all key items relating to governance is discussed.

There are also briefings provided and recommended points of check and challenge, to help ensure robust governance is taking place and can be evidenced during any future inspection.

All of this work constitutes a comprehensive support for local governors, in line with research findings suggest governors find most challenging about the role.

either with general governance, or dealing with a specific issue. Research demonstrates that levels of expectation, workload, and time commitment are key obstacles to governor recruitment and retention²⁴, and the development of a comprehensive governance support system is a reassurance. Whilst this is in its infancy, we are already seeing the benefits.

²⁴ <https://www.nga.org.uk/media/1cgdweku/nga-governance-workload-report-full-20231130.pdf>

Lessons to Learn

As in our original strategy, we wanted to include a section outlining what lessons we have learned in our work to date. This is not an exhaustive list but captures some of the key learning that has taken place since the launch of the updated strategy in April 2023.

Directors

The recruitment of Directors, like the recruitment of governors, is an ongoing challenge for all Trusts, with 40% of medium-sized Trust reporting difficulties in recruiting to Board level²⁵. Whilst we are fortunate to be blessed with many talented and committed people who do great work serving the Bishop as Directors within our Trusts, nonetheless, finding individuals with both the experience and the time available to provide effective governance oversight is an ongoing challenge. A multi-academy Trust is a highly complex organisation, and this requires an enhanced set of skills and expertise. Furthermore, identifying the appropriate level of training and development for those volunteering their time to take on these roles is a challenge too, and one that requires careful management. As such, finding more effective – and more efficient – ways of identifying those with the capacity to support in the governance of our Trusts will remain an ongoing focus.

Ways of Working

There remains in place a hybrid system, in which the Education Service supports both Voluntary Aided schools and those within Academy Trusts. Whilst there are many similarities between these two types of school, nonetheless the ways of working for each are different in significant respects, as are the range of stakeholders and discussions that may be necessary in response to any particular issue. At times this has presented challenges, particularly when it has become clear that principles for collaborative working within this new educational landscape need further refinement. Often these are not apparent until an issue becomes a problem, and this has led to moments of confusion or miscommunication between stakeholders when responses have had to be formulated *ad hoc* as issues arise. With time, we anticipate being in a better position to identify what kind of refinements to prior ways of working are necessary, and work will continue to build these new understandings into our policies and protocols.

Service capacity

The move toward a new system for our schools has brought with it the need for expertise beyond that commonly formed within an exclusively VA maintained system. As an example, the move from working with individual Headteachers responsible for a single school, to cluster leads or executive officers responsible for many schools, requires an alternative set of expectations with different types of conversations, knowledge and soft skills. In addition, the oversight Diocesan officers provide on behalf of the Bishop –

²⁵ <https://www.kreston.com/kreston-uk-academies-report-2025/>

through the Annual General Meeting, the MAT Evaluation process, and through ongoing dialogue and discussion – also requires enhanced levels of understanding of how the academy system operates and what expectations should reasonably look like. Whilst much of this is developing organically in line with the changing schools’ landscape in the Diocese, it also requires access to levels of domain specific expertise which must be identified and embedded into our systems of working, in addition to the ongoing capacity demands of supporting the remaining Voluntary Aided schools.

Data Sharing

Historically, the Education Service has adopted a comparatively hands-off approach to many aspects of school operations. This was appropriate to the time, with school leaders and governors entrusted to ensure the ethos, health and sustainability of our schools, with the Local Authority with responsibility to provide oversight of standards. As such, the role of the Education Service has historically been more oriented toward strategic oversight and training provider rather than forensic monitoring, meaning the level of data held by the Service on individual schools has been narrow – certainly there has been nothing akin to an MIS for the Diocese, and it is only with the development of Trusts that there has been a market to provide such solutions.

At times, this has meant there have been emerging vulnerabilities which have not always become apparent through school or local authority conversations, and which have come to light once the due diligence process begins. Whilst a risk assessment framework has been developed to inform conversion planning and scheduling, the existence of issues beyond our systems of oversight has, at times, created complications in implementation. Addressing these gaps will be critical to strengthening future awareness and ensuring smoother transition into the Trust system.

Vision

The great majority of schools have aligned with the academisation strategy, and this is to be celebrated. However, there remain a small number of schools where this is not the case. We must accept that, as an Education Service, we have failed to make the case in a sufficiently compelling way to allay the concerns of some and encourage full embrace of the Bishop’s vision for his schools in the Diocese. In particular, we have not been compelling enough for some in outlining the Catholic principles and teachings underpinning the Bishop’s vision for our schools and this has led to doubts being expressed about whether this development is consistent with Catholic social teaching. This is a matter of regret and an item for ongoing consideration.

Oversight

A common concern raised in relation to the academisation process is the potential risk of a Trust not aligning with Diocesan policies, values, or strategic direction. Such

misalignment could lead to a higher level of disruption than would typically be experienced with an individual school. The question was usually framed around risk-mitigation – what mechanisms might be available to address such situations if they were to arise.

Whilst this risk is considered to be small, it has nonetheless prompted reflection both within this Diocese and across the wider Catholic education sector. In response, a range of tools and oversight mechanisms have been developed - and continue to evolve - to support strong, collaborative relationships between Dioceses and Trusts, and to provide a means of managing potential misalignment effectively. Within this Diocese, these measures include the use of Annual General Meetings (AGMs), the MAT Evaluation Matrix (MEM), and regular engagement with Education Service officers. In addition, ongoing support includes formation and training for Directors, the continually evolving suite of updated protocols and policies, and a commitment to ongoing dialogue. These structures aim to ensure that Trusts remain aligned with the Catholic mission and the Diocese and that any issues can be addressed constructively and proactively.

Next Steps

As Catholic education adjusts to the new realities of an academised landscape, there will inevitably be required a period of consolidation and review. The old systems no longer fit so well, and new opportunities – and challenges – begin to emerge. Some of these may be relevant to the Diocesan-level working, however others may be regional or national scope, giving us opportunity to work more closely with colleagues in our sister Dioceses. Some of this work is already taking place, and there is greater collaboration between colleagues across Dioceses to identify ways of leveraging the opportunities presented through the academy system, particularly in the areas of formation and training.

At the local level, this changed system also impacts the way that we engage with governors, with schools, with Trusts, and with external stakeholders such as the Local Authorities, Ofsted and the Department for Education. We will need to continue to review our protocols and expectations in these areas, bringing clarity to roles and responsibilities, communications, protocols, and reporting. Some of this work can be pre-planned and is already underway, whilst some of it is evolving with experience.

In relation to the academisation strategy, our priorities for the forthcoming period are outlined below.

Completed conversions

Schools will be supported to complete the academisation process by the deadline of July 2026. Where this deadline is not met, there will be enhanced engagement with schools to explore the obstacles to academisation and to support schools to identify solutions as a matter of urgency.

In the Mater Christi cluster of schools, the original deadline will be extended as a new strategy is developed taking into account changed contexts. The pause on growth, alongside changes to conversion grant funding, means new schedules for conversion must be considered. This work is underway, and an updated strategy will be published in due course.

Consolidation

A period of consolidation will provide valuable space to strengthen and refine the systems required for this evolving educational landscape. This will involve not only updating existing documents that govern ways of working but also identifying and integrating new opportunities into the wider scope of Education Service operations. Key priorities will include the revision of documents such as the protocols, the development of updated terms of reference and working agreements for collaborative groups (e.g. Directors of Governance and Directors of Catholic Life), and the continued refinement of schemes of delegation. These efforts will support greater consistency, clarity, and mutual understanding across all areas of our shared work.

Directors

Finding Directors for our Trusts, with the right mix of skills and experience, is a key strategic priority. We will be developing a strategy for identifying new Directors, taking into account the need to develop succession planning to ensure consistency and sustainability, as well as reviewing our training offer to ensure we have suitable formation opportunities for Directors and governors.

Training

As the MAT system continues to evolve, we recognise the need for our traditional training model to adapt accordingly. This includes exploring how we might harness the capacity within MATs to deliver high-quality training, while also addressing gaps in provision for roles not previously accounted for—such as members of the MAT executive team or central services staff, some of whom may be new to Catholic education. In addition, we will consider how best to support staff now working across multiple schools. Whereas leadership pathways were once predominantly hierarchical, we are now seeing an increasing number of individuals taking on cross-school roles as a step toward headship. We will therefore explore how appropriate formation and support can be provided in these emerging contexts, including areas for collaboration with our sister Dioceses to provide high level training support.

Succession planning

This will also include working with MATs to develop succession plans, both for schools and executive officer roles, and to explore how we can develop a more integrated approach to identifying future leaders and give them the support they need to progress into leadership.

Oversight and accountability

As discussed above, we have started to establish clear oversight and accountability relationships with our Trusts. Our ongoing priority is to further embed and refine these processes, ensuring they are robust, transparent, and effective in enabling the Education Service to carry out its oversight responsibilities on behalf of the Bishop.

Cross Trust working and consistency

We will continue to support our Trusts in identifying ways for effective cross-Trust working where this enhances the capacity and provision of each. Key areas for this work include procurement, training and formation, and identification of expertise in specific areas of operations.