# Implementing the Bishop of Lancaster's Vision for Academisation\

1 September 2021



## Introduction\

The Bishop invites all schools in the Diocese of Lancaster to form multi-academy trusts (MATs) to protect, secure and develop the Church's mission in education in the Diocese. His reasons for desiring this shift in educational policy in the Diocese were outlined in his letter of 14th September 2020. Please find the letter in the appendices.\

This document intends to provide a practical outline of how this process may come about over the next few years. It replaces all others versions and consultation documents regarding the academy strategy. The Bishop has expressed his desire for schools to be in MATs by the close of 2026, the ongoing and all-consuming challenges the pandemic presents to schools may impact this timescale\

The Bishop and Trustees published a proposed Academy Strategy in January 2018. The strategy came from a working party, established by Fr. Luiz Ruscillo in 2016, composed of teachers, parents and governors. The Education Service produced an FAQ document and model academy documents to go alongside the strategy. The proposed plan went to consultation through regional meetings with schools, parish priests and pastoral councils. The findings from the consultation went to the Trustees, and a revised strategy document developed. What follows are the steps to begin implementing the revised strategy.\



Coat of Arms of the Diocese of Lancaster

The Church offers its educational service to "the poor or those who are deprived of family help and affection or those who are far from the faith "(GE). Since education is an important means of improving the social and economic condition of the individual and of peoples, if the Catholic school were to turn its attention exclusively or predominantly to those from the wealthier social classes, it could be contributing towards maintaining their privileged position, and could thereby continue to favour a society which is unjust. \

The Congregation for Catholic Education 'The Catholic School' 1977

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### e Process

The Bishop anticipates that all schools in the Diocese of Lancaster will progress towards forming and joining multi-academy trusts by the close of 2026. The Bishop and Trustees feel that this ensures that Catholic education will remain 'visible, tangible and conscious' across the Diocese in the coming years.

The timeframe to convert will be determined by how ready schools are to convert. An 'academy ready' checklist is attached, which asks schools to identify a timeline for their conversion.

Moving to multi-academy trust status is a change, a step into unfamiliar territory for many educators. Therefore, the process begins not by imposing change but instead encouraging those who regard academisation as an innovative, solution-focused opportunity. It allows them to develop new approaches that are sustainable and reproducible for others to follow.

The Diocese of Lancaster Education Service must secure educational improvement for all our children who deserve to attend good schools. As Catholics, we should look to offer those who are most in need our best teachers and resources. Education has the power to transform lives and should enable children to flourish.

Learning from the Mater Christi pilot project, we will begin to establish the Preston MAT and to grow BEBCMAT with a group of willing schools. Following this approach means that those who see academisation as an opportunity can move forwards. Allowing innovators to lead means that the change is positive, convincing and built on a coalition of the willing.

Using this model still allows for the development of three MATs over time following the academy strategy approved by the Trustees of the Diocese. However, it also allows educators to look at what they have in common beyond geography and connect ideas around building Catholic schools for the twenty-first century.

All schools will progress towards academisation at different rates. The aspiration remains 2026.

Congregation for Catholic Education 'Educating to Intercultural Dialogue in Catholic Schools Living in Harmony for a Civilisation of Love (2013) 57

## \ne Mater Christi Pilot Project

The objective of this pilot was to identify a way to put together a Multi-Academy Trust (MAT) in the Diocese of Lancaster within the academic year 2019-20. Change management processes suggest that the best way to embrace change is through beginning with those who see it as an opportunity. This led to a revision of how we will build the MAT structures in the Diocese. Because of the pandemic and the strains, this placed upon capacity focus on an academy application, the time scale for establishing the MAT moved to the academic year 2020-2021.

#### Goals

- 1. To secure Catholic educators to develop a MAT in Cumbria who understand the distinctive nature of Catholic education.
- 2. To provide school to school support for those who are experiencing difficulty from within the Catholic sector.
- 3. To put our best resources to those in greatest need, particularly schools in a limiting OfSTED category.

#### \nlution

Rather than beginning with geography, develop a coalition of educators who will work together to establish a Catholic MAT across Cumbria that will deepen the Catholic identity of the schools in the MAT and reach out to those in the greatest need. The Church's should place the best educational resources to benefit those facing the most disadvantages.

#### **Project Outline**

Four schools in south Cumbria said that they would work to form a MAT. Other schools across the county were invited to express an interest in joining this MAT. Three other schools agreed to join the MAT, and work began on putting a bid together. Coinciding with this, the DfE approached us about becoming part of a pilot project to support new MATs as they are established. An application was submitted to the Head Teacher Board (HTB) and Regional Schools Commissioner in March 2021 to form the MAT with sponsorship capacity to wrap around St. Joseph's primary school in Lancaster.

#### **Lessons learned**

- i) The pilot project enables the Education Service to talk to other dioceses about what helped them move schools into academy trusts. We now have a partnership with AVEC who offer professional support from the outset around all the areas schools need to address to become academies, including due diligence and TUPE (Transfer of Undertakings Protection of Employment).
- ii) At the outset, it is important to have a project team which includes those who will take on governance roles, leadership roles and school business management. The project has to be led by the schools who will be part of the Trust as they have the expertise. The project works best when it is 'done with' rather than 'done to'.

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- iii) It is helpful for all schools at the start of the process to set some boundaries and set clear expectations about what is expected from whom. AVEC supported this with a simple Memorandum of Understanding.
- iv) It is good to have a clear timeframe with a long lead in so that any unknowns around areas such as land or leases can be addressed well before conversion takes place. The timeframe must be realistic and shared with all involved.
- v) Communication with local governors about what their role is going forwards and building in training about the scheme of delegation needs to happen as the MAT is being set up.
- vi) At least five foundation directors should be identified very early in the project to ensure good governance from the outset.
- vii) The schools who agree to take the lead need to have some internal capacity to release the head or school business manger to do some work to establish the Trust. It takes time and energy!

## **\nowing Mater Christi - The Regional Hubs**

Before the pilot work began, financial modelling for the working of each MAT revealed that the South Cumbria/North Lancashire area had fewer Catholic schools and fewer learners as a consequence. Had the original academy strategy been pursued, a structural inequality between the MATs of the Diocese would have developed. Conversation with other Dioceses around the plan suggested that we needed to consider the number of learners in each MAT rather than the number of schools. A better option to pursue in the region was a hub system. The MAT would grow as one Trust Company, enabling MAT schools to benefit from economies of scale and shared services where possible, but have regional hubs to support more localised school development, school support, and school improvement. Using this model enables the MAT to grow across Cumbria and creates a home for schools that require improvement across the county.

The pilot project began with seven schools in Cumbria and one directed Academy Order (dAO) school in Lancaster. Over the next five years, the intention is to grow this MAT to develop the size and stability of the whole MAT while building the capacity for the school to school support initially in Cumbria. All the schools in the Diocese will be working to become academy ready running alongside this.

The following list is indicative of how the MAT will grow but may have to be modified as Red, Amber, Green (RAG) ratings are received. It is a suggested progression but may be subject to change dependent on school improvement needs at the time.

**Year One:** Five other primary schools join the MAT blended from Barrow, Workington and Carlisle city.

**Year Two:** Remainder of schools in Barrow, Carlisle area, and Workington join the MAT. (Schools in other areas of Cumbria are not precluded from being part of this phase to a maximum of ten schools)

**Years Three & Four:** Remainder of Cumbrian schools join the MAT. The Northern hub is then complete. The MAT then has around 7,500 learners.

Years Five & Six: Lancaster schools join the MAT. The Southern hub is then complete.

#### **Governing the Regional Hubs**

Each regional hub will have a representative board drawn from the schools. The members will be headteachers and Chairs of Local Governing Bodies from the schools in the region. It is envisaged that this will be an elected group of twelve members from the schools with a four-year term of office. The MAT Board may choose to delegate some decisions to this board under a revised scheme of delegation.

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# **Mater Christi Multi Academy Trust**

#### **Southern Hub South Cumbria**

729
60
98
125
191
197
165
220
231
195
2211

#### **North Lancashire**

Our Lady's	818
St. Patrick's	193
St. Mary's, Morecambe	183
Our Lady of Lourdes	100
The Cathedral	186
St. Joseph's	209
St. Bernadette's	210
	1899
Total Learners in Southern Hub	4110

Northern Hub		
St. Benedict's	1070	
St. Begh's	270	
St. Gregory's & St. Patrick's	290	
St. Patrick's	246	
St. Mary's Kells	214	
St. Bridget's	204	
St. Joseph's Frizington	76	
St. Joseph's Workington	693	
St. Patrick's	210	
St. Gregory's	225	
Our Lady & St. Patrick's	204	
St. Mary's, Harrington	156	
St. Joseph's, Cockermouth	30	
St John Henry Newman	525	
St. Cuthbert's	99	
St. Margaret Mary's	235	
St. Cuthbert's Wigton	97	
St. Bede's	228	
St. Catherine's	133	
	5205	
Total number of learners in the MAT	9315	

# \nveloping the Preston Area MAT Mater Ecclesiae

All schools in the Preston area will complete the Academy ready evaluation. The list of schools that will be in this MAT is on the next page. Using the lessons learnt, the schools will follow the Mater Christi model of beginning with the willing schools and then growing outwards. Preston is a growing town, and information from place planning shows that some of our schools are in an area where new housing is already creating a high admissions demand.

**Phase one:** Schools who wish to be in the first wave of conversions will begin applying to form a MAT submitting to the Regional Schools Commissioner in the Spring Term 2022. An application to the Regional Headteacher Board in January or February allows enough time for a MAT to be established by 1st September 2022. To be successful in this application, the group of schools in the first group need to demonstrate robust school improvement capabilities and be on a sound financial footing. Schools with a deficit or an RI judgement may still be able to join this group but will need to demonstrate firm improvement plans.

**Phase two**: Five additional schools join, beginning their application anytime after September 2022 to join the MAT no later than 1st September 2023

Phase three: Five other schools begin their application anytime after September 2023

to join the MAT in the academic year 2023-24

Phase four: 2025 - 2026 Remaining schools join the MAT

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# **Mater Ecclesiae Multi Academy Trust**

Preston Area Schools		
St. Mary's Lea Town	105	
SS. Mary & Andrew, Barton	124	
SS. Mary & Michaels'	100	
St. Mary's Claughton	35	
Alston Lane, Longridge	227	
St. Francis	106	
Our Lady's	896	
St. Bernard's	215	
Our Lady and St. Edward	212	
Holy Family	189	
St. Anthony's	319	
Corpus Christi	595	
St. Gregory's	209	
St. Maria Goretti	217	
St. Clare's	253	
Blessed Sacrament	404	
Christ the King	323	
St. Ignatius	184	
English Martyrs	228	
Sacred Heart	189	
St. Joseph's	358	
St. Teresa's	183	
St. Augustine's	248	
Total number of learners	5919	

# Developing the Fylde Area MAT Blessed Edward Bamber \

The Multi-Academy Trust for Blackpool and the Fylde Coast areas will grow from the existing Blessed Edward Bamber Catholic Multi Academy Trust.\

**Phase one:** will involve BEBCMAT preparing its structures to grow by establishing Local Governing Bodies for its existing schools. BEBCMAT also needs to look at the sponsorship capacity of the Trust. The Trust has begun to recruit directors from across the Fylde coast. \

**Phase two:** The Trust will meet with schools individually to develop positive working relationships and a greater understanding of academies. The Trust will create a working party that will involve heads and governors from the Fylde coast MAT area who will join the Trust in the first round. This working party will enable all parties to work in partnership to develop how the Trust will continue to develop. The group will meet in the Autumn term of 2021 onwards. \

**Phase three:** Schools in the Fylde will begin to convert to join the MAT across the time frame in line with the Bishop's vision of all schools becoming academies by 2026. \Recognising that there are nineteen schools to convert, five schools each year would seem reasonable between 2022-2026. \

Some of our schools along the M55 corridor are experiencing pressure around places. As housing develops in the area, it is increasingly likely that more school places will be needed. Academisation gives our schools greater freedom around admissions and to grow places where required.

# **Blessed Edward Bamber Multi-Academy Trust\**

Fylde Coast Schools		
St. Cuthbert's*	235	
Christ the King*	242	
St. John Vianney	443	
St. Bernadette's	207	
Holy Family	207	
St. Teresa's	200	
St. Kentigern's	209	
Our Lady's	204	
St. Mary's*	1199	
Cardinal Allen	799	
St. William's	26	
St. Mary's Gt. Eccleston	26	
St. John's	205	
Sacred Heart. Thornton	212	
St. Mary's, Fleetwood	147	
SS. Wulstan & Edmund	288	
St. Bede's High	818	
The Willows	203	
St. Joseph's, Wesham	97	
Holy Family, Warton	115	
St. Peter's	207	
Our Lady Star of the Sea	208	
Total number of learners	6497	

<sup>\*</sup> already academy schools

# Appendix 1 - Bishop's Letter



The Rt Rev Paul Swarbrick Bishop of Lancaster The Bishop's Office, The Pastoral Centre, Balmoral Road, Lancaster LA1 3BT ① (01524) 596050

14th September 2020

Dear Brothers and Sisters in Christ,

For nearly two centuries, following the relaxation of laws against Catholics in our nation, our Catholic schools have been the bedrock of our mission to make Jesus Christ known and loved in our communities. They have formed an essential part of our wider contribution to the Common Good of society. The past few months have highlighted particularly just how vital our schools are and how their work and witness reveals the presence of Jesus Christ in our communities. When our Churches were unable to be open, our schools remained proactive in feeding the hungry, providing care and concern for the most vulnerable, and assisting key-workers in their important role during the Covid pandemic. I thank all those who work in our schools for their endeavours throughout this period not only in their task of education but also by the way they have supported the wider communities in which they serve.

Our schools are an integral and vital part of the Diocese of Lancaster's mission, now and going forwards. In a Catholic school, every child is welcomed, valued, and respected, and the person and teachings of Jesus Christ form the foundation of the school's life and activity. The Gospel values of love, truth, justice, forgiveness, which embraces special care for the vulnerable and those in need will be evident. In a Catholic school, our aim is that every child, whether Catholic or not, will be respected, affirmed, supported, and encouraged to reach their full potential, which for us is life in Christ Education is a potent weapon in combating poverty. Our Catholic schools are places where young people learn how to be of service to the world, not only as workers but as citizens.

Pope Benedict said when he addressed the children of our nation at Twickenham "A good school provides a rounded education for the whole person. And a good Catholic school, over and above this, should help all its students to become saints. Non-Catholics too will feel encouraged to practise virtue and to grow in knowledge and friendship with God alongside their Catholic classmates. Respect and friendship for members of other religious traditions should be among the virtues learned in a Catholic school."

To help our young people to flourish, the Catholic life of a school must go beyond the mere teaching of RE, encompassing the way everyone relates to each other in a spirit enlivened by the Gospel's call to love God and our neighbours. Our Catholic schools are crucial to the life of our Diocesc in announcing the Gospel to the world and are able to do this in ways that parishes alone would find difficult.

Lancaster Roman Catholic Diocesan Trustees Registered Charity Number 234331

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A Catholic school is not just a building; it is a community, and those who form this community and participate in it cultivate this place of human growth. Over the years, our forefathers fought hard to establish and maintain Catholic Education in these lands. It is our turn to ensure that Catholic Education is maintained and enabled to grow and develop for future generations particularly through greater collaboration between individual school communities.

To this end, I invite our parishes and schools to build Catholic Multi-Academy Trusts across the Diocese. Through these local families of schools I seek to protect, secure, and develop the Church's mission in education. This critical step forward for Catholic education in our Diocese, seeks to ensure that every school sits within a network of collaboration so that each institution both gives and receives support. The reality is that Catholic schools must collaborate, viewing other Catholic schools as equal partners. Recognising the increased powers of intervention in struggling schools from government agencies, as Bishop, I am aware that we need to place secure structures around vulnerable schools to help them improve and flourish. If we do not act proactively, we become reactive to circumstances rather than guiding and controlling change.

The move to establish a network of Multi-Academy Trusts in the Diocese seeks to ensure that Catholic schools work closely together. Isolation will compromise the Church's mission in education and put at risk the provision of places of education for our families. The academisation process will enable transparent working relationships to be developed between local Catholic schools to assist with school improvement, leadership recruitment, formation, governance, and co-operation to strengthen our Catholic mission. This development moves beyond existing partnerships or federations to enable a new spirit of collaboration where the success of Catholic schools in our Diocese can remain productive and protected.

Initially, I am inviting schools in Cumbria to come together to form a Multi-Academy Trust. I want this to be a coalition of willing and innovative headteachers and governors who see this as an opportunity to benefit our Catholic education, a further our mission going forward. Over time, I would like all schools across the Diocese to move towards the previously published academy strategy but I want this to begin with those who recognise academisation as an opportunity. When the Cumbria Multi-Academy Trust is developed, I will ask the schools in the Preston area to move to academise. On the Fylde coast we will seek to develop and expand the existing Multi-Academy Trust.

With an assurance of my continued prayers and blessing,

+Paul Swarbrick

Bishop of Lancaster

+ Paul Snereint

# \npendix 2 - Checklist

Thank you for taking time to complete this information for the Education Service.

When completed, please return the form to Heather Watts hew@lancasterrcdiocese.org.uk

Date of last Ofsted Inspection and grade:

Name of School:

Name of Concol.
Address:
Head teacher:
Chair of Governors:
Main contact email for academy conversion related matters:
Date of last Section 48 inspection and grade:

Please complete the attached checklist to inform the Bishop and Trustees about where your school is in terms of being 'academy ready'. Your answers to these questions do not constitute a commitment to a timeframe for academy conversion but will enable the Education Service to suggest a realistic timescale to the Bishop and Trustees.

Though there is room to comment about each area, this is not necessary unless schools feel a comment is useful to give context to answers. It is intended to use this as a simple 'ticklist' that will only take head teachers and governors a little time to complete, as much of the information is readily available.

Coding: Please tick **RED** if this is an area that requires substantive work, **AMBER DARK** if it requires improvement, **AMBER LIGHT** if it is good though still has scope for improvement and **GREEN** if it is a real strength of the school.

	RED	AMBER DARK	AMBER LIGHT	GREEN
Part One: Vision and Mission				
Does the school have good quality, practical and achievable improvement plans for Religious Education, Collective Worship and the Catholic life of the school, especially for those areas which were subject to recommendations in the last inspection?\ In summary, is the school making good progress since its last S48 inspection?				
Comment:\				
Part Two: Self Evaluation \ Using the present school SEF ratings, please give a summative view of school gradings for each of the following areas.				
Leadership and management				
Outcomes for Pupils				
Teaching and Learning				
Personal Development, behaviour & welfare				
Comment:\				
Part Three: Assets, finance and leases				
The three year building maintenance programme and identifies areas of high, medium and low priority for maintenance and for adaptation to improve teaching and learning.				
The arrangements with other groups for using school premises are formal and written agreements are in place that state the terms of use for using school premises and state responsibilities for damage, cleaning, etc.				
Arrangements with the local Parish for shared use of land or buildings are documented and agreed by both parties, where appropriate.				
The schools asset register is updated annually or when new assets are acquired.				
Contracts and leases with external providers are reviewed and the terms and length of each contract or lease are monitored by the Governance Committee responsible for school finance. This includes software licences.				
Any historic debt is identified.				
Plans are in place to rebalance any budget deficit. (Please note in the comments box if deficits are a result of COVID spending)				
Comment:\				

Part Four: Audits		
All governors complete an annual update of the Catholic Education Service skills audit.		
New governors are recommended for appointment based on identified needs in the skills audit, as far as is possible.		
Training is offered to all governors based on the skills audit.		
All governors attend at least one training event in their four year term of office.		
A register of governor business interests is kept up to date		
The Education Service receives up to date information about names of foundation governors and is always involved in the appointment and reappointment of foundation governors.		
Appraisal process for the head and members of staff are robust and form the basis of ongoing CPD.		
CPD is provided for and approved as part of the school budget by the Full Governing Body.		
Part Five: Networks		
Communication with parents/carers is well managed and there is a forum for parental contributions		
Links with the Parish(es) the school serves remain at the heart of the school's collaborative networks		
The school works in partnership with other Catholic schools in the MAT they will join in some areas of school life, particularly to improve teaching and learning		
The school works collaboratively with other schools to improve teaching and learning and to develop links with the local community.		
Comment:\		
Part Five: Other areas		
All staff are aware of their right to join a trade union.		
All staff have access to information about their pension rights and responsibilities.		
Groups to be consulted in the event of a MAT conversion are known.		
Comment:\		

Please add any additional comments below:\  Name of school:\  The governors propose that the school will be ready to covert in			
	Please add any additional comments below:\		
The governors propose that the school will be ready to covert in	Name of school:\		
The governors propose that the school will be ready to covert in			
	The governors propose that the school will be ready to covert in		

# \npendix 3 - Summary of key delegated governance responsibilities

Members	Directors/Trust Board	Members of Local Governing Board
determine constitution and religious character oversee the Directors recognise any strategic partnerships delegate governance and management responsibility to the Directors (formally appointing and removing the Directors where necessary)	<ul> <li>hold governance accountability</li> <li>determine strategic vision and overarching strategic plan</li> <li>provide strategic leadership and governance</li> <li>provide challenge and support to senior leaders undertaking the recruitment and performance of any chief executive officer</li> <li>develop and decide strategic and operational policies</li> <li>facilitate collaboration</li> <li>co-ordinate and oversee shared services and resources</li> <li>develop and oversee the implementation of Trust development plan</li> <li>approve of performance benchmarks</li> <li>approve overall Trust budget and advise on School budgets</li> <li>monitor expenditure in accordance with appropriate authorisations</li> <li>oversee financial governance and risk management</li> <li>determine the Trust's reserves/ contingency policy</li> <li>ensure appropriate insurance or risk cover is put in place</li> <li>undertake recruitment of headteachers and facilitate the performance management of senior leaders</li> <li>develop shared staff training programmes and opportunities for professional development</li> <li>support the development and building of leadership and governance capacity at School level approve of site and asset management strategy</li> <li>oversee any significant capital expenditure and building projects</li> <li>approve of all funding applications</li> <li>decision maker for all appeals</li> </ul>	decide the School's strategic vision and uphold the School's distinctiveness and unique character, in harmony with the Trust's strategic vision and ethos support senior leadership team generally and with specific emphasis on target setting, pupil monitoring and analysing progress data to inform curriculum & budgeting priorities approve of School development/action plan approve of School budget and support the head teacher in submitting the budget to the Trust Board for formal approval approve any significant capital expenditure oversee expenditure ensuring the School works within its budget and implements the Trust's risk and financial management policies ensuring probity, prudence and efficiency play an active part in the recruitment of the headteacher support the senior leadership team in the development and review of an appropriate staffing structure support the head teacher in the recruitment and performance management of personnel responsible for staff welfare and wellbeing, supporting the senior leadership team in monitoring absence and sickness promote collaboration with other schools in the Trust develop and review delegated school policies (e.g. admissions, pupil behaviour, safeguarding) provide advice and feedback to the Trustees, ensuring the School is meeting the needs of its community undertake all and any appropriate community consultation provide a point of contact for parents, carers and other members of the local community, maintaining an effective link to the wider community evaluate its performance ensuring appropriate training and development so that knowledge, skills and behaviour are appropriate for a dynamic education environment