

Potential Benefits and Perceived Challenges of Joining a Catholic Multi Academy Family

1. Context and Purpose

This document provides an indication of the potential benefits and perceived challenges for schools joining a Catholic MAC family. It has been produced as part of a range of information in relation to the Vision for Education and Multi Academy Strategy within the Archdiocese of Birmingham and follows significant dialogue and feedback with stakeholders. It should be read in conjunction with the document entitled **Archdiocesan Vision for Education and Multi Academy Strategy: Aims**. It is not exhaustive and nor does it seek to address all of the perceived challenges and risks raised to date. It is by working together co-responsibly that we can best achieve the potential benefits and address the perceived challenges related to our vision and the multi academy strategy being pursued.

2. Joining a MAC: Benefits and Challenges

While there is a range of anecdotal information on the benefits and challenges of joining a multi academy trust, the significant diversity of sizes and structures of multi academies together with the relatively recent development and growth within the sector has made it difficult to compile longitudinal empirical research and comparisons. In July 2019, however, Ofsted published an



Multi-academy trusts: benefits, challenges and functions

An investigation into multi-academy trusts: how their central vision and approaches influence day-to-day practice in schools, and to what extent they are having a positive or otherwise impact on the work of leaders and teachers in the schools we inspect.

'investigation' into multi-academy trusts entitled *Multi-academy trusts: benefits, challenges and functions*¹. While the diversity of trusts was emphasised, the report highlighted a range of benefits to being part of a MAT (aligned with previous research on the characteristics of an effective MAT), including covering areas such as back-office support; economies of scale; challenge and support; and collaboration, sharing data and expertise. Drawbacks were also identified in areas such as financial arrangements; centralisation and loss of decision-making power, slow decision-making in centralized structures, pressure for growth, and sharing good practice not always done efficiently and effectively.

During the Covid pandemic there has been further research that has strengthened a number of the identified benefits of being part of a family of schools. One piece by Muijs and Sampson, *The trust in testing times*, highlighted benefits in the areas of safeguarding and managing Covid guidelines, remote learning and curriculum and collective learning.²

The trust in testing times: the role of multi-academy trusts during the pandemic



In 2021, an independent social and market research agency, IFF, undertook research on behalf of the Department for Education and published in November a research report entitled, *Schools' views on the perceived benefits and obstacles to joining a multi-academy trust*³. This research was based predominately on surveying **headteachers** (though a small number of governors were also surveyed). Respondents were asked separately their reasons for joining a

¹ Ofsted, 2019. *Multi-academy trusts: benefits, challenges and functions* report available at https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/936251/Multi_academy_trusts_benefits_challenges_and_functions.pdf

² Muijs and Sampson, *The trust in testing times: the role of multi-academy trusts during the pandemic* (January 2021), <https://educationinspection.blog.gov.uk/2021/01/19/the-trust-in-testing-times-the-role-of-multi-academy-trusts-during-the-pandemic/>

³ DfE, 2021. *Schools' views on the perceived benefits and obstacles to joining a multi-academy trust*, <https://www.gov.uk/government/publications/schools-views-benefits-and-obstacles-to-joining-academy-trusts>

MAT, the benefits they thought they would gain, with recent converters being asked the benefits and downsides experienced as a result of joining. The research also segments responses by primary and secondary schools. The most significant benefits expected were “greater collaboration, including sharing of skills and expertise across different schools in the MAT” together with “improved outcomes for pupils” followed by “the quality of school leadership,” “cost savings and efficiencies,” and “improved sense of direction and purpose.” The improvements experienced did predominately align with those expected (with primary schools identifying in addition following joining a MAT improving training for staff). Those schools who recently converted to a MAT also were asked what the ‘negatives or downsides’ were (if any) of joining a MAT. There were no negatives expressed by 38% of primaries and 23% of secondaries. For primaries and secondaries who did express such negatives or downsides these were in summary as follows:



Schools' views on the perceived benefits and obstacles to joining a multi-academy trust
Research report

November 2021
IFF Research



Primaries who recently converted	Secondaries who recently converted
<ul style="list-style-type: none"> ○ Difficulty adapting to new procedures and processes (19%) ○ Increased workload (18%) ○ Reduction in autonomy (16%) 	<ul style="list-style-type: none"> ○ Reduction in autonomy (16%) ○ Reduced control over finances (18%) ○ Taking longer to get things done (12%)

The report includes in its conclusions that:

“Most schools that had chosen to form or join a MAT in the last three years felt that converting had a positive overall impact on their school. Only one in twenty felt the overall effect had been negative.”

It also states, “That said, most recent converters did find the process of converting and adapting to their new status challenging.”

Set out in Appendix 1 is a summary of the main benefits and challenges of joining a Multi Academy Company that have been identified to date within the Archdiocese. While it recognised that it is not an exhaustive list, further to review of sector research and information together with ongoing dialogue and feedback, it is felt that the opportunities to achieve the benefits identified here and elsewhere outweigh the potential risks, challenges and perceived barriers; particularly when taking into account our shared mission and Catholic values. The ambition is to work together to identify the various risks and challenges and smooth them as far as possible in pursuing the multi academy strategy in the Archdiocese. This work sets out to deepen the mission of the Church, offering young people with an excellent education and providing them with a solid Christian formation in the light of the Gospel.

3. Summary and Next Steps

Increasingly, the sector has been identifying and developing the key characteristics of an effective Multi Academy Trust. The Confederation of School Trusts (CST), for example, has recently released in January 2022 a report as part of their [White Paper Series \(cstuk.org.uk\)](https://cstuk.org.uk) entitled *What is a Strong Trust? A CST discussion paper*.⁴ This follows the publication of a book in 2020 by Sir David Carter, former National School Commissioner, (together with Laura McInerney) entitled Leading Academy Trusts, why some fail but most don't. Also, the DfE has

⁴ CST, What is a Strong Trust? A CST discussion paper, January 2022: <https://cstuk.org.uk/policy-research/cst-white-paper-series>

published a MAT Assurance Framework⁵ and related guidance to aid strengthening and growing the multi academy's capacity for school improvement.

While there is a growing body of research and information – highlighting both the benefits and challenges of joining and maturing within a family of schools in a multi academy - this is secular in nature and does not take into account the mission of Catholic education nor the values which would inform our structures and how we implement and operate within our multi academy families as well as collaboratively within our Archdiocese family. The multi academy or 'MAC' framework is a legal vehicle which supports long-lasting and structural partnerships, however, it in itself is not a panacea that will achieve our shared mission. The BDES will, in the coming weeks, work in partnership with key stakeholders across the Archdiocese, building on and adapting current frameworks such as those as set out above, to further clarify and articulate the key characteristics of a family of schools within a **Catholic** Multi Academy Company in the Archdiocese of Birmingham to ensure the implementation of the multi academy strategy aligns with our mission and best enables our vision for education to be achieved⁶.

As at 17 March 2022

⁵ <https://www.gov.uk/government/publications/multi-academy-trusts-establishing-and-developing-your-trust>

⁶ A Catholic multi academy as opposed to a secular trust has embedded in its articles an express charitable object as follows: “the advancement of the Catholic religion in the Diocese by such means as the Diocesan Bishop may think fit and proper by, but without prejudice to the generality of the foregoing, the establishing, maintaining, carrying on, managing and developing of Catholic schools in the United Kingdom conducted in accordance with the principles, and subject to the regulations and discipline of the Catholic Church.” This is an important feature which provides legal protection to preserve the Catholic ethos of the schools and their accountability to the Archbishop.

Summary of Potential Benefits and Perceived Challenges

	Potential Benefits	Perceived Challenges
Catholic Life and Mission	<p>Protecting and Securing Catholic education and schools: all schools coming together within a multi academy family of schools within the larger Archdiocesan family supports the common good more effectively and enhances resilience – making sure that Catholic education provision in all parts of the Archdiocese can be retained [No school community should be left isolated or at risk.]</p> <p>Enhancing the support for the vulnerable and disadvantaged: ability to allocate resources to areas of greatest need, ability to engage expertise MAC-wide in relation to formation, SEND, disadvantaged, behaviour, mental health and wellbeing, etc. [In the light of the impact of the pandemic, there is a particular urgency for schools to work together to produce solutions that a single school cannot do alone.]</p> <p>Development and enrichment of Catholic Life (and chaplaincy) at a larger scale: directors, governors and senior leaders collectively coming together for retreats / formation and ensuring opportunities for staff and pupils to do so as well; enhanced chaplaincy and Catholic Life and Mission work across schools with greater impact than can be achieved within one school</p> <p>Identifying and developing the next generation of Catholic leaders and encouraging their vocation, exposing aspiring leaders to leadership expertise within the MAC and development of appropriate formation, induction and training, embedding it within the local context, preparing them for leadership within a Catholic School as well as wider systems leadership</p> <p>Ability to create stronger, sustained links between schools, home/parents and parishes and alignment with Archdiocesan vision and plan and the mission of the Church</p>	<p>Loss of individual school identity / ethos and reduction in the ability to serve the specific school/parish community</p> <p>Imbalance between solidarity and subsidiarity, with too much control and decision-making at the ‘central’ and ‘Board’ level of the MAC rather than within individual schools</p> <p>Local schools not able to support the charities their pupils / staff wish to through fundraising</p> <p>Parish priests having reduced engagement within the school</p>

	<p>Greater collective ability to engage in and have impact through social action and fundraising</p> <p>Provision of an education system rooted in the principles of Catholic Social Teaching and social justice including solidarity, subsidiarity, belonging, connectedness and the common good (replacing emphasis on personal individual autonomy)</p>	
	Potential Benefits	Perceived Challenges
Teaching and Educational Standards	<p>Innovation in a diverse and enriching curriculum, tapping into a wider range of expertise and sharing best practice across the multi academy family, together with integrated curriculum planning between primary/middle/secondary results in improved transition, progress and attainment</p> <p>Improvements in class teaching as a result of greater access to CPD and shared enterprise across the MAC</p> <p>Smoothing and Increasing Transition (3-19): familiarisation of pupils between schools and different stages increases likelihood of pupils staying in Catholic education and smooths the transition experience, increasing wellbeing and progress/attainment for pupils</p> <p>Broader range of enrichment and extra curricular experiences available for pupils</p> <p>Reducing workload and increasing effectiveness for teachers and senior leaders</p> <p>Shared Staffing: increasing opportunities for staff development and also ability to deploy staffing expertise according to greatest need</p>	<p>Too much consistency in curriculum implementation and/or related policies which could hinder innovation and reduce ownership of accountability for progress of pupils by teachers locally</p> <p>Greater incidence of 'losing' good staff to other schools</p>
Strategic Leadership and Management	<p>Leadership Development: Opportunity to develop and retain leaders, including Catholic leaders, through greater and more diverse opportunities and new and emerging leadership models [within the multi academy family and across the Archdiocese]</p>	<p>Alignment of Vision and Strategic Planning: local governors and leaders cannot set independently their own vision and strategic plan; need to engage with and align to the wider vision and strategic planning of the MAC</p>

	<p>Formation / CPD: can be more frequently, effectively and more efficiently delivered across a number of schools and better aligned with our mission and vision</p> <p>Improved wellbeing: enhanced opportunities to engage with other senior leaders across the MAC through formation, training and development as well as distributing aspects of management and compliance workload.</p> <p>Governance Diversity and Increased Capacity: Directors and governors can draw on a wider diversity of skills, expertise and perspectives to ensure strategic planning aligns with vision and mission and serves the common good as well as the range of communities within the MAC</p> <p>Multi Academies as Civic Actors: greater effectiveness in engaging with government, other civic organisations, health trusts, employers, and other external agencies</p>	<p>Loss of 'Power' - retaining enough control at the local school level [decision-making at the level of the local governing body significantly reduced]</p> <p>Diversion of leadership capacity to plan and implement changes</p> <p>'Loss' of the role of Headteacher due to other leadership models being deployed and accountability to the CSEL; school not being able to determine own staffing structure</p>
	Potential Benefits	Perceived Challenges
<p>Operations: Finance, Estates, IT and Human Resources</p>	<p>Enhanced expertise, centralising support functions (where appropriate) and increasing access to specialist expertise and skills in relation to Finance, HR, IT, Estates, as well as educational standards and teaching</p> <p>Greater support in exceptional circumstances: should there be unexpected challenges in a school (e.g. financial, senior leadership), there is a greater capacity to resolve ensuring the Catholic education of the school is protected.</p> <p>Harnessing resources and creating economies of scale: as the MAC can purchase and make service contracts as a whole, purchasing power collectively can be higher than as an individual school – greater value for money can be achieved</p> <p>Enhanced budgetary management and strategic financial planning</p>	<p>Potential inability to allocate resources at local level: individual school leadership / governors not having the same MAC-wide strategic priorities as determined by the Board and potentially not able to deploy resources as they feel best for their individual school</p> <p>Giving the 'MAC' any carry forward/reserves saved by the school for a specific strategic investment</p> <p>Paying the 'MAC' too much out of the schools budget and not spending it to benefit the children in the school [particularly on paying for central team/CSEL]</p> <p>Slower decision making given need to reference different 'layers' of governance and executive leadership</p> <p>Accounting for potential pension deficits</p>

	<p>Strategic Estates Management: estates strategy and maintenance schedules can be planned more effectively over the longer term [NB access to SCA funding]</p>	<p>Financially 'well managed' schools needing to support other financially vulnerable schools</p> <p>Diminishing of terms and conditions for staff</p> <p>Unexpected issues being raised within the due diligence process</p> <p>Schools not permitted to choose local / known suppliers for contracts</p> <p>Not having enough administrative support at local school level as staff have been moved 'centrally'</p> <p>Loss of alignment of school holidays with other local schools and multi academies</p>
	<p>Potential Benefits</p>	<p>Perceived Challenges</p>
<p>Governance, Compliance and Accountability</p>	<p>Enhanced oversight and support: local governing bodies supporting each other and Directors/CSELS supporting local governance, particularly in key areas of compliance and accountability (e.g. safeguarding, PP/disadvantaged, SEND) – provision of training and structures for monitoring and assurance [DES on behalf of Members monitoring and supporting multi academy families and facilitating collaboration]</p> <p>Legal accountability is held (predominately) at Board level, supported by more resilient compliance frameworks, reducing risks at local school level</p> <p>Enhanced benchmarking, moderation and monitoring across the multi academy family improves evidence informed governance</p> <p>Governance Support / Clerking: MACs can secure greater governance support and expertise (e.g appointment of a governance professional)</p> <p>More refined risk management processes – strategically and operationally</p>	<p>Local governors not able to independently set policies for their individual school</p> <p>MAC Board making decisions that are detrimental to an individual school</p> <p>Local governing body not able to retain their existing clerk</p> <p>Conflicts of loyalty / allegiance for those protective of their individual school or position</p>