



The Lincoln Diocesan Strategy for Academisation

‘The Diocesan Strategy’



The Diocesan
Board of Education

**Updated
September 2024**

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*** The Toolkit for MAT and school leaders.**

To accompany this Diocesan Strategy, there is a toolkit containing supporting documents, templates and resources for church schools, academies and MATs.

Introduction

The Diocesan Strategy for Academisation to be known as ‘**The Diocesan Strategy**’ sets out the LDBE’s expectations regarding governance structures within church multi-academy trusts (MATs), relationships with stakeholders, processes including due diligence requirements and provision of consent where applicable.

The Diocesan Strategy for Academisation is required under the Church of England Model Articles of Association. The Articles make many references to the Diocesan Strategy. For example, it states in the Company Object (Article 4), that the ‘[Directors... shall follow any directives from the Diocesan Board of Education...and act in accordance with the Diocesan Strategy](#)’.

The Diocesan Strategy is also required by the **National Memorandum of Understanding (MOU)** between the National Society and the Secretary of State for Education. It states in the Key Principles of this document, ‘[that there is an expectation that Regional Directors \(RDs\) and DBEs will seek to develop a shared understanding of the published Diocesan Strategy and Trust Development Statements, and to work constructively together](#)’

In the publication, ‘[Commissioning High Quality Trusts](#)’ (July 2023) the DfE acknowledges that ‘[individual dioceses will have their own academy strategies. Regions Group work in partnership with dioceses to develop and implement diocesan academy strategies. Regions Group also recognises the statutory requirement for dioceses to consent to the academy conversion of their schools](#)’.

This Diocesan Strategy was formally approved by the Lincoln Diocesan Board of Education (LDBE) on 27th September 2023.

This guidance is reviewed annually, as appropriate, and in line with the national MOU between the National Society and the Secretary of State for Education.

Sections 1 to 3 – The Legal Background

Section 1 - The Powers and Functions of the DBE under the 2021 Measure.

The religious authority for Church of England schools located in the Diocese of Lincoln is the Lincoln Diocesan Board of Education (LDBE). The work of the LDBE is governed by the [Diocesan Board of Education Measure 2021](#). The Measure provides the legal framework within which the DBEs engage and work with Church schools.

It is through this statutory legislation, the DBE is given legal powers and functions, for example:

- a. The LDBE is to provide advice on matters affecting church schools;
- b. The Measure lists the situations in which the governing board and site trustees of a school site must obtain the LDBE’s advice;
- c. The Measure requires those in receipt of LDBE advice to have “due regard” to that advice. This means they would have to demonstrate good reasons for not following it;
- d. The Measure outlines where the site trustees or DBE’s consent is required (e.g. capital works);
 - e. It sets out the circumstances in which a church school must obtain the prior written consent of the LDBE (e.g. prior to seeking an academy order);
 - f. It sets out when and how the DBE may give directions to church schools and trustees and requires those receiving a direction to comply with it (e.g. direct a church school to permit an inspection if there are concerns about the quality or content of Religious Education or collective worship).

The four core functions of the DBE

According to the DBE Measure 2021, the DBE must -

- a. promote or assist in the promotion of education in the diocese that is consistent with the faith and practice of the Church of England
- b. promote or assist in the promotion of religious education and religious worship in schools in the diocese;
- c. promote or assist in the promotion of church schools in the diocese;
- d. promote co-operation between itself and other persons concerned with education in the diocese.

Section 2 - Schedule of legal requirements within the Diocesan Strategy

In accordance to the DBE Measure 2021 and Articles of Association for church MATs, this section contains the circumstances in which DBE must be consulted and the provision for advice, guidance and where applicable written consent is required from the LDBE. The MAT or any person to whom the LDBE gives advice must have due regard to that advice.

1. Applying for an academy order

The school must obtain written consent prior to requesting or acting upon an academy order, and must approach the LDBE as early as possible to discuss the proposal in line with the Diocesan strategy.

2. Governance

- a) The MAT must obtain written consent from the LDBE regarding any amendments to the Articles of Association, changes to the location of any Church Academy, appointment and removal of additional Members, and local governance provisions including the Scheme of Delegation and Terms of Reference for committees, rules and bye laws.
- b) Appointments made at all levels within the MAT governance structure must provide the LDBE with a written undertaking to uphold the object of the academy company.

3. Provision of information

From time to time the MAT maybe required to provide information to the LDBE including, but not limited to, the minutes of meetings and details of insurance provisions as required by the Measure.

4. Directions

- a) The LDBE may give a direction to the MAT
- b) A decision made by the Members contrary to a direction cannot be implemented by the Directors as this would leave the charity in a position of non-compliance with a statutory duty (in this case, to act following a direction under the Measure). For example, where the MAT is considered by the LDBE not to be acting in the best interests of the Church Academy or MAT.
- c) The Diocesan Corporate Member (DCM) may stipulate the appointment of additional Directors where the LDBE considers the standards or ethos of any Church Academy have fallen unacceptably low.
- d) The LDBE has the right to attend a MAT meeting.



5. Admissions

- a) The MAT, as the admissions authority, must have regard to any guidance from the LDBE when constructing faith-based admissions arrangements, to the extent that the guidance complies with the mandatory provisions and guidelines set out in the Admissions Code.
- b) The MAT must also consult with the DCM when deciding how membership or practice of the faith is to be demonstrated.
- c) Church Academies must, as required by the Measure, consult with the LDBE about the proposed admissions arrangements before any public consultation.

6. Significant Change

- a) The LDBE must be consulted regarding the proposed discontinuation or significant change to a Church Academy.
- b) The LDBE must seek consent regarding the acquisition or disposal of school sites including leasehold arrangements and lettings.

7. Capital Works

- a) The MAT must seek consent before entering into any agreement or arrangement in connection with an alteration to or repair of the premises of the school.
- b) The LDBE has determined that a MAT must seek their approval for capital works in Church Academies when the works is costed at £25,000 or over for additions and changes to the existing floor plans of the site. This excludes purchases of portable tangible assets. The threshold also excludes general repairs and refurbishments to the existing fabric of the site building, however LDBE request a end of term summary in a table format of this work. The purpose is to gauge an insight into the conditions of the site and any improvements that reduce the carbon footprint for external reporting requirements.

8. Recruitment

The MAT must seek the involvement and consent of the DCM for the appointment of the Chief Executive Officer and the appointment of any Principal to a Church Academy.

9. Appointments

The LDBE sets out how authority for appointments is exercised including local governance appointments to committees as delegated by the academy trust board.

The LDBE sets out expectations for the appointment process and key considerations for Members when making director appointments to the academy trust board.

10. Obtaining Consent

A chart indicating when a MAT should obtain DBE consent can be found in the MAT Toolkit



Section 3 - The role of the Site Trustees and the Trust Deed

Church of England school sites (including academies) are generally held on educational endowments, known collectively in education law as the 'Trust Deed', which establishes the charitable objects and the purposes for which the site can be used.

The governing documents of the school will reflect those parameters within which the Church school is to be conducted, which must be compatible with the Trust Deed.

The school occupies the site at the will of the site trustees, for the furtherance of the object of the Trust Deed. Control of the site is always retained by the site trustees of the educational endowment and that is reflected in the way in which schools occupy the site on a bare licence (the school has implied permission to occupy the site but does not have any legal or equitable interest in the site).



Sections 4 to 5 – Our Christian Vision for Education

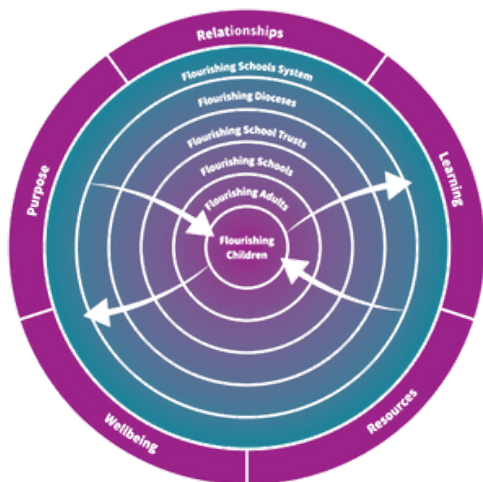
Section 4 - Diocesan Vision for Education - Our Promise to Schools...

Believing we are called into fellowship with God who seeks the flourishing of all, we aspire to strengthen our school communities with wisdom, knowledge and understanding. Through partnerships firmly rooted in Christian hope and in the love of God, we empower all in our Church school family to love one another with humility, justice and kindness.

The Diocesan Strategy is underpinned by the Diocesan Vision for Education. The Diocesan Strategy is a key vehicle to enable the LDBE to form an educational landscape where everyone is able to flourish. It supports the LDBE to strengthen school communities with wisdom, knowledge and understanding. Through strong partnerships with MATs, which are rooted in Christian hope and in the love of God, the LDBE will empower all to love one another with humility, justice and kindness.



Section 5 - Our Hope for a Flourishing Schools System: Deeply Christian, Serving the Common Good



In July 2023, the Church of England Education Office launched a new publication called 'Our Hope for a Flourishing System: Deeply Christian, Serving the Common Good'. This guidance reaffirms its Vision for Education published in 2016 and is aligned to the Lincoln Diocesan Vision for Education.

The concentric circles opposite shows that our schools' system should choose to place children at the heart of all decision-making and resourcing. As we move outwards the model shows that flourishing adults in flourishing schools are crucial to this instinctive prioritisation of young people. In this model, we recognise the crucial role that flourishing school trusts have to play in the system going forward.

The diocese recognises that school trusts can only flourish in strong strategic partnerships with flourishing dioceses, such as the Diocese of Lincoln which is committed to placing education at the heart of their wider diocesan vision.



Sections 6 to 8 – Working Relationships with the DfE, LA and other dioceses

Section 6 – Working with the Regional Directors (RDs) and the LDBE

The LDBE values its close working relationship with the Department for Education.

The Memorandum of Understanding (MOU) agreed by the National Society and the Secretary of State for Education sets out the national expectations for the DBE and DfE's relationship with regards to the academy agenda.

The primary expectation is that RDs will consult with the Diocesan Strategy as the main point of reference to understand the local relationship and expectations for engagement with church schools.

This section includes bespoke information to facilitate the working relationship between the LDBE and RDs office.

1. DfE Regions

The Diocese of Lincoln falls into two DfE regions:

Lincolnshire is in the East Midlands region.

North and North East Lincolnshire is in the Yorkshire and Humber Region.

It is important that both DfE regions have a consistent and shared understanding of the Diocesan Strategy.

2. Points of Contact

The lead officer for the LDBE Diocesan Strategy is Paul Thompson, Diocesan Director of Education
paul.thompson@lincoln.anglican.org

The Chair of the Diocesan Board of Education and the LDBE MAT Scrutiny Panel is the Archdeacon of Boston, The Venerable Dr Justine Allain-Chapman

The DfE Regional Directors for the Diocese of Lincoln are:

Carol Gray RG.EM@education.gov.uk

Alison Wilson RG.YH@education.gov.uk

3. Interactions

The LDBE and RDs office frequently interact with each other to discuss pertinent issues relating to this Diocesan Strategy. It is important that both parties share substantive messages relevant to this Diocesan Strategy in a timely manner.

The communication is usually between the RDs' team leaders and the Diocesan Director of Education. The contact is mostly through virtual meetings, emails and phone calls.

It is expected that the DfE and LDBE will have agreed the agenda items in advance of the meetings whether they are virtual or face-to-face.

The agenda items typically include:

- Updates to the Diocesan Strategy
- DfE updates to the Academisation Policy / Processes
- Church MAT key updates including data
- Schools eligible for DfE intervention
- Schools eligible for DfE School Improvement Offer
- Church Schools applying for LDBE consent to join a MAT.

Once a term, it is expected that there is a face to face meeting with each of the three Local Authorities and DfE representatives to discuss the schools in scope of DfE intervention. The agenda for these meetings is agreed between the three organisations and circulated at least one week in advance of the meeting.

Section 7 – Working with the Local Authorities

There are three Local Authorities (LAs) in the Diocese of Lincoln. The relationships with all three LAs is considered to be positive and constructive.

The LDBE is a key partner on LA strategic boards including:

- Lincolnshire Education Group (LEG)
- North Lincolnshire Education Standards Board
- Scrutiny Panels for Children and Young People in all three LAs.

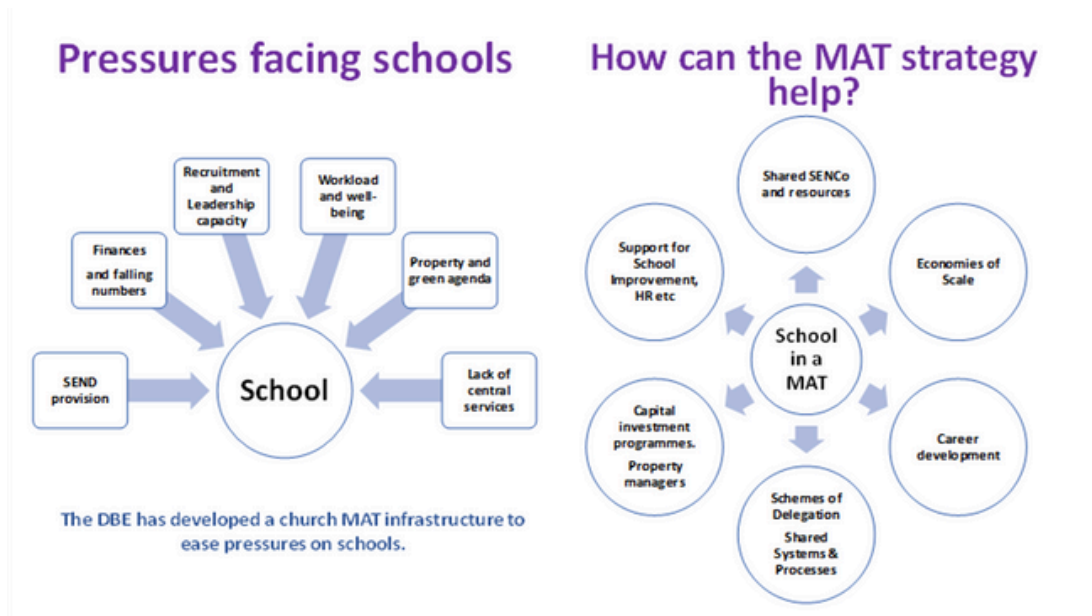
LDBE officers support LA strategy meetings for schools causing concern. The LDBE and LAs work collaboratively to support and challenge school leaders and governors of LA maintained schools. If the LA schools are in scope of DfE intervention, the LA and diocese will discuss possible solutions in accordance to the Diocesan Strategy.

The Diocesan Director of Education shares key developments and updates regarding the Diocesan Strategy with LA senior officers on a termly basis. The LDBE will seek key updates about the LA landscape such as fluctuations in pupil numbers, housing developments, changes in education provision etc, as the Diocesan Strategy aims to be responsive to local need.

The Diocesan Strategy is not a strategy to force or direct LA schools to join a church MAT. However, acknowledging the range of challenges schools are facing, such as recruitment and retention of staff, falling pupil numbers and reduced budgets, workload and well-being it is the LDBE's desire and preference for all its church schools, including good and outstanding schools to join a Diocesan approved church MAT. A schools within a MAT will gain greater capacity to ease pressures which impact on the quality of education.

When the DBE has concerns about the governing boards capacity to address multiple and significant issues impacting on the quality of church school education the DBE will formally invite the school to join a church MAT in the Diocese of Lincoln.

The diagram on the next page illustrates the pressures facing schools and how the MAT strategy can help.



It is important that Governing Boards of LA maintained church schools monitor education and financial projections, stay abreast of local, diocesan and national developments and make well informed decisions about joining a MAT.

If the LDBE receives an application for consent from a LA maintained church school to join a MAT, the LDBE will seek the agreement of the Governing Board to share this information with the LA.

The LDBE requires the LA to undertake the statutory transfer of school sites before providing consent to convert a church school into an academy.

Section 8 - Cross diocesan working opportunities

The LDBE values its relationships with other dioceses. The LDBE team engages in a range of cross-diocesan working groups. For example:

- The DDE Midlands regional network
- School Conditions and Allocations Funding with the Diocese of Sheffield
- RE Networks with neighbouring dioceses
- Diocesan Governance Group for dioceses

In 2021, the LDBE also enabled two diocesan schools to enter the Diocese of Southwell and Nottingham MAT. This was at a time when there was not a 'majority' church MAT to support two federated academies (one secondary and one primary) in Special Measures. As an exceptional circumstance the LDBE gave consent to this arrangement.

Through this Diocesan Strategy, the LDBE expects that all church schools in the diocese will enter into a majority church MAT approved and located within the diocese. The effectiveness of this strategy is calculated upon the number of schools, the number of pupils and the contextual information regarding the education landscape in the diocese of Lincoln. Enabling other church MATs that sit outside of the Diocesan Strategy to support Lincoln diocesan schools will compromise the Strategy.

Sections 9 to 15 - The Current MAT Landscape in the Diocese of Lincoln

Section 9 - Number of Schools and Academies





As of September 2024 there are 142 church schools in the Diocese of Lincoln.

- In Lincolnshire, there are 117 church schools.
- In North Lincolnshire, there are 19 church schools.
- In North East Lincolnshire, there are 6 church schools.
- There are 10 church academies in Single Academy Trusts. (7%)
- There are 37 church academies in 'majority' church MATs. (26%)
- There are 95 LA maintained church schools in the diocese. (67%)

Section 10 - Number of Majority Church Multi-Academy Trusts approved by LDBE

As from September 2024, there are four majority church MATs in the diocese. They are:

- The Lincoln Anglican Academy Trust www.thelaat.co.uk
- The Infinity Academies Trust www.infinityacademies.co.uk
- The St Lawrence Academies Trust www.slatrust.co.uk
- The Abbey Academies Trust www.abbeyacademies.co.uk

<u>Lincoln Anglican Academy Trust</u>	<u>Abbey Academies Trust</u>	<u>Infinity Academies Trust</u>	<u>The St Lawrence Academies Trust</u>
21 church schools across the geographic region of the Diocese of Lincoln	3 primary church schools	13 schools currently based around the Boston and Grantham regions	2 church schools and 1 community school
Primary and secondary	Based in south Lincolnshire	Church and community primaries	Based in North Lincolnshire
4175 pupils	1024 pupils	2527	1252 pupils
 LINCOLN ANGLICAN ACADEMY TRUST DIOCESE OF LINCOLN	 ABBEY ACADEMIES TRUST	 Infinity Academies Trust	 St Lawrence Academies Trust Stronger Together

Section 11 – The Strategic Map of the Diocese of Lincoln

The LDBE does not consider there to be any fixed or hard internal borders within the diocese. While the LDBE does encourage schools to retain local collaborative partnerships, schools may decide to join a church MAT which is not based in their local area. The church MATs are able to establish hubs in different areas of the diocese if that supports schools and the growth and development of their Trust.

A possible future church MAT landscape in the diocese of Lincoln (Updated 1 September 2024) Distribution of 142 schools – of which 37 (26%) are in a MAT and 27,569 pupils – of whom 8264 (29.98%) are in a MAT

<p>AREA 1 – The North</p> <p>St Lawrence Academies Trust, Lincoln Anglican Academies Trust and the Infinity Academies Trust are operating here.</p> <p>Both MATs have capacity and desire to grow in this area.</p> <p>4900 pupils - of whom 2128(43.4%) in a MAT 25 schools/academies – of which 10 are in a MAT</p> <p>NO NEW MATS NEEDED IN THIS AREA</p>	
<p>AREA 2 – Lincoln area</p> <p>Only LAAT operating in this area. LAAT has capacity and desire to grow in this area</p> <p>Other existing church MATS and the potential new church MAT, Keystone have capacity and desire to support in this area as well.</p> <p>6930 pupils – of whom 434 (6.26%) are in a MAT 30 schools/academies – of which 2 is in a MAT</p>	<p>AREA 3 – Louth/Alford area</p> <p>No church schools are in a church MAT in this area.</p> <p>Some capacity for existing MATs to grow in this area.</p> <p>PRIORITY AREA for a new MAT</p> <p>2761 pupils 20 schools/academies</p>
<p>AREA 4 – Grantham area</p> <p>Infinity Trust + LAAT operate here and have capacity and desire to grow in this area.</p> <p>Additional capacity is also possible from approved church MATs</p> <p>5260 pupils – of whom 1579 (30%) are in a MAT 30 schools / academies – of which 9 are in a MAT</p> <p>NO NEW MATS NEEDED IN THIS AREA</p>	<p>AREA 5 – Boston area</p> <p>The Infinity Academies Trust and LAAT operate here and have capacity and desire to grow in this area.</p> <p>Additional capacity is also possible from approved church MATs</p> <p>2834 pupils – of whom 1547 (54.58%) are in a MAT 15 schools/academies – of which 7 are in a MAT</p> <p>NO NEW MATS NEEDED IN THIS AREA</p>
<p>Area 6 – the South</p> <p>Abbey Academies Trust, LAAT and Infinity Academies Trust operate in this area and have capacity and a desire to grow in this area.</p> <p>4884 pupils – of whom 2576(52.7%) are in a MAT 22 schools /academies – of which 9 are in a MAT</p> <p>NO NEW MATS NEEDED IN THIS AREA</p>	

Section 12 - Federations

There are 34 LA maintained church schools in hard federations in the diocese. They share leadership and governance arrangements with other schools, some being community schools.

The federation arrangements have enabled schools, mainly small schools to benefit from sharing resources, shared staff, shared CPD etc.

The DfE has stated they appreciate federation arrangements and would not wish to 'destabilise' a federation if at all possible.

If a church school in a federation receives an academy order and requires sponsorship the LDBE expects that the DfE, in consultation with the LDBE, will find an appropriate church MAT in the diocese of Lincoln to sponsor the school causing concern and accept the federated partner school. The RDs Advisory Board will make its recommendation to the RD and a decision regarding the MAT sponsor will be made. The Governing Board will consult with key stakeholders in relation to the federated school joining the same MAT as the school causing concern. To keep the federation intact, this is the only option the Governing Board has. The LDBE and then the RDs office will make the provisions for consent if this is deemed appropriate. The schools will then join the MAT together to avoid any complications regarding the leadership and federation arrangements.

Section 13 - Joint Church Schools - CE / Methodist Schools

There are five schools in the diocese of Lincoln which has an Anglican and Methodist foundation. One of these schools joined the LAAT in 2014. At that time, the Articles of Association for LAAT enabled a Methodist representative to become a Trust Director.

For joint church schools to join one of the diocesan MATs, the LDBE, the Methodist Church and the MAT would need to negotiate a variation to the Articles of Association to ensure the Methodist Church foundation was adequately protected.

For a joint church school to join a Methodist MAT, the LDBE, the Methodist Church and the MAT would also need to negotiate a variation to the Articles of Association to ensure the Anglican Church foundation was adequately protected.

In both situations, the MAT would need to cover the legal costs associated with amending the articles. It is not expected that an Anglican only school will join the Methodist Church MAT. In the exceptional circumstance, where an Anglican school is federated with a joint Church School, then the LDBE will consider the possibility of giving consent for both schools join the Methodist MAT as a federation; subject to there being adequate protection in the Articles and that both schools continue to fully engage with the LDBE which includes the schools procuring the services and support of the LDBE.

Section 14 - Small Schools

There are 50 schools with less than 110 pupils in the diocese of Lincoln. Many are housed in beautiful Victorian buildings and are the hub of the village. Many adults and pupils flourish within these settings. However, the financial sustainability is often a driver for Governing Boards exploring MAT options.

Church MATs welcome schools of all sizes. For example, the Lincoln Anglican Academy Trust and Infinity Academies Trust both have schools with less than 50 pupils. However, church MATs have to be careful in their financial management and it is not possible to take in lots of small schools unless there are larger schools in the MAT as well.

If a small school has an academy order, the LDBE, DfE and church MATs will negotiate which MAT is best placed at the time to support the small school. It is expected that together we will find a solution within the diocese to accommodate a small school requiring sponsorship.

If a small school wishes to join a church MAT, the school will be encouraged to explore church MATs as part of a collaborative group of schools. A group of small schools within a geographical area provides an opportunity for a church MAT to establish a hub and support multiple small schools. It is possible that a church MAT may have to respond with 'not yet' if due diligence information indicates that the MAT is not able to support a small school at the time. The LDBE will support small schools to become as attractive as possible to church MATs, e.g. developing leadership models, collaborative partnerships etc.

From September 2024, in order for schools to receive the conversion grant of £25k from the DfE, schools must apply as a group of 3. The LDBE and MAT will help schools formulate their group of three during the application process.

Section 15 - New schools

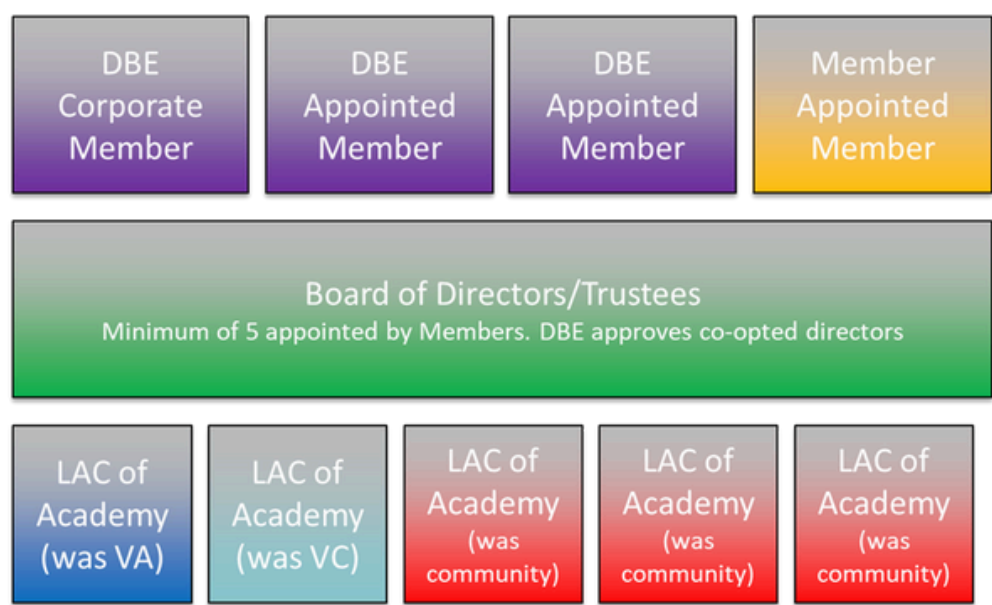
Where there is a need for a new Church of England Academy, it is expected that the RD will work with the DBE to establish it, in accordance with the diocesan strategy. It is expected that one or more church MATs in the diocese of Lincoln will be keen to submit an application for a new Free School should the opportunity arise.



Section 16 to 19 – Governance in Lincoln Diocesan Church MATs.

Section 16 - ‘Majority’ Church MATs

Church of England schools and academies in the diocese of Lincoln may only join one of the ‘majority’ church MATs listed in section 10. The term ‘majority’ means that most of the Members of the Trust are appointed by the diocese and the Members appoint/approve the majority of the Directors/Trustees. (See diagram below). The ‘majority’ governance model as set out in the Articles of Association legally requires Members and Directors to preserve and develop the Christian distinctiveness of the MAT and the church schools within the MAT.



Section 17 - Local Governance/Local Academy Committees

At local governance level, (the bottom tier of governance in the model diagram above), LDBE expects that the proportion of local governors to represent the Christian foundation will be the same as it was in its former status. For example, former voluntary aided (VA) church schools will have a majority of ‘foundation’ governors on the Local Committee. Former voluntary controlled (VC) church schools will have a minority of ‘foundation’ governors on the Local Committee. Former community schools will not have any ‘foundation’ governors.

The MAT will develop its own Schemes of Delegation and Terms of Reference for any committees that are formed. The MAT will seek LDBE written consent for the Scheme of Delegation and Terms of Reference that are developed with regards to the strategy before it is published on its website.

Section 18 - Appointing to the majority governance model.

- **Members:** The LDBE will appoint the majority of Members to the MAT.
- **Directors/Trustees:** The Members will appoint/approve Directors to the Trust Board.
- **Local governors:** The Directors appoint the local governors. The Directors must consult with the LDBE before any 'foundation' governors are appointed. The LDBE consult with the PCC as well.

There is a formal process for appointing at each level of governance in the accompanying toolkit. The LDBE requires application forms, reference forms and ethos undertaking forms to be completed for Members, Directors and Local Governors.

Section 19 - LDBE reporting requirements for MAT governance

In accordance with the DBE Measure 2021, the LDBE has a statutory responsibility to ensure that the Christian character of church schools is preserved and developed. It is therefore essential that the LDBE receives information from the MAT about the measures in place to secure the Christian foundation.

At Member level, the Members will be entitled to attend Trust Board meetings and receive the papers and minutes from the meetings. The Articles of Association stipulate when consent is required from the Members. The LDBE expects there will be at least two Members meetings during the academic year (including the formal AGM) when Members will receive reports relating to the five pillars of the DfE Trust Quality Descriptors. The Diocesan Corporate Member (DCM) representative will be expected to share key MAT reports / updates with the Diocesan Director of Education (If the DCM representative is not the DDE).

In the toolkit, there are example reporting templates for the Trust Board to submit to the Members. There is a template to provide the Members with an annual oversight of the MAT. This should be attached to the risk form for Church Schools. The Members should also receive an annual overview of each Church School in the MAT.

The LDBE requires that the scheme of delegation clearly identifies where responsibility lies for monitoring and support of the Christian character of each church school. In the Toolkit, there is a template for the designated authority to complete with the headteacher; this should be submitted to the Trust Board on an annual basis. There is a primary and a secondary version of this template.

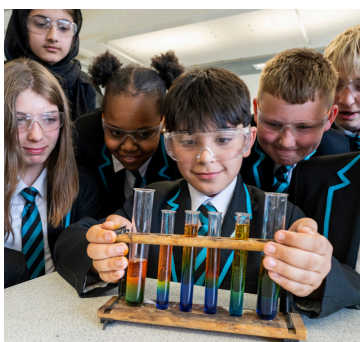
The LDBE requires the CEO of the MAT to complete an annual summative report of the Trust's performance, key developments and areas for improvement. This report is to be returned in the Autumn term for consideration at the DBE's Learning and Development Committee.

The CEO of each church MAT will also be required to engage in termly CEO network meetings with the Diocesan Director of Education. At these meetings, the CEO will be requested to share non-commercially sensitive information about their MATs in order to advance the Diocesan Strategy.

The LDBE requires each MAT to present key developments and growth plans at a full DBE meeting or Learning and Development Committee meeting once a year. This provides an opportunity for LDBE directors to ask questions about the MAT and how it is supporting church schools. The requirement for MATS to share information and key developments is in accordance to the DBE Measure 2021 section 12.

The Diocesan Director of Education and the Chair of the DBE will undertake an annual visit to the MATs central offices or schools within the Trust to glean first hand information from key stakeholders (e.g. central team, school staff, pupils).

Through the MAT Partnership Agreement, all the church academies within the MAT will facilitate a diocesan officer to undertake an annual diocesan visit and provide information needed for the LDBE to monitor, support and develop Christian distinctiveness in each academy. The MAT will receive a report for each academy as well as a report which collates key findings from the annual series of diocesan visits. It is expected that the MAT directors respond to these reports accordingly and share the summative report with Members.



Section 20 – Articles of Association

Over the past decade, the model Articles of Association have been revised to strengthen the protection of church schools and to support the effective governance of MATs. The current church MATs adopted the model version of the Articles at the time they were formed and therefore the four MATs use different versions of the Articles.

In July 2022, the LDBE agreed that:

All majority church MATs in the diocese should adopt the latest version of the majority articles without variation when the next school applies for consent to enter their Trust.

This will bring standardisation across all MATs and support the LDBE's ability to monitor, support and challenge church school distinctiveness. There will be a cost to the MATs to change their articles and that is why it is suggested the articles are changed when they get funding to accept their next academy.

To date, no church MAT has moved to the latest version of the model articles because it was subsequently announced that the Church of England Education Office and the DfE were producing new Articles to be published in September 2023. The MATs are therefore required to adopt this new version of the Articles when the next school applies to enter their Trust.

Section 21 - Appointment of the MAT CEO and Principals of academies in the MAT.

In the earlier versions of the Articles of Associations, it stated that the MAT had to consult the LDBE with regards to the appointment of the CEO and Principals/Headteachers of church academies in a MAT.

In the latest version of the Articles (Article 107), it states that the MAT must get the consent of the LDBE for the appointments of the CEO and headteachers. The LDBE has informed the church MATs that it expects the Trust Board to fully involve the Diocesan Director of Education in the recruitment process of the CEO and headteachers of church schools. They are not expected to make appointments against the advice of the DDE.

As soon as a resignation is tendered for the CEO or headteacher post of church schools, the MAT is to inform the DDE as soon as possible. The MAT is to involve the DDE at every stage of the recruitment process including the development of the recruitment pack and advert, the shortlisting, the design of the interview days and the selection days. The DDE is to be involved in the deliberations and the MAT is to have due regard for the DDE's advice. In the unlikely event that the DDE is not in agreement with the rest of the selection panel, the Trust Board is not expected to make an appointment.

Section 22 - A community school wishing to join a church MAT.

Church schools value collaborative partnerships with community schools. The LDBE has approved a number of hard federations between church schools and community schools. The Articles of Association enable community schools to join 'majority' church MATs and retain their individual ethos and identity.

The Infinity Academies Trust has a good mix of church and community schools. The LDBE has produced [guidance for community schools](#) wishing to join a church MAT.

The LDBE is therefore supportive of community schools joining church MATs.

However, as is the case for any school wishing to join a church MAT, the LDBE needs to understand what impact a school joining a church MAT will have on the MAT and the other schools within the MAT.

A community school does not require LDBE consent to join a church MAT but the LDBE expects the MAT to consult the LDBE on any applications from a community school to join a church MAT. A copy of the consultation form for the MAT to complete can be found in the Toolkit.

In the earlier version of the Articles of Association (Article 5h), it states that only the Directors needed to approve new schools entering the Trust. In the later versions of the Articles, the Members are required to give consent as well. To be clear on consent for schools entering church MATs, the LDBE expects the following:

- Community Schools – Church MATs need Members and Directors consent and they need to consult the DBE and have due regard to LDBE advice (as per the DBE Measure 2021)
- Church Schools – Church MATs need Members, Directors and LDBE consent.

Section 23 - Schools causing concern and in scope of DfE intervention

It is expected that the DfE will communicate with the LDBE as soon as possible to discuss a school or academy causing concern and in scope of DfE intervention.

In the National MOU, Key Principle 5, it states that *‘DfE officials and academy representatives will not enter into detailed discussions with a Church School or about conversions, concerns over standards, movement into a MAT or movement from one MAT to another without there having been prior discussions with the DBE, referencing and engaging with the Diocesan Strategy and ensuring continuing diocesan engagement in any consequent process’.*

The DfE will formally invite the Governing Board, LA and the DBE to provide representations regarding the eligibility for intervention. In all cases, the LDBE will provide representations in writing taking into account the contextual information of the school and its capacity to improve in its current form (e.g. as a LA school or as an academy in its current church MAT).

When a school requires sponsorship the LDBE will identify with the DfE at least one church MAT in the diocese of Lincoln that has capacity to sponsor the school.

‘The availability of strong MATs is central to driving up performance in an academy trust led system. Every strong academy trust benefits from freedom to innovate and to find efficiencies across the group of academies they manage. They are expected in return to embrace their responsibility by supporting the implementation of the Diocesan Strategy and helping those underperforming academies that join their trusts to support their improvement’ (National MoU, 2 (a)).

If there is more than one church MAT in the diocese that could sponsor the school, the DfE will determine its preferred MAT on a case by case basis, using the High Quality Trust Framework and in consultation with the LDBE

This Diocesan Strategy intends to avoid a situation in which there are no church MATs able to sponsor a church school. Where the LDBE agrees that there is a highly exceptional circumstance in which there is no church MAT able to sponsor a church school in an acceptable timeframe, the LDBE will consider a 'majority' church MAT from a neighbouring diocese as a sponsor. This will only be the case if there is a clear MOU in place that the school continues to fully engage with the LDBE which includes procuring the services and support of the LDBE.

Inadequate church academy in a church MAT

If a church academy within a church MAT is causing concern, it is expected that the DfE will contact the DBE as soon as possible and prior to a Termination Warning Notice (TWN) being issued.

When a TWN is issued, the LDBE will make representations to the DfE taking into account the contextual information and the MAT's capacity to improve the academy.

If it is the DfE's decision to move the academy out of the Trust, the LDBE expects that the academy will move into a different church MAT within the diocese. The process for finding a new church MAT sponsor will be the same as described above.

In the highly exceptional circumstance when the DBE considers that the church MATs lack sufficient capacity to sponsor a particular school within an agreed timescale, then the LDBE will consider a 'majority' church MAT from another diocese with the same stipulations listed above.

In the National MOU, it states that, *'The Secretary of State and the National Society both expect adherence to the Diocesan Strategy. The RD will consider the Diocesan Strategy to identify opportunities, ensuring that, in all circumstances, the potential solution best safeguards the religious character of the church school. This may include, for example, (i) a Church MAT that is not geographically local to the church school (which may include establishing a Hub model), (ii) an existing MAT which may require cross diocesan support.'* (National MoU 3 (b) (a)).



Sections 24 to 29 – The future MAT landscape for the Diocese of Lincoln

Section 24 - The aim of six MATS

The White Paper (March 2023) stated that strong MATs will grow to at least 7,500 pupils. *'We expect that most trusts will be on a trajectory to either serve a minimum of 7,500 pupils or run at least 10 schools.'* (Section 130, 'Opportunities for all – strong schools with great teachers for your child' March 2022)

In the diocese, there are approximately 29,000 pupils in church schools. That suggests 4 church MATs are enough.

The Church of England Education Office estimates there will be a total of 150 church MATs across the country. This equates to approximately an average of 4 MATs per diocese.

The LDBE's aim however is to create a total of six 'majority' church MATs in the diocese of Lincoln.

A total of six church MAT in the diocese is considered to be the optimum number of MATs required to ensure there is sufficient capacity, choice, coherence and sustainability for high quality church school education.

Why 6 MATs?

In this diocese, there are church schools in federations or collaborative partnerships with community schools. It is expected that school leaders will want to maintain these partnerships and so it is possible that community schools will want to enter church MATs as well. The additional number of community schools is uncertain at this stage, but it is expected that there will be sufficient demand to warrant six church MATs.

Some school leaders exploring MATs have reported they would like a greater choice of church MATs. Not all four MATs currently stretch across the diocese and so leaders feel the choice in geographical terms is limited. (See the map in Section 11).

Lincolnshire is an Education Investment Area as the LA school performance is below the national average. In 2023, five church schools were issued with Academy Orders. The DfE is keen to see the current capacity of church MATs increase to support the underperforming schools in the County. DfE Trust Development Statements have been developed in conjunction with the LDBE to identify where additional church MAT capacity is needed.

If the LDBE approves more than six church MATs then the growth and viability of the MATs may be undermined. It will also be more difficult for the DBE to keep a good oversight of the Christian distinctiveness and effectiveness if there are too many MATs.

In the National MOU, the *'Secretary of State recognises the need for DBEs to sustain the diocesan family of schools through the outworking of the Diocesan Strategy. This includes maintaining proper oversight of the diocesan family of schools and ensuring capacity within the academy trust regarding any further underperforming schools (either religious or non-religious) that are taken on by their MATs' (National MoU 2(b)).*

It is the LDBE's expectation that the six church MATs will serve schools from different contexts. It is important that there is a rich mix of schools in the six Trusts. Each Trust will be required to support schools of varying sizes with different inspection outcomes in a range of localities. An imbalance of schools may lead to a Trust failing to support all its schools successfully.

Section 25 - New Church MATs

In December 2022, the LDBE gave consent to the Keystone Academy Trust to become a church MAT. It will be able to serve church and non-church schools, primarily in the Lincoln/North Kesteven area of the diocese. From September 2023, the LDBE team has supported the Trust Board to appoint a new CEO and to ensure that all the legalities are in place and meet with DfE approval. More details about the Trust can be found on their website <https://www.keystoneacademytrust.org.uk/>. It is anticipated Keystone Academy Trust will be operating as a church trust in 2024/2025

Section 26 - LDBE's criteria and process for consenting to the next new church MAT for the diocese.

In June 2023, the LDBE re-evaluated the church MAT capacity across the diocese and confirmed that a new church MAT was required to primarily serve the area east of Lincoln (see Area 3 on the map in Section 11).

Stage 1 – Expressions of Interest

In the summer term 2023, LDBE invited schools to express an interest if they wanted to form a new MAT. They were invited to provide an outline of how their new MAT would meet the five key criteria below:

1. The MAT serves areas of the diocese where there are still a significant number of church schools needing to academise and there is not an obvious choice of at least two church MATs with capacity to serve schools in that area (e.g. Area 3 on the diagram in Section 11)
2. The MAT to have demonstrable ability to preserve and develop the Christian character of church schools with different contextual characteristics especially small rural schools and schools with vulnerabilities.
3. The MAT to have demonstrable ability to achieve good outcomes for SEND and disadvantaged pupils.
4. MAT leaders have shown they are able to maintain and develop strong and positive relationships with the LDBE.
5. The MAT originates from within the diocese of Lincoln and originates from a group of diocesan schools who have a commitment and capacity to support each other within a church MAT family. (This supports the DBE's responsibility to provide robust church school oversight).



Stage 2 – Application for LDBE consent

Groups of schools that are able to show some evidence that they meet the five criteria above were requested to submit a detailed application form to determine that:

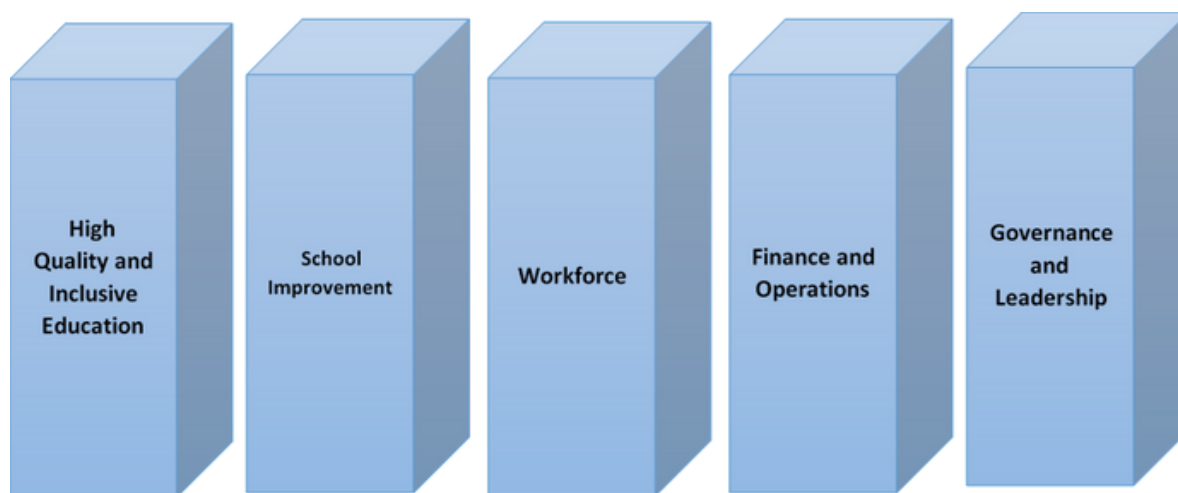
1. Applicants understand what it means to be an inclusive local school with a distinctively Christian ethos.
2. The new MAT will ensure that church schools will continue to develop as Church of England schools in accordance with the school's original Trust deed. They are committed to the Church of England's and Diocesan Vision for Education and will proactively engage in the SIAMS inspection process across the MAT. Applicants are required to address the following areas: governance, leadership, parish partnerships, worship and spiritual development, Diocesan partnerships, church school family including small and rural schools.
3. The new MAT will have a robust business model and be able to provide realistic information about how central services will be run, how economies will be provided across the trust, who the CEO/Accounting Officer is, how central services will be funded.
4. School improvement will provide both challenge and support for schools and secure good outcomes for all pupils.
5. Governance structures at each level of the trust are in line with the 'majority' church model and there are clear lines of accountability.
6. There is a secure track record and projections for good school performance and financial management within the group of schools. Applicants are required to provide the following information for each school wanting to form the MAT: 3-year budget forecasts; numbers on roll and 3-year predictions, Standards – including Ofsted, SIAMS, end of KS data; pupil outcomes for SEND and disadvantaged pupils.
7. Key stakeholders are supportive of the proposal to form a MAT as evidenced by consultation exercises.
8. The application supports the LDBE to achieve its MAT strategy – 'for there to be 6 strong and successful church MATs in the diocese that enables all church schools to flourish' (The LDBE will consider how the formation of a new church MAT will impact on the growth and development of existing church MATs).
9. There is a clear rationale to form a new MAT rather than join or merge with an existing church MAT.
10. There is a firm commitment from other church schools to join the Trust should it be approved. ('No obligation' supporting statements from church schools can be included with this application).
11. Governing Boards show that the decision to submit this application for DBE consent to form the trust has been ratified.
12. Applicants accept that if consent is given then full costs (legal and otherwise) including diocesan costs will be borne by the school/Trust. The cost is £2,500, as stated in the letter dated September 2022, additional costs may occur if there are complexities with conversion.

As of September 2024 LDBE has not give consent for the establishment of a sixth MAT. The LDBE continues to pursue this aim.



Section 27 - The five pillars of quality multi-academy Trusts

The LDBE will also take into account the DfE guidance, '[Commissioning High Quality Trusts](#)' (July 2023) and the five pillars of quality for multi-academy trusts:



The [Trust Quality Descriptors](#) associated to the five pillars will be used to support the development and growth of church MATs in the diocese.

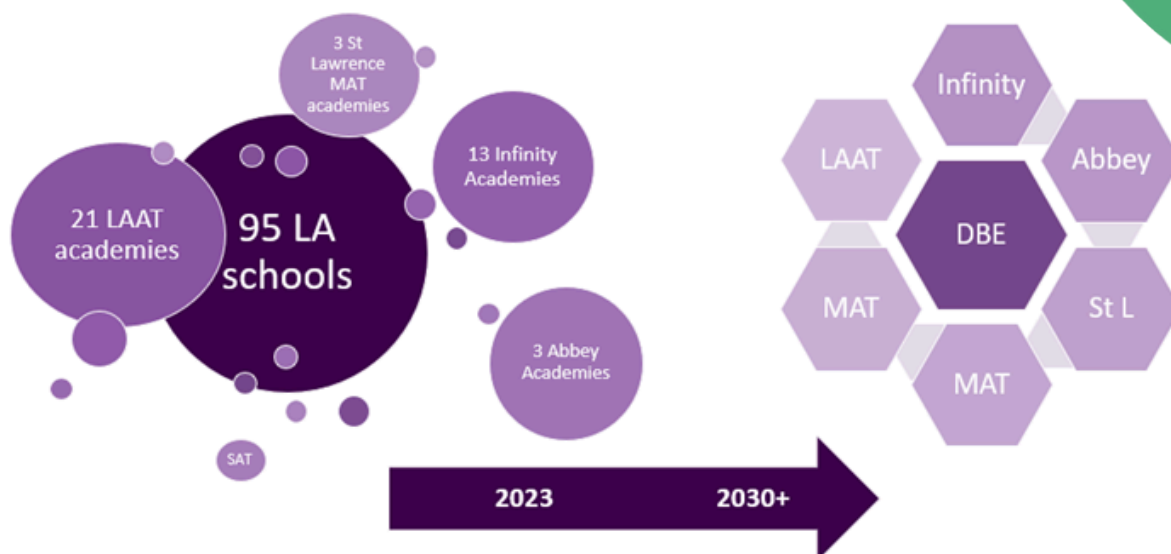
Section 28 - Church MATs from other dioceses

It is the LDBE's policy that all Church of England Schools may only enter one of the approved diocesan MATs listed in Section 10, unless there are highly exceptional circumstances. The contextual information of exceptional circumstances will be considered by the LDBE on a case-by case basis.

In January 2021, an exceptional case was made where a secondary academy required an academy sponsor due to being placed in an OfSTED category. At that time, it was agreed that the church MATs in the diocese did not have the capacity to sponsor the academy. The LDBE gave consent for the academy and its federated primary school (also in an OfSTED category) to enter the Southwell and Nottingham diocesan 'majority' church MAT. These two academies remain as Lincoln diocesan schools within the DSNMAT and continue to relate to the LDBE.

The LDBE does not plan to give consent to any other schools to join a church MAT that is not located in the diocese of Lincoln, other than in circumstances identified by the LDBE as exceptional, this will be addressed on a case by case basis. The Diocesan Strategy is based upon the LDBE monitoring, supporting and challenging six strong and sustainable MATs within the diocese. The diagram below shows how the Diocesan Strategy will progress from the current education landscape with its mix of LA maintained schools, single academy trusts and MATs to a future landscape where the LDBE is at the centre with clear oversight of the church MATs and academies within the diocese.

Section 29 – A pictorial representation of the Changing MAT Landscape in the Diocese.



Section 30 to 31 - LDBE Processes for Academisation

Section 30 - The LDBE MAT Scrutiny Panel for academy applications

To be able to manage the anticipated increase in applications to form or join a Multi-Academy Trust in a timely and efficient manner, the LDBE has established a LDBE MAT Scrutiny Panel. This committee convenes as soon as practically possible (within 6 weeks of receiving an application) to evaluate the applications in detail and makes a recommendation to the full Board. If there are no contentious issues, the DBE has agreed to provide ratification by e-mail.

The Chair of the LDBE MAT Scrutiny Panel is the Chair of the Board of Education, Archdeacon of Boston, the Venerable Dr Justine Allain-Chapman.

There are five members on the LDBE MAT panel in total. For more information about the members of the LDBE MAT panel, please contact the DBE administrator ellen.cross@lincoln.anglican.org

Section 31 - DBE guidance for church schools exploring MATs

The Memorandum of Understanding between the National Society and the Secretary for State of Education recognises that consent is required from the Diocesan Board of Education for a church school to convert to an academy. The LDBE has produced a [Guidance document](#) for schools considering the possibility of joining or forming a church MAT. The LDBE team is also available to present impartial guidance at a Governing Board meeting.

In essence the LDBE guidance advises that the Governing Board sets up a working party to do thorough research on the church MATs available to them. The school needs to be confident that the MATs vision and values align to their vision for education; they need to be confident that the MAT has the capacity to meet the school's needs; and they need to see if the school has the opportunity to contribute to the MATs growth and development.

When the Governing Board's working party has done its research, it needs to present the options and make a recommendation to the Governing Board. The Governing Board will need to make a resolution to either stay as they are or to apply to join a church MAT.

If it is the Governing Board's decision to join a church MAT, the Governing Board will need to invite their preferred MAT to undertake initial due diligence of the school. If the MAT is happy to proceed with the prospect of the school joining the MAT, then the school and MAT will need to submit a joint application for LDBE consent. The application form is available from the LDBE administrator at ellen.cross@lincoln.anglican.org. A copy of the application form can be found in the Toolkit.

The timescale for obtaining DBE consent may vary according to the scheduling of LDBE meetings, but it is expected that the DBE process will take no more than 6 weeks. This allows time for the LDBE to seek further clarification and information to support the application.

Upon receipt of the application, the LDBE team will evaluate the application and undertake due diligence activities related to the questions on the form. The LDBE MAT Scrutiny Panel will consider the evaluated evidence provided by the LDBE team and make a recommendation to the LDBE Board. The LDBE will be expected to give conditional consent unless there is good reason not to do so.

'subject to, (i) the satisfaction of any conditions that may be required by the DBE in the letter of conditional consent, including those relating to land and the completion of statutory transfers where required, and ensuring that the religious character and ethos of the school is maintained; and (ii) consistency with the Diocesan Strategy, we expect the DBE's final consent to be prompt.' (National MoU 1 (e))

An example of the conditional consent letter is in the Toolkit. When additional consent is required from Site Trustees, this will be made clear by the LDBE and the LDBE will assist in securing the consent required from Site Trustees.

When considering the consent for a church school joining a church MAT, the LDBE has agreed it will base its decision on three key factors:

1. The impact the school will have on the Trust.
2. The Trust's capacity to improve the quality of education in the school, whilst maintaining the capacity to support all the other schools in the Trust.
3. The impact upon the LDBE strategic aim to have 6 successful church MATs in the diocese, including the 'fair share' of schools.

The three factors do not explicitly mention the Trust's ability to preserve and develop the Christian character of the church school entering the MAT. This is a factor considered during the application stage but in the Guidance notes for schools considering joining a MAT, it is assumed that all 'majority' church trusts will be capable of doing this.

This assumption is risky unless there is ongoing monitoring, support and challenge in relation to church school distinctiveness, for all majority church MATs, from the LDBE team. As the MAT grows and the number of MATs increase to six, it essential for the LDBE church school oversight to be as effective and robust as possible.

Section 32-37 - LDBE services for MATS and Academies

Section 32 - Procuring the services of the LDBE team

The LDBE team needs to be funded to carry out the statutory functions as set out by the DBE Measure 2021 and provide the church school oversight required for MATs and academies. The LDBE does not receive any government funding to do this and relies on its own incomes streams to carry out this work.



A key funding stream for the LDBE is currently the Service Level Agreement (SLA) and the MAT Partnership Agreement (MPA). Schools not in a MAT are invited to join the SLA and about 90% of schools voluntarily subscribe to the SLA and receive a range of core services including an annual diocesan adviser visit and access to discounted training and events.

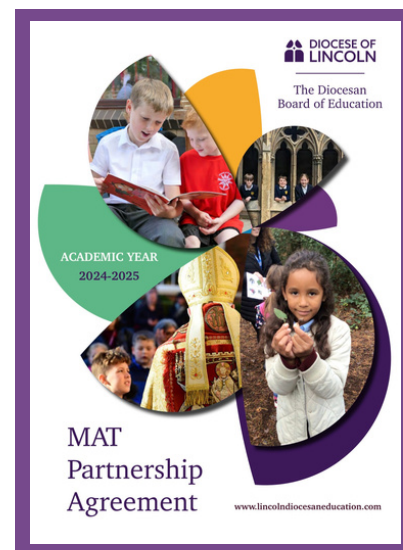
Section 33 - The MAT Partnership Agreement (MPA)

The traditional SLA for non-MAT schools has been retained but a new MAT Partnership Agreement (MPA) was introduced for MATs in September 2021. The MPA includes a range of services that are tailored for church MAT academies and the key focus of the MPA is to ensure the MATs and academies receive the statutory guidance, support and challenge to preserve and develop their Christian character. The MPA involves a named adviser to visit all academies within the MAT over the course of the year and to provide reports with recommendations for individual academies as well as MAT boards. The MPA will also provide access to discounted training specifically for church academies and MATs.

The MPA will not provide services or training that the MAT is able to provide itself or get from the Teaching School Hub.

The MPA is the vehicle for supporting academies to comply with the Articles of Association and the DBE Measure 2021. It will also secure the LDBE service offer in the future as more church schools join MATs.

In June 2022, the LDBE agreed to make it a condition of consent that all majority church MATs will procure the MPA each year for all church academies in the Trust.



Section 34 - Conflicts of Interest with the DBE

The Articles of Association (5s) enables the MAT Trust Board to enter into agreements that the diocese requires in order to support the church schools within the MAT. This is not regarded as a related part transaction as the LDBE is the appropriate religious authority. It is therefore permissible and necessary for the MATs to procure the MAT Partnership Agreement with the LDBE in order for the LDBE to carry out its statutory responsibility to monitor, protect and support the Christian character of every church academy within the MAT.

As noted above, the DBE does not enforce MATs to purchase LDBE training that it can obtain elsewhere either in-house or from a different provider.

Church MATs are not expected to deliver 'diocesan' training to schools outside of their MAT. This includes all training related to developing church school distinctiveness and effectiveness including SIAMS training. SIAMS inspectors who work for Church MATs are contractually restricted to providing training to church schools.

DBE staff who serve as MAT Members, Directors and Local Board Members are obliged to declare any pecuniary interests they may have.

Similarly, Church MAT staff who may serve on the LDBE are also obliged to declare pecuniary interests.

Section 35 - The LDBE Team

The key points of contact in relation to the Diocesan Strategy are:

Paul Thompson	Director of Education	paul.thompson@lincoln.anglican.org
Lynsey Norris	Assistant Director of Education	lynsey.norris@lincoln.anglican.org
Peter Tomlinson	Finance and Operations Manager	peter.tomlinson@lincoln.anglican.org
June Richardson	School Effectiveness Adviser	june.richardson@lincoln.anglican.org
Gillian Georgiou	RE and SIAMS adviser	gillian.georgiou@lincoln.anglican.org
Kim Dove	LDBE administrator	kim.dove@lincoln.anglican.org
Ellen Cross	LDBE administrator	ellen.cross@lincoln.anglican.org
Tracy Smith	LDBE administrator and Diary Manager for the DDE	tracy.smith@lincoln.anglican.org

The responsibilities for each LDBE team member can be found at www.lincolndiocesaneducation.com. Lots of information, guidance and resources relating to LDBE services and support can also be found on the diocesan website.

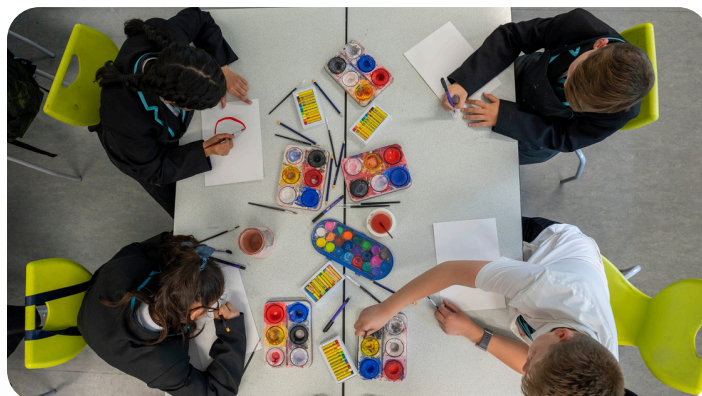
If you have any questions regarding the Diocesan Strategy, the main point of contact is Paul Thompson. Should you wish to make direct enquiries to the LDBE, you should contact the LDBE's administrator, Ellen Cross.

Section 36 - Review of the Diocesan Strategy

- This Diocesan Strategy document will be reviewed on an annual basis.
- This document was approved by the LDBE on 27th September 2023.
- Following LDBE approval the strategy documents were submitted to the Church of England Education Office, the DfE, the Local Authorities and the Church MAT CEOs for their response. It has also been forwarded to all church schools and academies in the Diocese and published on the LDBE website www.lincolndiocesaneducation.com/matstrategy.
- A copy of the Diocesan Strategy and Toolkit has been forwarded to the Church MATs.
- This document was reviewed in September 2024.
- The next review will be September 2025.

Section 37 - The Toolkit for MAT and school leaders.

To accompany this Diocesan Strategy, there is a toolkit containing supporting documents, templates and resources for church schools, academies and MATs.





"Educating for life in all it's fullness"

John 10:10

Lincoln Diocesan Board of Education
Edward King House
Minster Yard
Lincoln
LN2 1PU

01522 504010

www.lincolndiocesaneducation.com



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