

# Good Shepherd Catholic Trust

## Three Year Action Plan

### 2026-2029



### Vision

Our vision is the provision and development of a world class community of Catholic schools, providing the highest possible care, support opportunities and outcomes for every child. Pupils are cherished for who they are, as much as for what they achieve and all achievements are celebrated.

The Trustees will work closely with schools, their governors, staff, parents and the local community to develop together the successful citizens of our future.

### Values

***‘I will give you shepherds after my own heart, who will feed you on knowledge and understanding.’  
(Jer. 3:15)***

The distinctive ethos of our Catholic MAT is founded on the Gospel values of faithfulness, humility, truth, forgiveness, tolerance, dignity, service and respect. They are at the heart of all we teach our young people as part of an inclusive and diverse curriculum and inform our five core principles:

1. **Lead by example:** respect others as you would wish them to respect you
2. **Strive for excellence:** be the best you can be in all you do
3. **Education for all:** with a particular duty of care for the poor and disadvantaged
4. **Common Good:** working in partnership towards environmental sustainability and providing mutual support to benefit all
5. **Service and Inclusiveness:** reaching out to other schools requiring support

# Executive Summary 2026-2027

The Good Shepherd Catholic Trust currently consists of one secondary school and seven primary schools.

Over the 2025-26 academic year, the Headteachers of the trust schools had 4 planned, formal meetings throughout the year as the 'Leadership Group', which acts as an advisory board to the trustees. The Chair of Governors join these Leadership Group meetings three times a year. The meetings focus on improving the Good Shepherd Trust and strengthening provision for the pupils in each of our schools, now that a stable and strong central set of services and trust structure has been established.

The Good Shepherd Catholic Trust is founded on the principle of the **common good** and **subsidiarity** (see notes below on this). We try and ensure that our trust's central authority only has a subsidiary function, performing only those tasks which cannot be performed more effectively and economically at a local level, by the schools and LGCs. Over time, we may find that, with the support of the Leadership Group and Trustees, some further centralisation of specific services and functions takes place if schools and Trustees feel that would be beneficial, but this is likely to be a gradual and organic process which is guided by the school leaders and approved by the Trustees.

## ***Subsidiarity and Solidarity***

***Subsidiarity:*** *The principle of subsidiarity governs the way the Trust and the schools work together and underpins policies and procedures adopted by the Trust. By subsidiarity, we show the value we place upon the distinct identity of each school within the Trust.*

***Solidarity:*** *Within the Trust we recognise that each person is connected and dependent on every other person. Each school within the Trust is called upon to work in solidarity, with a determination to commit to the common good; that is the good of all and of each individual because we are all responsible for all'. (Sollicitudo Rei Socialis, 38).*

We host two Trustee committee meetings each term. The first meeting has a focus on 'Finance, Audit and Risk' with the second half term meeting focussing on 'School Standards and Resources'. This is followed by a termly full Trustee meeting.

Our current approach to help maintain effective communication includes regular 'Trust Bulletins' issued to schools with details of important updates and actions. Schools also produce a termly, one-page report for trustees which is presented at the trustee 'standards and resources' meeting each term. We have an annually updated 3-year action plan in place that includes our Key Performance Indicators and a 'School to school' support matrix which summarises the areas of support and

development for each of the trust schools, which should form the heart of the trust's work going forward.

To date, the following 15 roles and services were established at the centre of the trust;

*Finance management software (Access)*

*HR service (EPM)*

*Payroll service (EPM)*

*Teacher's pensions management (EPM)*

*Clerking service (HES)*

*Legal support (Winckworth Sherwood)*

*Audit services (William Giles – external audit / Price Bailey – internal scrutiny)*

*Health and Safety Audit Service (RPA Insurance Scheme, 2021-22 academic year)*

*Site Condition Surveys, including Mechanical and Electrical (Barkers, 2022-23 academic year)*

*Risk Management Software (Risk Manager – includes asset register and site maintenance tools)*

*GDPR – DPO*

*Leadership CPD – Impetus Education (Ended 31.08.26)*

*Central trust website*

*CFO*

*CAO*

A small but growing number of services which are not centrally funded, but achieve best value and consistency as central contracts are also in place. Trust schools can be added to these contracts when their current contracts expire.

*Catering (Taylor Shaw) – 5 schools*

*Cleaning (Ridgecrest) – 4 schools*

In addition to the central services, the trust now holds and reviews over 50 central policies, including 23 statutory policies all schools are required to publish.

The trust made two further leadership appointments in September 2025. One Headteacher and Deputy Headteacher (St Joseph's Dagenham)

The Diocese of Brentwood have formed a Catholic Multi-Academy Working Group with the aim of reviewing the current organisation and networks of CMATs across the Diocese. This groups work will continue in 2026-27 under the direction of Bishop Alan and the new Diocesan Director of Education.

M. Corcoran

CAO

September 2026

*'Within a changing landscape of national educational policy and provision I believe we need to reinforce and develop the relationships between our schools. **We are at our best when we work together, for each other, in service of the common good, embracing both solidarity and subsidiarity.** This is essential to all decisions and actions undertaken by our Catholic schools'.*

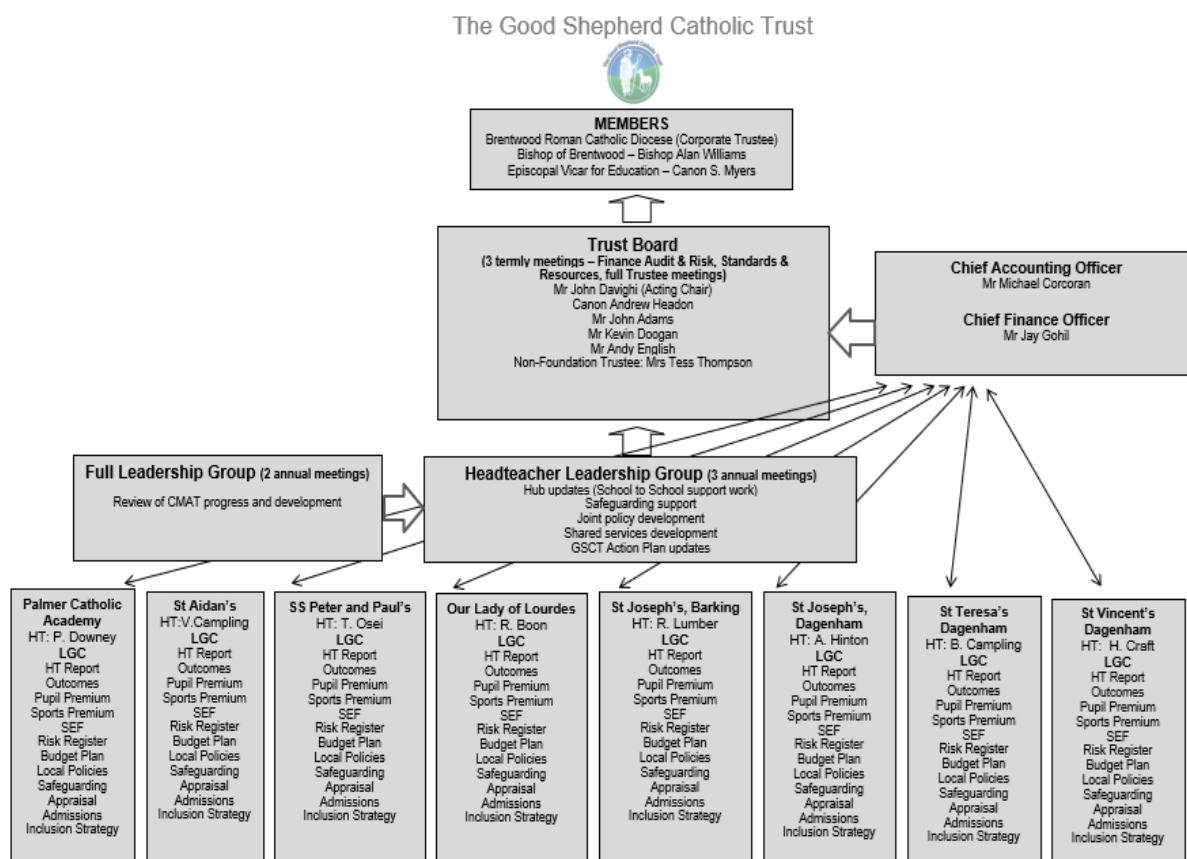
Bishop Alan's Pastoral Letter on 'Our Catholic Schools' - Education Sunday, 9 September 2018.

## Good Shepherd Catholic Trust Action Plan: 2026-2029

This action plan maps the following which will take shape over the next academic year:

1. Organisation chart
2. Summary of achievements to date 2025-26
3. Financial Sustainability Planning and SRMA Actions Timeline
4. Aims and Objectives 2026 – 2029 incorporating audit/scrutiny recommendations
5. Key Performance Indicators 2025-2028

### 1. Trustee Organisation Chart



## **2. Good Shepherd Catholic Trust... Achievements to date 2020-2026**

### **Staffing**

- New HT and DHT appointments in autumn 2025
- Senior leadership support for non-trust schools whilst Headship recruitment was completed
- Staff support across trust schools for finance (ABMs), site management and staff training purposes

### **Standards and Improvement**

- Trustees are provided with a termly Trustees Report by each school (collated by the CAO) summarising updates on standards, safeguarding, school improvement and Catholic life.
- Inspection outcomes (monitoring visits, Section 8 and CSI to date) show strong and improving schools within the trust. Improvement also supported by regular link visit notes
- Early development of the Subject Hubs to share good practice and plan school improvement priorities (Ongoing development priority for 2025-26)

### **Finance and central services**

- Business Managers part of an integrated and supportive team which meet on a regular basis
- Internal and external Audit processes in place (new providers procured in 2022-23 to carry out separate internal scrutiny in line with ATH)
- All our schools are audited and compliant with legislation. One 'red' ATH breach addressed in 2025-26.
- Cost savings across the central providers include significant % savings on standard services provided to 'stand-alone' schools/academies due to group purchase power. (most significant at present is HR, Payroll and Finance software, Legal support and Clerking)
- Central clerking service for main meetings across the trust schools is high quality
- Legal support retainer for all trust schools with Winckworth Sherwood sees significant use by a number of schools.
- There are a common set of 50 central statutory policies across all schools with 25 of those published on the trust website

### **Buildings and estate**

- Site Health and Safety audits undertaken by RPA, with online action plans now live for all trust schools
- Access to range of site, health and safety training and updated through the RPA academy insurance scheme's portal

### **Catholic Ethos**

- All our schools are good or outstanding in Section 48, with Catholic School Inspections (CSI) rolled out
- We have good links with our Parishes, Diocese and local community
- Trust Mass celebrated for fourth consecutive year in September 2025

### 3. Financial Sustainability Planning and SRMA Actions Timeline

| Dates                                                       | Actions                                                                                                                           | Notes                                                                                                                                                                                                          |
|-------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| June/July 2026                                              | Trustee and Finance Committee approval and Action Planning                                                                        | Completed and SRMA Action plan drawn up                                                                                                                                                                        |
| July – September 2026                                       | Staffing review and leadership/teaching reduction<br><b>FTE reduction; -7.9 FTE</b>                                               | EPM /HR to look at staffing FTEs and budgets                                                                                                                                                                   |
| 1 <sup>st</sup> July 2026 to 1 <sup>st</sup> September 2026 | Contract reviews and initial procurement exercises<br>Catering; 5 schools<br>Cleaning; 3 schools +1<br>Reprographics; 3 schools   | <b>Catering;</b> £48k saving over 3 years for 5 schools<br><b>Cleaning;</b> 106k over 3 years for 4 schools (SJD; £28k annual saving)<br><b>Reprographics;</b> SSPP;£25k over 5 years / TPCA;£12k over 5 years |
| July 2026                                                   | SRMA Report shared with two initial/priority schools for early 2026-27 planning                                                   | Completed – early planning with HR and finance for 2026-27 academic year discussed.                                                                                                                            |
| April to July 2026                                          | Termly budget review and planning meetings (SV/SA/SJB/ST)                                                                         | CFO and CAO completed with budget review and planning meetings with deficit schools. All four schools setting surplus budgets.                                                                                 |
| 7 <sup>th</sup> – 30 <sup>th</sup> September 2026           | Circulation of individual (personalised) SRMA report to 8 schools and trust meetings arranged                                     | Completed – reports circulated and discussed as part of Leadership Group meetings with follow up CAO/CFO meetings arranged.                                                                                    |
| September 2026                                              | ICFP Units shared and rolled out to two trial schools (TPCA and SS Peter and Pauls) who have most challenging financial forecasts | Booked – DfE ICFP training units booked by schools and trial schools to join Access (finance package) specific training on ICFP                                                                                |
| September – December 2026                                   | HR staff structure planning and Business Case planning for 1-2 priority schools                                                   | In progress                                                                                                                                                                                                    |

#### 4. Action Plan - Aims and Objectives 2026 – 2029

| Action Plan – Objectives Summary 2026-2029 |                                                             |                                                                                               |           |
|--------------------------------------------|-------------------------------------------------------------|-----------------------------------------------------------------------------------------------|-----------|
| No.                                        | Action                                                      | Summary                                                                                       | Completed |
| 1                                          | <b>SRMA Action</b>                                          | Reduce classroom teacher staffing across the trust academies                                  |           |
| 2                                          | <b>SRMA Action</b>                                          | Alignment with leadership cost benchmarks as a proportion of total teaching staff costs       |           |
| 3                                          | <b>SRMA Action</b>                                          | Integrate ICFP in budget setting process for target/trial schools                             |           |
| 4                                          | <b>SRMA Action</b>                                          | Review procurement strategy and planning for trust schools                                    |           |
| 5                                          | <b>SRMA Action</b>                                          | Formal Recovery Plans for priority deficit/in year deficit schools                            |           |
| 6                                          | <b>External Audit (2024-25 1 year amber or red actions)</b> | Monitor instances where invoices received during the year were added through accruals         |           |
| 7                                          | <b>External Audit (2024-25 1 year amber or red actions)</b> | GIAS checks for accurate appointment dates and lapsed terms                                   |           |
| 8                                          | <b>External Audit (2024-25 1 year amber or red actions)</b> | Salary update form for support staff (annually introduced in 2025-26)                         |           |
| 9                                          | <b>External Audit (2024-25 1 year amber or red actions)</b> | Business Interest Forms and confirmations to be updated – Members (in line with Directors)    |           |
| 10                                         | <b>Internal Scrutiny (2025-26) – Governance</b>             | Effectiveness (skills) tool to be widely used and one ‘self-assessment’ tool/format for trust | July 2026 |
| 11                                         | <b>Internal Scrutiny (2025-26) – Cyber</b>                  | Network safety testing/simulations using LGFL and other resources and contracts registers     | July 2026 |
| 12                                         | <b>Internal Scrutiny (2026-27) – Websites</b>               | 2026 website actions are addressed with relevant links and statutory documents                |           |
| 13                                         | <b>Internal Scrutiny (2026-27) – Estates</b>                | Estates strategy, AMP and comprehensive Contracts Register developed for 2026-27              |           |
| 14                                         | <b>GSCT Actions</b>                                         | Subject Hubs / MAT outreach and growth / EYFS and Phonics (reading) outcomes                  |           |
| 15                                         | <b>Catholic Life and Mission</b>                            | Diocesan PLA links and visits / RE Subject Hub impact on wider trust practice                 |           |

| SRMA/RECOVERY PLAN ACTION                                                                                                                                                                                      |                              |                                                                                                                                                                                                                                                                                                                                                                                 |                                                                                                                                                                                                                                                                        |                                                                                                                                                                                                                                              |
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| OBJECTIVE 1                                                                                                                                                                                                    |                              | 2026/7                                                                                                                                                                                                                                                                                                                                                                          | 2027/8                                                                                                                                                                                                                                                                 | 2028/9                                                                                                                                                                                                                                       |
| Reduce classroom teacher staffing by approximately 9 FTE to align with best practice benchmarks This adjustment will support bringing staffing ratios and cost metrics back within expected ranges, including. | ACTIONS                      | Complete school-by-school staffing review using pupil numbers, curriculum need, vacancies, natural turnover and best-practice benchmarks. Agree a Trust-wide approach to achieving the approximately 8 FTE reduction, prioritising vacancies, turnover and voluntary changes where possible. Reduction 8FTE staff across 4 Schools; SJB; 1 FTE SJD; 1 FTE TPCA; 4 FTE SA; 2 FTE | Review the impact of Year 1 staffing changes against pupil numbers, curriculum delivery, workload and budget forecasts. Continue reductions through natural turnover and restructuring where required, with early intervention where staffing remains above benchmark. | Complete the remaining staffing alignment required to bring schools consistently within agreed staffing and cost benchmarks. Refresh the workforce model annually so staffing levels respond to pupil numbers and sustainable affordability. |
|                                                                                                                                                                                                                | OUTCOMES                     | Clear baseline workforce plan for every school; agreed staffing reductions identified and reflected in budgets; approximately 9 FTE reduction planned/initiated without compromising statutory curriculum provision.                                                                                                                                                            | Staffing ratios and teaching-cost metrics move closer to agreed benchmarks; budget forecasts become more reliable and schools demonstrate active workforce management.                                                                                                 | Sustainable staffing model embedded across the Trust, with staffing levels routinely linked to pupil numbers, curriculum need and affordability.                                                                                             |
|                                                                                                                                                                                                                | TIMESCALE AND RESPONSIBILITY | Sep 2026–Jul 2027: CAO/Executive Team, CFO, HR and Headteachers; termly Board/LGC monitoring.                                                                                                                                                                                                                                                                                   | Sep 2027–Jul 2028: CAO/Executive Team, CFO, HR and Headteachers; termly workforce and finance review.                                                                                                                                                                  | Sep 2028–Jul 2029: CAO/Executive Team, CFO, HR and Headteachers; annual workforce review and Board assurance.                                                                                                                                |

| SRMA/RECOVERY PLAN ACTION                                                                                                                      |                      |                                                                                                                                                                                                  |                                                                                                                                                                                                                                            |                                                                                                                                                                                                                                     |
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| OBJECTIVE 2                                                                                                                                    |                      | 2026/7                                                                                                                                                                                           | 2027/8                                                                                                                                                                                                                                     | 2028/9                                                                                                                                                                                                                              |
| Alignment with leadership cost benchmarks as a proportion of total teaching staff costs across the trust with review of leadership structures. | ACTIONS              | Implement the planned ending of the EHT role for the three primary schools from 01.09.2026. Establish a baseline for leadership costs and review leadership structures against Trust benchmarks. | Review opportunities for shared/executive leadership across small or falling-roll primary schools as leadership vacancies, natural leavers and restructuring opportunities arise. Develop options and consult governors where appropriate. | Embed sustainable shared/executive leadership arrangements where appropriate, including opportunities created by Trust growth or new schools. Review the structure annually against pupil numbers, school need and cost benchmarks. |
|                                                                                                                                                | OUTCOMES             | Reduced leadership cost base and a clear baseline against which future leadership structures can be assessed.                                                                                    | Viable shared leadership options identified for relevant small/falling-roll schools, with changes aligned to natural turnover and school need.                                                                                             | Leadership structures are sustainable, proportionate and aligned with Trust growth, school context and agreed cost benchmarks.                                                                                                      |
|                                                                                                                                                | TIMESCALE AND PEOPLE | 01 Sep 2026–Jul 2027: CAO, CFO, HR and relevant Headteachers; Board oversight.                                                                                                                   | Sep 2027–Jul 2028: CAO, CFO, HR and Headteachers; review at each relevant vacancy/natural-leaver point.                                                                                                                                    | Sep 2028–Jul 2029: CAO, CFO, HR and Headteachers; annual structural and cost review.                                                                                                                                                |

| SRMA/RECOVERY PLAN ACTION                                                                                                                        |                      |                                                                                                                                                                                     |                                                                                                                                                                                           |                                                                                                                                                                      |
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| OBJECTIVE 3                                                                                                                                      |                      | 2026/7                                                                                                                                                                              | 2027/8                                                                                                                                                                                    | 2028/9                                                                                                                                                               |
| Integrate ICFP in budget setting process for one primary and one secondary school within the trust to trial impact of ICFP and budget management | ACTIONS              | Implement the ICFP trial in TPCA and SS Peter and Paul's for 2026-27. Train key staff, establish baseline staffing/cost data and monitor staffing adaptations and budget forecasts. | Evaluate the trial, refine templates and processes, and extend ICFP to additional schools where readiness is demonstrated. Use ICFP evidence in budget-setting discussions and challenge. | Embed ICFP within the Trust budget-setting cycle for all appropriate schools, with annual refresh of staffing assumptions, pupil forecasts and affordability checks. |
|                                                                                                                                                  | OUTCOMES             | Two trial schools use ICFP-informed staffing and budget forecasts; key staff understand the methodology and early lessons are documented.                                           | ICFP is used more consistently across the Trust and improves the quality of staffing decisions, scenario planning and budget challenge.                                                   | ICFP becomes a routine Trust-wide budget management tool, supporting sustainable staffing and earlier identification of financial pressures.                         |
|                                                                                                                                                  | TIMESCALE AND PEOPLE | Sep 2026–Jul 2027: CFO/CAO Finance Team, school leaders and ICFP-trained staff; termly monitoring.                                                                                  | Sep 2027–Jul 2028: CFO/CAO Finance Team with Headteachers; evaluation by autumn term and phased extension through the year.                                                               | Sep 2028–Jul 2029: CFO/CAO Finance Team and all relevant school leaders; annual budget cycle and Board review.                                                       |

| SRMA/RECOVERY PLAN ACTION                                                                     |                      |                                                                                                                                                                                                                 |                                                                                                                                                                                     |                                                                                                                                                                           |
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| OBJECTIVE 4                                                                                   |                      | 2026/7                                                                                                                                                                                                          | 2027/8                                                                                                                                                                              | 2028/9                                                                                                                                                                    |
| Review procurement strategy and planning for trust schools to achieve further joint contracts | ACTIONS              | Review the Master Contract Register, identify priority joint-contract opportunities and strengthen procurement planning. Progress Year 1 opportunities: catering/cleaning, reprographics and MIS.               | Progress Year 2 opportunities, including energy procurement and further participation in the Trust catering/cleaning contract. Benchmark supplier performance and savings achieved. | Complete the three-year procurement programme, identify the next cycle of joint contracts and ensure contracts, renewals, savings and compliance are routinely monitored. |
|                                                                                               | OUTCOMES             | Stronger compliance, assurance and trustee confidence, with Year 1 procurement opportunities progressed and savings identified. The Trust works towards potential trust-wide savings of £330k over three years. | Further schools participate in joint contracts; energy procurement is improved; cumulative savings and value for money are evidenced.                                               | Procurement is embedded as a planned Trust-wide activity, with the three-year savings ambition reviewed and a forward procurement pipeline maintained.                    |
|                                                                                               | TIMESCALE AND PEOPLE | Sep 2026–Jul 2027: CFO/CAO Procurement Lead, central team and schools; quarterly contract review.                                                                                                               | Sep 2027–Jul 2028: CFO/CAO Procurement Lead and school representatives; annual savings report to Board.                                                                             | Sep 2028–Jul 2029: CFO/CAO Procurement Lead; annual procurement strategy and contract-renewal cycle.                                                                      |

| SRMA/RECOVERY PLAN ACTION                                                                               |                      |                                                                                                                                                                                                                              |                                                                                                                                                                                       |                                                                                                                                                                                           |
|---------------------------------------------------------------------------------------------------------|----------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| OBJECTIVE 5                                                                                             |                      | 2026/7                                                                                                                                                                                                                       | 2027/8                                                                                                                                                                                | 2028/9                                                                                                                                                                                    |
| Formal Recovery Plans for priority deficit/in year deficit schools for formal LGC and Board monitoring. | ACTIONS              | Identify priority deficit and in-year deficit schools and agree formal recovery plans with clear financial baselines, assumptions, actions, milestones and responsible officers. Present plans for LGC and Board monitoring. | Review recovery plans termly, track delivery against savings/income assumptions and revise actions where required. Strengthen support and intervention for schools not on trajectory. | Consolidate successful recovery measures into sustainable school budgets and maintain formal monitoring for any school still at risk. Capture lessons learned for future budget planning. |
|                                                                                                         | OUTCOMES             | Every priority deficit/in-year deficit school has an approved recovery plan with measurable actions and clear governance oversight.                                                                                          | Schools demonstrate measurable movement towards balanced budgets, with variances identified early and corrective action taken promptly.                                               | Priority schools achieve or move materially towards sustainable in-year balance, with recurring controls embedded in normal budget management.                                            |
|                                                                                                         | TIMESCALE AND PEOPLE | Autumn 2026: CFO, CAO /Executive Team, Headteachers and LGC Chairs; Board approval/monitoring each term.                                                                                                                     | 2027/28: CFO/CAO and Headteachers; termly recovery review and Board reporting.                                                                                                        | 2028/29: CFO/CAO and Headteachers; termly monitoring until sustainable balance is secured.                                                                                                |

| EXTERNAL AUDIT – ACTIONS                                                                                                                                                                                          |                      |                                                                                                                                               |                   |                   |
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| OBJECTIVE 6                                                                                                                                                                                                       |                      | 2024/5 (NOV 2025)                                                                                                                             | 2025/6 (NOV 2026) | 2026/7 (NOV 2027) |
| 3 instances where invoices received during the year were being added to the finance system through accruals as opposed to being posted to the finance system at the invoice date and showing as a trade creditor. | ACTIONS              | All invoices are recorded on the finance system on the date that the invoices are dated and in the corresponding periods to the invoice date. |                   |                   |
|                                                                                                                                                                                                                   | OUTCOMES             | Compliant with audit requirements.                                                                                                            |                   |                   |
| <b>HYPER LINK TO AUDIT PLAN</b>                                                                                                                                                                                   | TIMESCALE AND PEOPLE | ABMs / Finance Leads                                                                                                                          |                   |                   |

| EXTERNAL AUDIT – ACTIONS                                                                                                                                                                           |                      |                                                                                                                                                                           |                   |                   |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|-------------------|
| OBJECTIVE 7                                                                                                                                                                                        |                      | 2025/6 (NOV 2025)                                                                                                                                                         | 2026/7 (NOV 2026) | 2027/8 (NOV 2027) |
| GIAS regularly checked for accurate appointment dates and lapsed terms – all LGC and Trustee appointments accurately recorded. Companies House 14-day update window for trustees to be adhered to. | ACTIONS              | GIAS monthly check at trust and school level to confirm and amend any start/end dates for the LGCs/Trustees and Companies House 14-day amendment window to be adhered to. |                   |                   |
|                                                                                                                                                                                                    | OUTCOMES             | Compliant with audit requirements and ATH requirements.                                                                                                                   |                   |                   |
| <b>HYPER LINK TO EXTERNAL AUDIT PLAN</b>                                                                                                                                                           | TIMESCALE AND PEOPLE | CAO/ HTs                                                                                                                                                                  |                   |                   |

| EXTERNAL AUDIT – ACTIONS                                                                                                                             |                      |                                                                                                                            |                   |                   |
|------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|----------------------------------------------------------------------------------------------------------------------------|-------------------|-------------------|
| OBJECTIVE 8                                                                                                                                          |                      | 2025/6 (NOV 2025)                                                                                                          | 2026/7 (NOV 2026) | 2027/8 (NOV 2027) |
| Salary update form for support staff (annually introduced in 2025-26) to be held for all staff and all relevant ID documents required to be on file. | ACTIONS              | All documentation within the personnel files, including new support staff annual salary statements.                        |                   |                   |
|                                                                                                                                                      | OUTCOMES             | Physical staff/personnel files reflect the HR and payroll information held on central portals with up-to-date information. |                   |                   |
| <b>HYPER LINK TO EXTERNAL AUDIT PLAN</b>                                                                                                             | TIMESCALE AND PEOPLE | ABMs/Finance staff and CAO.                                                                                                |                   |                   |

| EXTERNAL AUDIT – ACTIONS                                                                                            |                      |                                                                                                                                                                       |                   |                   |
|---------------------------------------------------------------------------------------------------------------------|----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|-------------------|
| OBJECTIVE 9                                                                                                         |                      | 2025/6 (NOV 2025)                                                                                                                                                     | 2026/7 (NOV 2026) | 2027/8 (NOV 2027) |
| Business Interest Forms and confirmations to be updated for Diocesan Members in line with trustees and LGC members. | ACTIONS              | Central clerking portal to contain the confirmations for Business Register Interests for the Diocesan Members in line with practice for trustees and local governors. |                   |                   |
|                                                                                                                     | OUTCOMES             | Process for governors, trustees and members aligned and updated on an annual basis.                                                                                   |                   |                   |
| <b>HYPER LINK TO EXTERNAL AUDIT PLAN</b>                                                                            | TIMESCALE AND PEOPLE | CAO/Governance professional/clerk.                                                                                                                                    |                   |                   |

| INTERNAL SCRUTINY - GOVERNANCE REVIEW ACTIONS (2025)                                                                                                                                                                                               |                      |                                                                                                                                                                                                                                                              |                                                                                                                                                                                                          |                                                                                                                                                                   |
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| OBJECTIVE 10                                                                                                                                                                                                                                       |                      | 2026/7                                                                                                                                                                                                                                                       | 2027/8                                                                                                                                                                                                   | 2028/9                                                                                                                                                            |
| <p>1. Governor hub 'effectiveness tool' to be utilised by all trust and governor boards as a skills and effectiveness audit</p> <p>2. Adopt one trust 'self-evaluation' process to be completed and reviewed (eg; DfE Mat Assurance Framework)</p> | ACTIONS              | Roll out the Governor Hub effectiveness tool to all Trust and governor boards as a skills and effectiveness audit. Adopt one Trust self-evaluation process and establish a baseline, using an appropriate framework such as the DfE MAT Assurance Framework. | Repeat/refresh the board skills audit where appropriate and use findings to target governor recruitment, induction and development. Complete annual Trust self-evaluation and agree improvement actions. | Embed annual board effectiveness and Trust self-evaluation into governance cycles, with evidence of completed actions and impact reported to the relevant boards. |
|                                                                                                                                                                                                                                                    | OUTCOMES             | All boards have a consistent skills/effectiveness baseline and a common self-evaluation approach; gaps and development priorities are identified.                                                                                                            | Governance development is targeted to identified needs and annual self-evaluation produces clear, monitored improvement actions.                                                                         | Governance effectiveness is demonstrably strengthened, with annual evaluation, skills planning and follow-up actions embedded as business-as-usual.               |
| <b>HYPER LINK TO INTERNAL SCRUTINY PLAN</b>                                                                                                                                                                                                        | TIMESCALE AND PEOPLE | Autumn 2026–Jul 2027: Governance Lead/Clerk, Trustees and Governors; completion and review within the academic year.                                                                                                                                         | 2027/28: Governance Lead/Clerks, Trustees and Governors; annual review cycle.                                                                                                                            | 2028/29: Governance Lead/Clerks, Trustees and Governors; annual review with Board assurance.                                                                      |

| INTERNAL SCRUTINY - CYBER SECURITY REVIEW ACTIONS (2025)                                                                                                                                                                                                                                                                                                                                                                                      |                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                                                                                                                                                                                                                        |                                                                                                                                                                                                |
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| OBJECTIVE 11                                                                                                                                                                                                                                                                                                                                                                                                                                  |                      | 2026/7                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | 2027/8                                                                                                                                                                                                                                                 | 2028/9                                                                                                                                                                                         |
| <p>1. Phishing Simulations/penetration testing/LGFL Security Scorecard testing carried out in all trust schools in line with budgets available. Ensure that all Schools perform regular testing or scoring of their network safety and that it is logged.</p> <p>2. Trust central contracts register to reflect licence agreement for IT including anti-virus and malware protection. Standardised Contracts Register across all Schools.</p> | ACTIONS              | Complete phishing simulations and penetration testing across Trust schools where budget allows – or alternative of the LGFL Security Test Scorecard; establish a central log of tests, results and actions. Review the central IT contracts register and ensure anti-virus/malware licences and relevant agreements are recorded consistently.                                                                                                                                    | Repeat simulations and penetration testing, or update LGFL security Scorecards and compare with previous safety ratings - track remediation actions and standardise evidence across schools. Review IT contracts and license renewals ahead of expiry. | Embed an annual cyber assurance cycle covering testing, staff awareness, remediation and contract/licence assurance, with trends and outstanding risks reported to Trust leadership and Board. |
|                                                                                                                                                                                                                                                                                                                                                                                                                                               | OUTCOMES             | <p>All schools have baseline cyber-testing evidence and a central record of actions; IT licence and protection arrangements are visible and consistently documented.</p> <p><a href="https://landing.lgfl.net/security-school-report?hsCtaTracking=4c248d9f-af56-4765-b5e3-6640bcf78ea7%7Cc89a6584-d39d-4b43-aac0-567d8b9a1e21">https://landing.lgfl.net/security-school-report?hsCtaTracking=4c248d9f-af56-4765-b5e3-6640bcf78ea7%7Cc89a6584-d39d-4b43-aac0-567d8b9a1e21</a></p> | Improved staff awareness and reduced repeat vulnerabilities; outstanding remediation is monitored to completion and contracts are standardised.                                                                                                        | Sustainable cyber assurance process in place across the Trust, with regular testing, documented remediation and clear governance oversight.                                                    |
| <b>HYPER LINK TO INTERNAL SCRUTINY PLAN</b>                                                                                                                                                                                                                                                                                                                                                                                                   | TIMESCALE AND PEOPLE | Sep 2026–Jul 2027: IT Lead/Provider, school leaders and staff; termly risk/action review based on scorecard ratings or network testing                                                                                                                                                                                                                                                                                                                                            | 2027/28: IT Lead/Provider and schools; scheduled testing and six-monthly review.                                                                                                                                                                       | 2028/29: IT Lead/Provider and schools; annual assurance cycle with Board reporting.                                                                                                            |

| INTERNAL SCRUTINY - WEBSITES REVIEW ACTIONS (2026)                                                                                                             |                      |                                                                                                                                                                                                                         |                                                                                                                                                                         |                                                                                                                                                     |
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| OBJECTIVE 12                                                                                                                                                   |                      | 2026/7                                                                                                                                                                                                                  | 2027/8                                                                                                                                                                  | 2028/9                                                                                                                                              |
| Ensure all 2026 website actions are addressed with relevant links and statutory documents updated – with a follow up review across the trust sites in 2027-28. | ACTIONS              | Complete all 2026 website review actions: update statutory documents, relevant links and required information across Trust and school websites. Establish a central compliance checklist and named owner for each site. | Carry out the planned follow-up review across Trust sites, record any gaps and complete corrective actions. Introduce a routine termly/annual website compliance check. | Maintain full compliance through an embedded website review cycle, with changes to statutory requirements reflected promptly and evidence retained. |
|                                                                                                                                                                | OUTCOMES             | All identified 2026 website actions are completed or formally tracked, with statutory information and links current.                                                                                                    | Follow-up review confirms sustained compliance or identifies and closes remaining gaps; responsibility for updates is clear.                                            | Website compliance is maintained consistently across the Trust with a documented audit trail and prompt updating process.                           |
| <b>HYPER LINK TO INTERNAL SCRUTINY PLAN</b>                                                                                                                    | TIMESCALE AND PEOPLE | Sep 2026–Jul 2027: Communications/IT Lead, Trust office and school website owners; monthly completion tracking until closed.                                                                                            | 2027/28: Communications/IT Lead and school website owners; formal cross-Trust review during the year.                                                                   | 2028/29: Communications/IT Lead and school website owners; annual compliance review plus updates as required.                                       |

| INTERNAL SCRUTINY - ESTATES MANAGEMENT REVIEW ACTIONS (2026)                                                                                                                                                                                                               |                      |                                                                                                                                                                                                                                      |                                                                                                                                                                                                                       |                                                                                                                                                                                        |
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| OBJECTIVE 13                                                                                                                                                                                                                                                               |                      | 2026/7                                                                                                                                                                                                                               | 2027/8                                                                                                                                                                                                                | 2028/9                                                                                                                                                                                 |
| <p>1. Compile an Estates Strategy and procedures document for the GSCT</p> <p>2. Full Asset Management Plan for the GSCT with 3 year costed estates plan</p> <p>3. Update the trust contracts register to include all estates management and statutory check suppliers</p> | ACTIONS              | Compile the GSCT Estates Strategy and procedures document; begin the full Asset Management Plan and three-year costed estates plan. Update the Trust contracts register to include estates management and statutory-check suppliers. | Complete and action the Asset Management Plan, prioritising health and safety, statutory compliance, condition, lifecycle and affordability. Use the three-year costed plan to inform budgets and capital priorities. | Review and refresh the Estates Strategy and Asset Management Plan using condition, compliance and expenditure data. Update the three-year forward plan and contract register annually. |
|                                                                                                                                                                                                                                                                            | OUTCOMES             | Clear Trust-wide estates strategy, procedures, asset baseline and supplier/contract register established; priority risks and costs identified.                                                                                       | Costed estates priorities inform budget and capital planning; statutory compliance and supplier assurance are systematically monitored.                                                                               | Sustainable, risk-based estates management embedded across the Trust, with an annually refreshed three-year costed plan.                                                               |
| <b>HYPER LINK TO INTERNAL SCRUTINY PLAN</b>                                                                                                                                                                                                                                | TIMESCALE AND PEOPLE | Sep 2026–Jul 2027: Estates Lead/CFO, school leaders and relevant contractors; quarterly compliance/plan review.                                                                                                                      | 2027/28: Estates Lead/CFO and school leaders; annual capital and condition review.                                                                                                                                    | 2028/29: Estates Lead/CFO and school leaders; annual refresh and Board assurance.                                                                                                      |

| GENERAL - TRUST ACTIONS AND OBJECTIVES 2026-27                                                                                                                                                                                                                               |                      |                                                                                                                                                                                                                                                              |                                                                                                                                                                                                          |                                                                                                                                                                                                                         |
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| OBJECTIVE 14                                                                                                                                                                                                                                                                 |                      | 2026/7                                                                                                                                                                                                                                                       | 2027/8                                                                                                                                                                                                   | 2028/9                                                                                                                                                                                                                  |
| <p>1. Develop the subject hub support schools for 2026-27 to support</p> <p>2. Outreach work to wider Diocesan school network in line with trust re-grouping plans</p> <p>3. Phonics, EYFS, reading improvement focus (pending 2026 data outcomes check for the schools)</p> | ACTIONS              | Develop subject hub support schools and agree initial priorities for 2026-27. Begin outreach to the wider Diocesan school network in line with Trust re-grouping plans. Following review of 2026 data, target phonics, EYFS and reading improvement support. | Evaluate the impact of subject hubs and targeted improvement work. Extend effective practice and peer support across more schools, using assessment and quality-assurance evidence to refine priorities. | Embed subject hubs and Diocesan outreach as sustainable school-improvement networks. Use Trust-wide performance data to target further phonics, EYFS and reading improvement and share demonstrably effective practice. |
|                                                                                                                                                                                                                                                                              | OUTCOMES             | Subject hubs have defined roles and support activity; initial outreach is established; improvement priorities are confirmed from 2026 evidence.                                                                                                              | More schools access effective subject support and collaboration; targeted improvement work shows measurable progress in identified areas.                                                                | Collaborative school improvement is embedded, with sustained improvements in phonics, EYFS and reading where identified as priorities and clear evidence of impact.                                                     |
|                                                                                                                                                                                                                                                                              | TIMESCALE AND PEOPLE | Sep 2026–Jul 2027: CEO/Director of Education, subject leads, Headteachers and school improvement staff; termly review.                                                                                                                                       | 2027/28: Director of Education, subject hubs and Headteachers; termly impact review using school data.                                                                                                   | 2028/29: Director of Education, subject hubs and Headteachers; annual evaluation and next-step planning.                                                                                                                |

## CATHOLIC LIFE - TRUST ACTIONS AND OBJECTIVES 2026-27

| OBJECTIVE 15                                                                                                                                                                                                                                                                                     |                      | 2026/7                                                                                                                                                                                                                                                                                                                                                                                                    | 2027/8                                                                                                                                                                                                                                                                                                                                               | 2028/9                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>Strengthen Catholic ethos and Diocesan links for the GSCT including;</p> <p>Stronger Diocesan links with CAO and PLA to collaborate and development of the RE Subject Hub School over a 3 year period. Impact; all areas of Catholic Life, inspection and development to be strengthened.</p> | ACTIONS              | <ul style="list-style-type: none"> <li>Establish a joint PLA–CAO Catholic Life improvement cycle for all 8 GSCT schools.</li> <li>Complete a shared baseline of Catholic Life, RE, mission/ethos, prayer and worship, leadership and inspection readiness.</li> <li>Agree a common schedule and protocol for joint/linked school improvement and support visits, with clear follow-up actions.</li> </ul> | <ul style="list-style-type: none"> <li>Deliver planned joint/linked support visits across all 8 schools, prioritising agreed areas from the baseline and school self-evaluation.</li> <li>Use RE Subject Hub school to develop the outreach for trust schools</li> </ul>                                                                             | <ul style="list-style-type: none"> <li>Review the impact of the three-year PLA–CAO partnership using evidence from all 8 schools, visit records and school self-evaluation.</li> <li>Identify remaining priorities and agree a sustainable Catholic Life improvement cycle for the next phase.</li> <li>Capture and share effective practice that strengthens the distinctive Catholic identity of the Trust as a whole and review the impact of the RE Hub school for 29/30</li> </ul> |
|                                                                                                                                                                                                                                                                                                  | OUTCOMES             | <ul style="list-style-type: none"> <li>All 8 schools have a clear Catholic Life baseline and agreed improvement priorities.</li> <li>PLA and CAO have a shared understanding of strengths, risks and support needs in each school.</li> <li>A consistent visit, feedback and follow-up process is in place, strengthening support and challenge.</li> </ul>                                               | <ul style="list-style-type: none"> <li>Schools receive timely, consistent and evidence-informed diocesan and Trust support.</li> <li>Leaders demonstrate greater confidence in evaluating Catholic Life and responding to challenge with leadership of the trust's RE Hub showing impact on consistency and strength of RE/Catholic Life.</li> </ul> | <ul style="list-style-type: none"> <li>Evidence shows sustained improvement in Catholic Life and greater consistency across the 8 schools.</li> <li>Schools are better prepared for Catholic inspection and have stronger processes for self-evaluation and improvement planning.</li> <li>Catholic mission and identity are increasingly visible in leadership, curriculum, prayer and worship, community life and decision-making.</li> </ul>                                         |
|                                                                                                                                                                                                                                                                                                  | TIMESCALE AND PEOPLE | <ul style="list-style-type: none"> <li>Autumn 2026: agree framework, baseline and visit calendar.</li> <li>Lead: PLA + CAO; involve Headteachers and RE/Catholic Life leaders in all 8 schools.</li> </ul>                                                                                                                                                                                                | <ul style="list-style-type: none"> <li>Termly joint review of priorities and visit findings.</li> <li>Lead: PLA + CAO; Headteachers/RE leads; Trust/Diocesan colleagues as appropriate</li> <li>Allocated Subject Hub school reviews outreach work and impact on other catholic academies.</li> </ul>                                                | <ul style="list-style-type: none"> <li>Autumn–Spring 2028/9: impact review and targeted follow-up visits.</li> <li>Lead: PLA + CAO; Headteachers/RE leads across all 8 schools.</li> <li>Review and update the RE Subject Hub school as necessary based on 3 year work and impact on other trust schools.</li> </ul>                                                                                                                                                                    |

## 5. Key Performance Indicators 2025-2028

**Finance KPIs and Ratings;** The Trust will maintain strong financial stewardship through balanced budgets, robust cash and reserves management, effective cost control, value for money and full compliance, while ensuring resources are directed towards the educational needs of pupils. The Trust currently comprises **one secondary and seven primary schools**, and its stated approach emphasises providing central services where these can be delivered more effectively and economically at Trust level.

| KPI                           | 2026–27 Target Rating                                  | RAG     | 2027-28 Target Rating                                  | RAG     |
|-------------------------------|--------------------------------------------------------|---------|--------------------------------------------------------|---------|
| Overall budget position       | Deliver within approved budget                         | ● Green | Deliver within approved budget                         | ● Green |
| In-year deficit/surplus       | Balanced budget / planned surplus                      | ● Green | Balanced budget / planned surplus                      | ● Green |
| Trust cash position           | Maintain minimum 2 months' operating cover             | ● Green | Maintain minimum 2 months' operating cover             | ● Green |
| General reserves              | Build/maintain reserves at policy level                | ● Amber | Build/maintain reserves at policy level                | ● Amber |
| Staff costs as % of income    | Trust Schools staffing cost to total income below 80%  | ● Amber | Trust Schools staffing cost to total income below 80%  | ● Green |
| Central Trust costs           | ≤ agreed central-service budget                        | ● Green | ≤ agreed central-service budget                        | ● Green |
| Capital expenditure           | Prioritised against educational need and affordability | ● Green | Prioritised against educational need and affordability | ● Green |
| Value for money / procurement | Annual savings/efficiency programme                    | ● Green | Annual savings/efficiency programme                    | ● Green |
| Financial compliance          | 100% submitted on time                                 | ● Green | 100% submitted on time                                 | ● Green |
| Audit / internal controls     | No significant control weaknesses (Red)                | ● Green | No significant control weaknesses (Red)                | ● Green |
| Financial forecasting         | 3-year forecast updated termly                         | ● Green | 3-year forecast updated termly                         | ● Green |

### Overall finance rating

| Year    | Overall Rating    | Key judgement                                                                                                                                                                                                                                                                                                                                     |
|---------|-------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 2026–27 | ● / ● Amber/Green | Maintain balanced budgets, strengthen reserves from low of 0.45% (2025-26), improve efficiency and ensure sustainable investment across schools to a minimum of 1.34% (2026-27) and 3.4% (2027-28) working towards the trust's recommended reserve level of 5%.<br>Address staffing costs to total income % at 3 academies so it is 80% or lower. |