



## Introduction and context

The Diocese of Worcester Multi Academy Trust (DoWMAT) is a Diocese trust that was established in 2016 and comprises 15 church schools across the Diocese of Worcester including schools in Evesham, Pershore, Malvern, Kidderminster and Dudley. Elements Diocesan Learning Trust (Elements) is also a Diocese trust that was established in 2021 and comprises 5 church schools in Dudley. As Diocese trusts, Directors and trust leaders have worked closely alongside one another for the past 6 years. As Diocese trusts, there are many similarities both in vision, values, governance and structures. Importantly, both trusts whilst supporting their schools, respect and value the unique identity and autonomy of each.

In October 2025, Elements and DoWMAT jointly announced that both trusts had positively decided to explore the possibility of a voluntary merger following a close working relationship between the two Trust Boards and CEOs and strong reciprocal relationships as Diocese sponsored trusts. A Joint Committee representing both Trust Boards was formed to scope and consider the potential merger. When the Elements' CEO, Sarah Riley, retired in December 2025 both Trust Boards agreed that Vicki Shelley would lead Elements as their Interim CEO alongside her substantive post as DoWMAT CEO. This interim post was approved by the Department for Education (DfE).

## Diocese and Department for Education Approvals

Prior to formal consultation, the Joint Committee (Chaired by Tim Reid, Diocesan Director of Education) has worked alongside the Diocese, Department for Education and both Trust Boards to assess whether a merger is the right choice for both. As part of this process, approval for the merge has been sought and granted from the Diocesan Board of Education and the Department for Education. Due Diligence has also been undertaken by both trusts with both agreeing to move to a formal consultation stage with all stakeholders.

## Formal consultation

Formal consultation will run from Friday 1<sup>st</sup> May to Monday 1<sup>st</sup> June 2026 and will provide opportunities for feedback from all stakeholders including staff, parents, governors and wider partners. Following this public consultation with all stakeholders, the Trust Boards of both Elements and DoWMAT will independently decide if the merger should go ahead.

As part of the proposed merger process, many questions have already arisen, the answers to which have been shared below. Following the end of the consultation period, we anticipate being able to update this document and answer further questions as they arise and share these with all stakeholders. We thank you for taking the time to read these as part of the consultation.

A handwritten signature in black ink that reads "V. Shelley".

Vicki Shelley

Interim CEO Elements  
CEO DoWMAT

A handwritten signature in black ink that reads "D. Reeson".

David Reeson

Elements Trust Board Chair

A handwritten signature in black ink that reads "Chris Stephens".

Chris Stephens

DoWMAT Trust Board Chair

## Frequently Asked Questions (FAQs) to date

FAQ	Trust Response
<p>1. How will the merger benefit the pupils in our schools?</p>	<p>There are a number of ways that this merger will benefit our pupils.</p> <ul style="list-style-type: none"> <li>• School improvement is at the heart of both trusts. Each trust has specific expertise, and a merger would provide increased capacity for school improvement and widen the scope of work with an increased pool of staff to carry out school improvement work. This will help to further drive forward teaching excellence in our classrooms across our schools, for the benefit of our pupils through improved outcomes.</li> <li>• Financial planning and greater economies of scale will ensure long term benefits by making scarce resources for our pupils go further. For example, the costs of one CEO will be saved as Sarah Riley has already retired.</li> <li>• Larger trusts benefit from other financial gains, e.g. receiving guaranteed SCA (School Condition Allocation) funding which is an annual grant to support the maintenance and upkeep of our school buildings. This helps to ensure that our pupils are learning in the environments that they deserve. Both trusts currently rely on CIF (Condition Improvement Fund) bids which are an annual competitive bidding round with no guarantee of funds.</li> </ul> <p>The merger will not interfere with the educational provision in any of our schools. It will enhance what we currently do. The way that parents/carers interact with their child’s school will not change</p> <p>There will be more opportunities for enhancing the pupils’ experiences particularly in areas such as sports, music, arts and languages.</p>
<p>2. How will the merger benefit staff in our schools?</p>	<p>We believe that the merging of both trusts will bring benefits for our staff as well as for our pupils.</p> <p>Through increased collaboration, specialist networks and groups, staff will have access to enhanced best practice sharing, resources and training. This will be for teaching and support staff across a number of areas e.g. subject groups, administrative groups and practitioner specialisms.</p> <p>Professional development opportunities for all staff will be enriched and strengthened whilst new opportunities for career enhancement will be provided.</p> <p>Peer support networks will provide additional support for all staff.</p> <p>Enhanced collaborative support will be in place for national changes such as the new national curriculum which will be implemented from 2028.</p>

	<p>A combined central team will strengthen the support and service offered to Headteachers and schools across school improvement, SEND, governance, operations, finance, IT, HR and recruitment and the school estate.</p> <p>Both trusts will continue to benefit from the highly renowned school improvement services provided by the Diocese of Worcester Education team. An enlarged trust will increase the capacity for impactful contributions to enhance this e.g. strengthened and distributed leadership of key projects on sustainable schools, racial justice and ECTs networks as part of the Diocese priorities.</p>
<p>3. What are the overall advantages of the proposed merger?</p>	<p>As aforesaid, first and foremost, we believe it would further enhance the educational opportunities and experiences our pupils and staff receive. This includes:</p> <ul style="list-style-type: none"> <li>• Both current trusts would benefit from working with a wider range of colleagues, enhancing professional development opportunities and strengthening recruitment and retention of high-quality staff. A larger trust is able to provide more pathways and diverse opportunities for staff to enhance their careers and progress.</li> <li>• Combining the two Trust Boards and the central teams will strengthen governance by widening the range of skills and expertise.</li> <li>• Combining the expertise of our central teams will provide benefits for all and improved central services.</li> <li>• The similarity of vision and values is an enabler in combining the two trusts which have already collaborated in several ways, a shift accelerated by the joint CEO from January 2026.</li> <li>• The merger will offer greater operational efficiency, financial stability and resilience through economies of scale, additional grants such as the aforementioned SCA and more effective procurement. It is in line with the DfE’s current thinking and achieves the growth ambitions of both trusts.</li> </ul>
<p>4. Will the trust be too big with 20 schools?</p>	<p>No. Although it will be relatively large the current trend nationally and promoted by the DfE is to build capacity and grow. DoWMAT has 15 schools in the trust and relationships between Headteachers and colleagues are known for being collaborative, caring and supportive. Due to the distance between schools, the trust provides opportunities for all staff to come together both online and in person and also to benefit from smaller regional hubs such as in Pershore, Malvern and Evesham. This model works well.</p> <p>Elements has a distinct Dudley identity but this exists within the broader one of the Diocese and therefore will continue to maximise local collaboration whilst benefitting from collaboration further across the merged trust. Headteachers already work closely together with strong relationships and increasing opportunities for collaboration between school staff. Bringing the trusts together will strengthen both.</p>

<p>5. What matters have been considered when exploring whether the trusts should merge?</p>	<p>Both trusts have considered the following areas:</p> <ol style="list-style-type: none"> <li>1. Finances - Due Diligence has been completed by an external finance company to both trusts and enabled the Joint Committee to agree that a merge makes financial sense.</li> <li>2. SRMA (School Resource Management Advisor) reports by the DfE for both trusts and all their schools have been completed.</li> <li>3. Financial submission of three year forecasts to the DfE as part of their approval.</li> <li>4. HR</li> <li>5. Condition Surveys of the Estate</li> <li>6. Quality of Education and Safeguarding</li> <li>7. Reputation</li> <li>8. IT</li> </ol> <p>Findings to date have been shared with Directors and have informed their decision making.</p>
<p>6. Have the trusts looked at other alternatives to trust merge?</p>	<p>A merge offers both trusts the best way to realise their growth ambitions rather than adding individual schools incrementally. However, over time other schools may be attracted to our MAT and we would consider each one on its merits in terms of whether it would add value to the schools and the wider trust.</p>
<p>7. How will the central team be structured?</p>	<p>Both Trust Boards have agreed that Vicki Shelley will be the permanent, substantive CEO, should the merger proceed. The merged central team will be restructured but both existing central teams are small with no redundancies necessary. Both trusts take 5% top slice to fund the central services.</p>
<p>8. Will the central team staff be required to change their place of work?</p>	<p>The Trust will retain two offices – one in Dudley and one in Pershore; both of these will be on school sites to keep costs low and money in schools. There is no need to change places of work although the central team already travel between schools currently.</p>
<p>9. The proposal is for two different trusts with two different names and vision and values to merge. How will this work?</p>	<p>The proposed merger of the two trusts, each with their own names, vision and set of values, will be carefully managed to ensure a smooth integration.</p> <p>As Church of England Diocese trusts, both vision and values of each reflect the Church of England vision for education whilst respecting the individual identity of schools. There is already strong alignment between them which will serve as the foundation for the next steps in the merger.</p> <p>The names, vision and values will be reviewed in conjunction with stakeholders to create a unified identity for the merged trust which reflect the values and vision that are shared by all parties. This merger is a great opportunity to reflect on and refresh the vision, values, and ethos of the combined trust. This will be a collaborative process, ensuring that all voices are heard and that the new merged entity reflects the best of both trusts.</p>

10. Who makes the decision on the final proposal?	Each Trust Board will independently make a decision if the merger will proceed based on the outcomes of the due diligence process and consultation with all stakeholders. It is expected that this decision will be made by both Trust Boards in June 2026.
11. What is the proposed timescale?	<p>This decision will be informed by a final review of the due diligence process to date and a review of the feedback received from this consultation. Should a decision to merge be agreed, it is anticipated that the new trust will be established for September 2026; both the DfE and Diocese have given their approvals.</p> <p>However, legal and HR processes can take some time and be subject to delays so we will keep stakeholders informed of any changes to these proposed timescales.</p>
12. What will this mean for staff?	At the point of the merger (proposed for 1 September 2026), Elements Trust staff will transfer to be formally employed by DoWMAT. As with any merger, there is always a 'transferring' trust and a 'receiving' trust; in accordance with legal frameworks. Elements is the 'transferring' trust as there are a smaller number of schools and staff to transfer. Elements Trust staff will be protected to transfer on the same employment terms and conditions, including pensions. This is legally covered by the Transfer of Undertakings (Protection of Employment) Regulations; commonly known as TUPE. Further information on this will be shared at the appropriate time with staff. We are committed to ensuring that this contractual change happens smoothly with no disruption. Many Elements staff have already experienced TUPE when their schools became academies and joined Elements Trust.
13. Will school staff have to work across different locations?	There are no plans for this. Both trusts currently have portability in their contracts, although staff are appointed to work at a designated school. We would not direct school-based staff in Dudley to work in South Worcestershire or vice versa. However, for those that want this there will be more opportunities to work across the trust as part of wider collaboration.
14. Will the school names change?	No. All school names from both trusts will stay the same.
15. Will there be any changes to the Admissions criteria?	No. We will continue to work with the Diocese as we do currently and ensure the admissions policies reflect the needs of schools as they do now.
16. Will the curriculum change?	No. We currently all follow the National Curriculum and this will stay the same.
17. Would the term and holiday dates change?	No.

<p>18. How will governance work?</p>	<p>Currently each trust has its own Board of Directors. This would change and there would be one Trust Board for the newly merged trust. The newly formed Trust Board would be made up of skilled and experienced individuals and would comprise existing Directors from both trusts. As with now, each school will continue to retain its own local academy board (LAB/LSB), with responsibilities delegated from the Trust Board. There is no planned change to these arrangements and they are retained as part of the Diocese Articles of Association.</p>
<p>19. Are there any financial risks to either trust?</p>	<p>Both trusts are currently financially secure and have their own reserves, and the financial stability of both trusts is a key component carefully considered within the due diligence stage and throughout the considerations of both Boards. Due Diligence demonstrates a merge would strengthen the financial position of both trusts. Following a merger, the reserves of both trusts are 'pooled'. Budget setting and monitoring for schools will continue as normal. Both trusts are experiencing falling pupil numbers as part of a local and national fall in the birth rate and the merged trust will counter the impact of this by providing greater resilience.</p>

May 2026