

School leaders survey findings

Summer 2025

**Browne
Jacobson**

A photograph of a classroom. A male teacher in a maroon sweater and khaki pants stands at the front, pointing with a blue marker towards a large whiteboard. He is holding a blue folder. Several female students in dark blue school uniforms are seated at blue desks, looking towards the teacher. The room has large windows on the left side, and a projector is mounted on the ceiling. The overall atmosphere is professional and educational.

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Introduction

Welcome to this report on the findings from our Summer 2025 School Leaders Survey

Research for the survey, where we invited the leaders of the nation's schools and academies to share their views, was carried out during May 2025.

Nearly 200 leaders, representing 1,719 schools, completed the survey – responsible for nearly a million pupils from across all regions of England.

These results also reflect a balanced distribution of age groups with participants involved with institutions that cover a range of ages:

- 43% of participants representing infant, junior and primary.
- 37% secondary and sixth form.
- 7% nurseries.
- 6% specialist SEN provision.

Of those school and trust leaders responding:

- 26% are CEOs and Deputy CEOs.
- 13% are Trustees or Governors.
- 28% are Executive Headteachers, Headteachers, Deputy Headteachers and Assistant Heads.

Responses for the remaining 33% included central exec team members, business managers/partners, CFOs and Directors of HR, IT and Operations.

Of respondents working in the sector, 71% are in a multi-academy trust, 11% in standalone academies and 12% in maintained schools, with the remainder in local or regional educational roles.

As always, we're very grateful to all the school leaders who gave their time generously to participate.

Foreword

Optimistic neutrality turns to dissatisfaction in the government's first year

School leaders have been in waiting: for clarity and a clear sense of the government's education programme.

A new government brought quiet optimism for greater support with some of the systemic challenges facing education. In the government's first year in office, we have had draft legislation, announcements on funding, expansion of early years free provision and on SEND reform.

The clear sense from this summer's survey is that school leaders' views on the impact of government policy has shifted from neutrality to dissatisfaction. It is hard to pin down the reasons for the shift, but pace and clarity on the direction of travel may be key contributors.

Our survey has always reported concerns around funding but now, more than ever, the financial backdrop seems to permeate throughout.

Fewer than 1 in 5 school leaders expressed any confidence in their organisation's financial security over the next three years.

It is no surprise then, that financial stability has become the top operational priority for leaders who are now having to focus their time on unenviable decisions around reviewing staffing and other cuts – with other strategic priorities inevitably taking a back seat in the meantime.

It will have been disappointing to many that the education budget did not make the top five departmental spending increases in percentage terms in the recent Spending Review. There is a palpable sense that the pace and ambition of change must accelerate.

This time, we focus on two drill-down areas – early years school readiness in the wake of the Secretary of State making this a key investment area, and exclusions in the long shadow of the pandemic's impact.

Both will provide leaders with areas for reflection when considering priorities for the next academic year.



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Nick is an education lawyer, accredited executive coach and head of education. He is also a member of Browne Jacobson's board.

Trends emerging from this edition

Key themes

State of finances

Financial challenges are nothing new for the sector, but we have seen a marked increase in school leaders listing financial stability as their top priority.

This lack of confidence in financial security in the medium term is shifting leaders' focus to measures such as reviewing staffing requirements, cutting expenditure and mitigating potential financial risks.

Many of the Spending Review promises were already allocated for teacher pay awards and extending free school meals and confirmation that a slice of this pot will also be allocated towards SEND system reform only further adds to this burden.

Early years

Leaders are clear that school readiness has deteriorated since before the pandemic.

The Department for Education (DfE) has put significant investment into this area, but leaders have mixed views on the impact this will have on the most disadvantaged families in their communities.

School leaders are responding to the DfE's call to extend early years provision via enhanced funding, with significant numbers considering setting up schools-based nurseries.

It will now be interesting to see how those intentions translate into action on the ground in view of the challenges felt around affordability of staffing and complexities of delivery.

Exclusions

Exclusions and suspensions are near an all-time high, but this reflects underlying issues. Principal among those issues are SEND and the challenges that schools face in striking a balance between inclusion and disadvantages posed to other students due to a minority exhibiting poor behaviour. The survey clearly highlights that behaviour has got worse since the pandemic.

We frequently hear how there can be a perception – or, in some areas, explicit advice – that permanently excluding a pupil will open access to further support or a timelier consideration of other options.

This reactive approach doesn't feel like a sustainable one. Developing a more proactive system characterised by early intervention would be in the best interests of pupils at risk of suspension or exclusion.

Key findings

53%

Half of school leaders are dissatisfied with the impact of government education policy on their organisation.

85%

Judge the financial prospects of their organisation negatively, up from 40% last autumn.

48%

Almost half of respondents are dissatisfied with government policy on academisation.

48%

Almost half expressed dissatisfaction with government policy regarding place planning.

91%

9 in 10 leaders continue to be dissatisfied with the state of SEND funding.

65%

Financial stability is a top 3 priority for 65% of school leaders.

87%

Almost 9 out of 10 of school leaders are reviewing staffing requirements.

45%

Nearly half have had an increase in suspensions and exclusions in their schools over the last 12 months.

79%

More than two thirds report pupil behaviour has become significantly worse since the pandemic.

74%

Nearly three-quarters feel that school readiness has worsened since the pandemic.

55%

The majority lack confidence in the £4.4bn early years funding, doubting it will have the desired impact for disadvantaged families.

39%

4 in 10 are considering opening a school-based nursery in response to the government funding pledge.

1. The policy landscape



1. The policy landscape

1.1 The government's first year

If the government was hoping for a positive review of its first year in office, it will be disappointed with these results.

Over half (53%) of school leaders are dissatisfied with the impact of government education policy on their organisation – versus a 9% satisfaction rating.

The marked increase in concerns about the state of finances cannot be heard loudly enough from this survey.

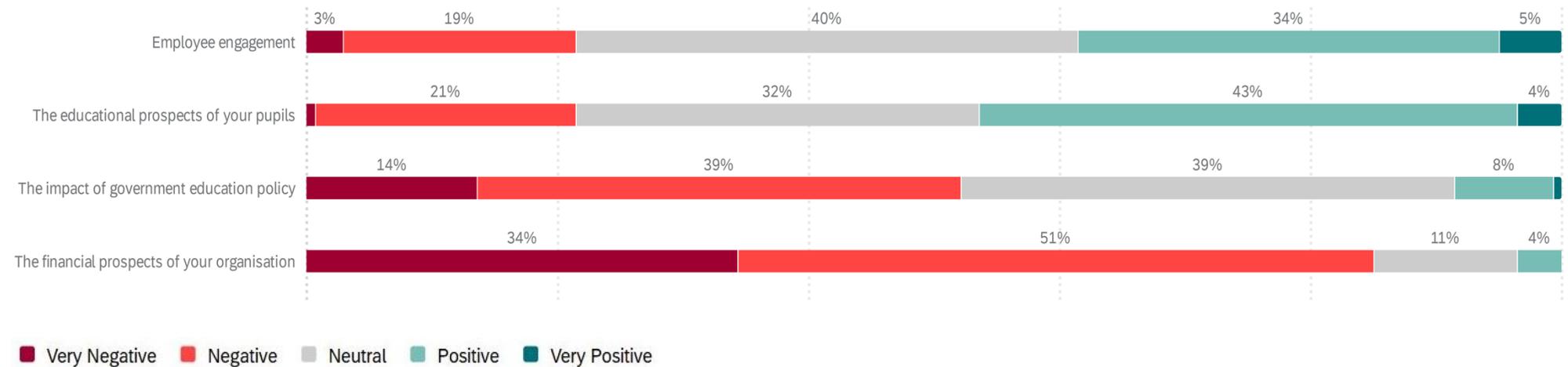
85% of respondents judge the financial prospects of their organisation negatively – only 40% said the same six months ago.

As you would expect, this correlates with a marked increase in financial stability being a top priority.

When it comes to employee engagement, views have become more polarised.

The recent pay award may contribute to some of the previous neutrality tipping into positivity, but with more than 1 in 5 reporting negative employee engagement, we expect this to rise as the realities around funding start to materialise into staffing cuts in schools.

In light of the election results bringing in a new government, how do you judge the following for your organisation?



“Half of leaders said they were dissatisfied with government policy on academisation. There could be a number of drivers for this sentiment but it's likely that the Wellbeing and Schools Bill is a key driver. This is because the second part, focusing on the school system, has come under heavy criticism for its impact on academy freedoms with the bill looking to bring academies in line with maintained schools in some areas where they previously had freedom.

“Some of the early messaging on the bill may have also created divisions, for example, the initial proposal of a pay ceiling which was rolled back, but it seems clear there are still strong and mixed views in the sector as to the impact on academies.

“There is perhaps an underlying tension playing out after 15 years of an expanded academy system over where the line should be drawn in terms of the level of regulation from government and the freedom of individual schools and trusts to set curriculum and pay amongst other levers for performance.”

Charlotte Antoniou, Partner



1. The policy landscape

1.2 Government policy

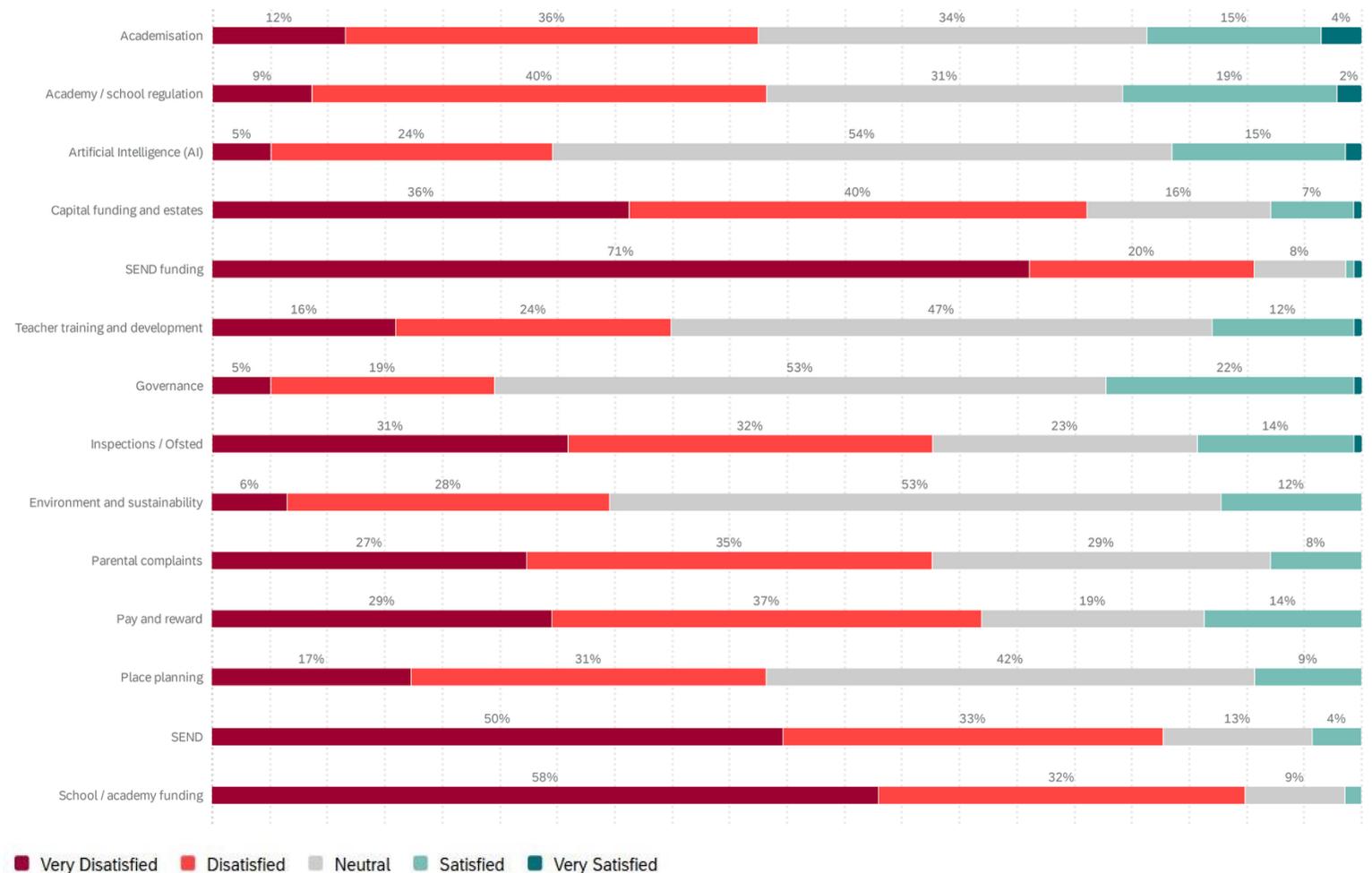
With almost half (48%) expressing dissatisfaction regarding government policy on academisation, this should give policymakers food for thought on the current policy agenda.

Concerns around falling pupil numbers is illustrated in frustration with government policy regarding place planning, with almost half (48%) expressing dissatisfaction.

The proposed introduction of the School Support Staff Negotiating Board (**SSSNB**) has done nothing to improve response to government policy in respect of pay and reward, where two-thirds of respondents (66%) now view this negatively, a significant jump from 40% in the autumn. The impact of NI contributions and the funding approach to the teachers' pay award are likely to be major contributors here.

The theme of financial instability continues across the board, nowhere more so than in relation to SEND funding. Last autumn, we discussed whether the commitment to a £1bn uplift in SEND funding would improve leaders' views and we can now see the dial has not shifted – with 9 in 10 leaders remaining dissatisfied with the state of SEND funding.

How satisfied are you with government policy?



“There has been a significant increase in dissatisfaction among school leaders with regards to government policy on pay and reward since the autumn, with two-thirds of school leaders feeling dissatisfied.

“This is understandable given the shift from a fully-funded pay award in the 2024-2025 financial year, to only ‘most’ of the costs of the pay award being covered by the government in the 2025-2026 financial year.

“Schools are having to contribute approximately 1% of the pay award themselves through ‘improved productivity and smarter spending’, with the government commenting that schools must ‘play their part’ in finding the unbudgeted additional funds for the 2025-2026 pay award.

“This appears to show a lack of appreciation of the difficult financial circumstances under which schools are operating. We expect industrial action to be back on the horizon when the inevitable difficult decisions around affordability of staffing structures need to be made in the form of redundancy proposals over the forthcoming academic year.”

Alicia Pimblett, Principal Associate



2. Priorities and organisational resilience

A photograph showing the lower legs and feet of several children in school uniforms (grey skirts, white socks, black shoes) and an adult in a red shirt and grey trousers. They are standing on a rope bridge made of green ropes and wooden logs, set outdoors on a grassy area. The background is slightly blurred, showing a building and a blue structure.

2. Priorities and organisational resilience

2.1 Operational priorities

We asked leaders to give their top three priorities from a range of options – and the answers indicated a real shift.

While financial stability has consistently been reported as high up the agenda, it is now clearly the leading operational concern for leaders, up from 49% last autumn to 65% now.

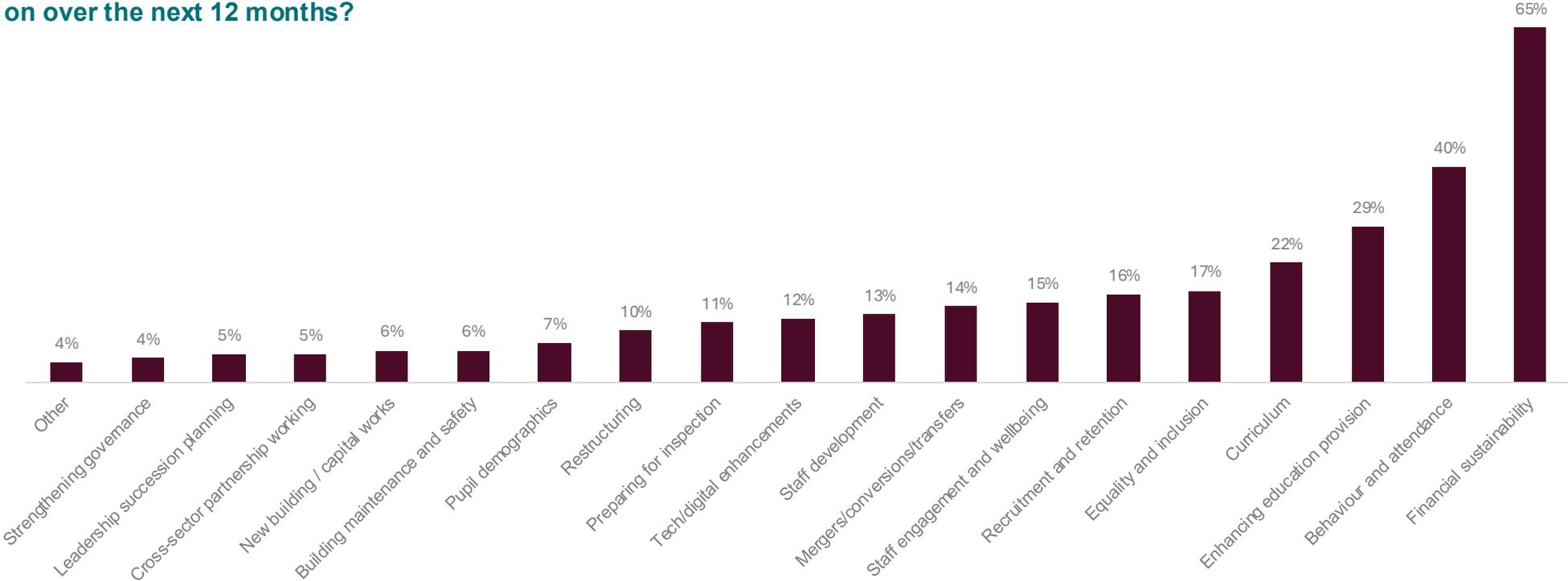
One leader commented: **“Times have never been more financially challenging than now”**.

Areas of strong priority previously – recruitment and retention, as well as staff engagement and wellbeing – have decreased in response to the focus on financial pressures.

Behaviour and attendance remains a high priority, coming a close second with 40% regarding it as a top three operational strategy.

Our dedicated section on exclusions (P21) explores how the increase in suspensions and exclusions follow a significant deterioration in pupil behaviour.

What are the top three organisational strategies that your organisation will focus on over the next 12 months?



2. Priorities and organisational resilience

2.2 Financial resilience

Concerns over the financial state of the sector are heard loud and clear when asked about the current and expected state of finances.

Four in 10 describe current finances as poor, although 46% say it is manageable.

However, the picture worsens when looking ahead. Two-thirds (64%) lack confidence regarding future financial prospects, with only 18% reporting any confidence in financial security over the next three years.

The recent government Spending Review featured an increase in the core schools budget from £64.8bn this year to £69.5bn in 2028, a cash-terms increase of £4.7bn.

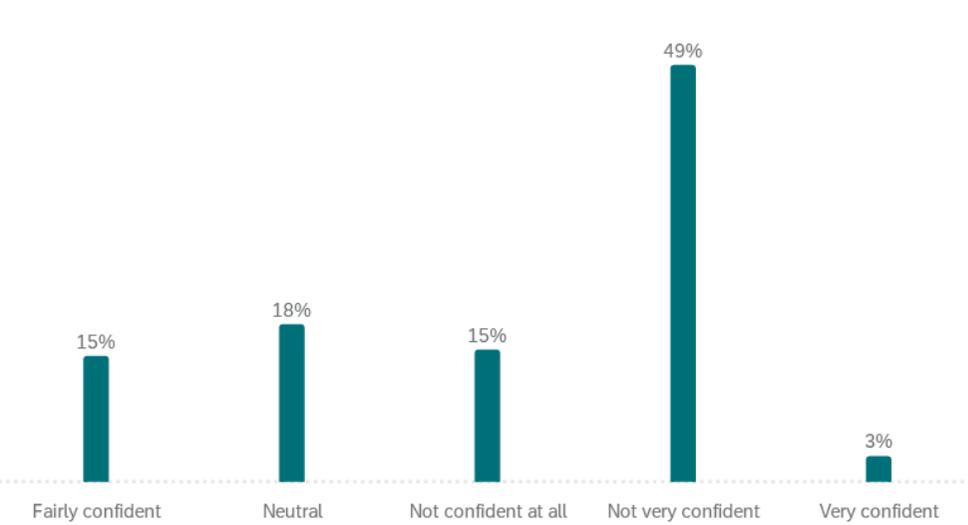
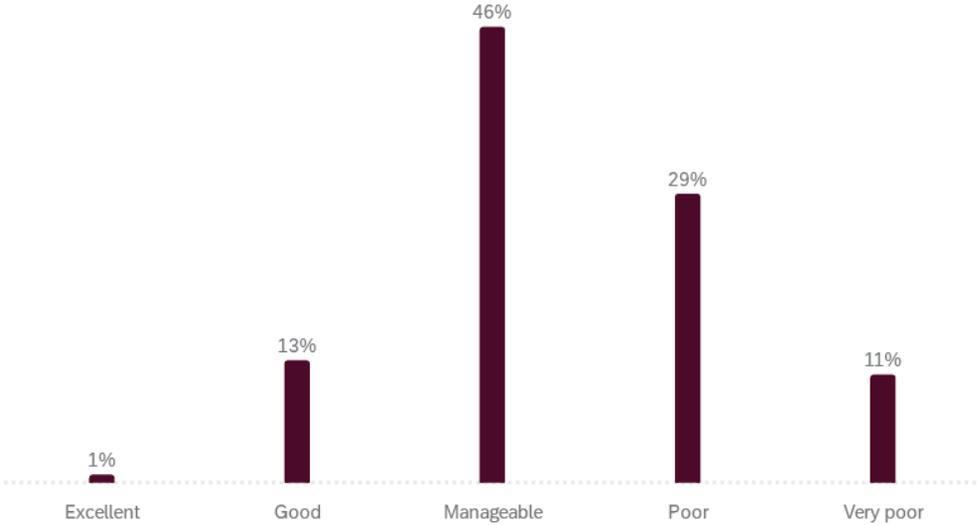
A 0.4% per annum increase, however, is exceptionally tight and education didn't make the top five departmental spending increases in percentage terms.

This is particularly significant when we consider existing and growing financial pressures in areas such as SEND provision and buildings maintenance.

While the state of public finances means it is unlikely there will be a major intervention from government to strengthen school finances, schools and trusts are likely to have to take the lead themselves.

How would you describe your organisation's current financial situation?

How confident do you feel about your organisation's financial security over the next three years?



2. Priorities and organisational resilience

2.3 Financial sustainability

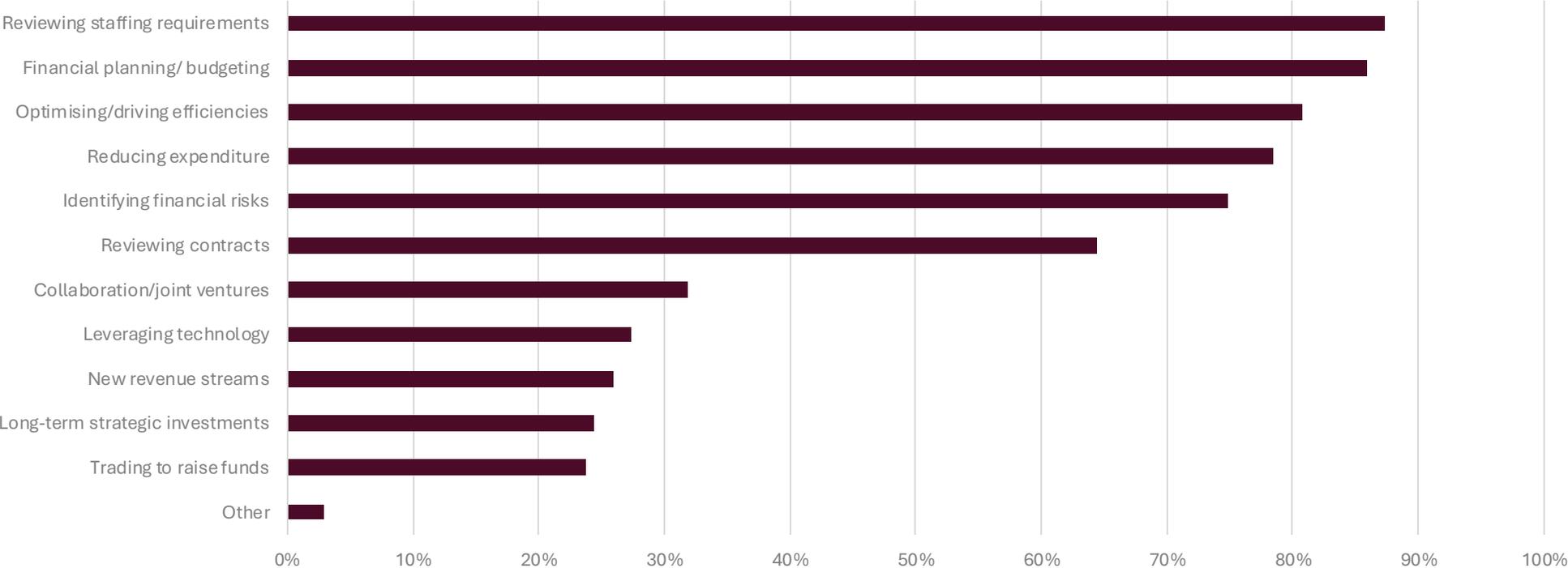
Leaders are taking proactive steps to improve their financial prospects, with many measures being considered. Almost 9 in 10 (87%) are reviewing staffing requirements.

It's a very difficult situation in which restructures and redundancies feel an inevitable outcome of the financial situation.

But as illustrated at the beginning of this section, leaders are struggling to prioritise maintaining staff engagement and wellbeing to the same extent as they have previously – at a time when it's perhaps more important than ever.

We will keep a close eye on which measures increase in our next survey and whether leaders start to look more closely at whether they can leverage technology such as AI, or capitalise resources and trade, to improve their financial prospects.

What measures are you taking to improve your organisation's financial sustainability?



“Our survey paints a difficult picture for staff. Concerns around funding are at a high point and with only 1 in 5 reporting any confidence in their financial prospects over the next three years, it’s no surprise to see as many as 87% reviewing their staffing requirements.

“The sector is bracing itself for the impact of this, where redundancies and associated industrial action seem inevitable.

“While staff engagement and wellbeing previously featured as a top three priority for leaders, this is now only the case for 15%. Finding space to ensure the policy landscape doesn’t eat away at hard-fought shifts in culture and wellbeing will be a key challenge for leaders in this financial climate.”

Heather Mitchell, Partner



3. Early years



3. Early years

3.1 Impact of investment

When asked about the level of school readiness now compared to pre-pandemic levels, 3 out of 4 leaders (74%) felt it was worse, with 34% reporting it was significantly worse.

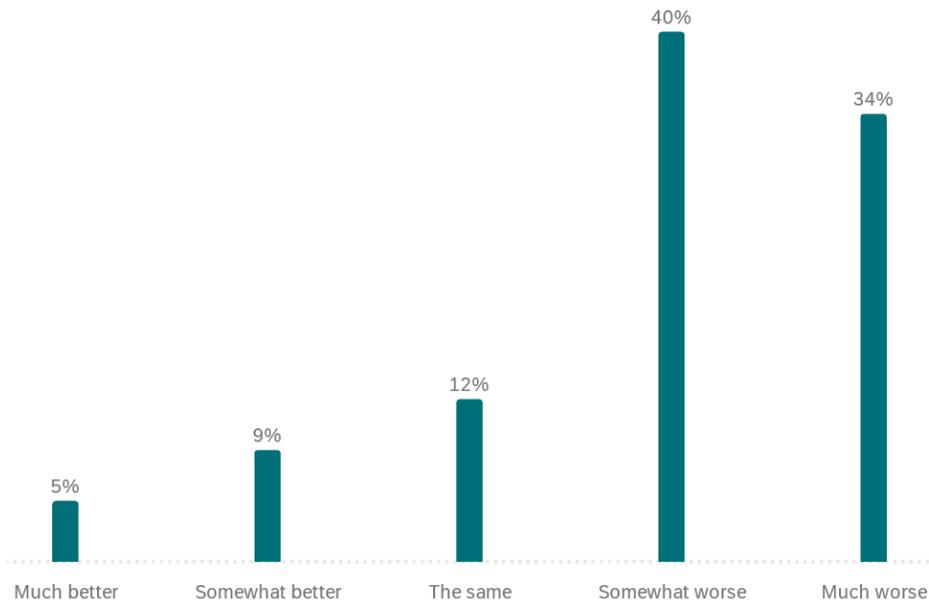
In this context, the Secretary of State has made early years a priority with significant investment. Leaders have mixed views on whether this will have the desired impact on disadvantaged families in the communities they serve, with over half (55%) having no confidence there will be an impact.

Similarly, while 28% felt the expanded free nursery entitlement would positively affect children's readiness for school, 7 out of 10 were neutral.

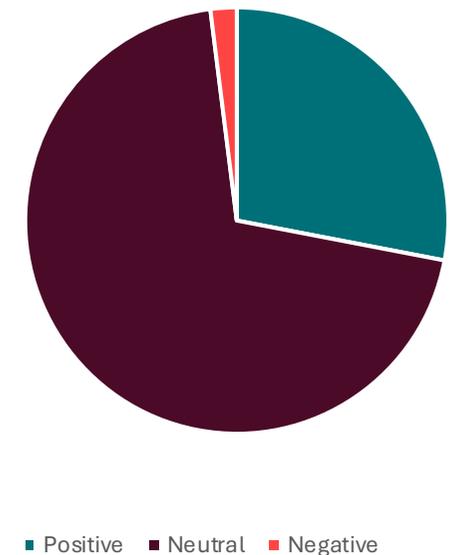
How confident are you that the expanded early years entitlements will adequately address the needs of disadvantaged families in your area?



How would you rate the level of school readiness now compared to before the Covid-19 pandemic?



How do you anticipate the expanded free entitlement will affect children's readiness for school?



3. Early years

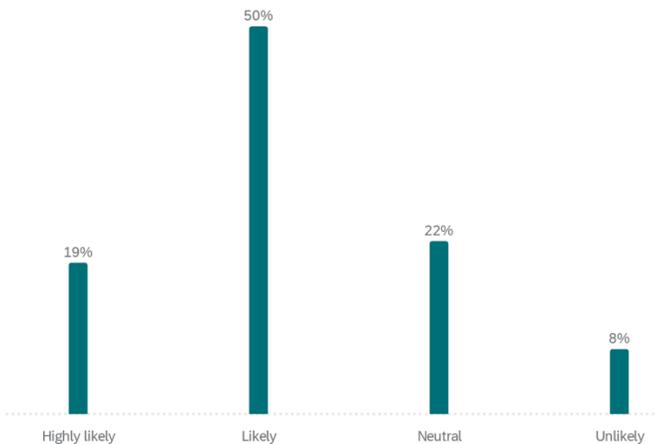
3.2 School-based nurseries

Leaders overwhelmingly agree that early years provision within a school nursery improves outcomes, with only 7% disagreeing versus 66% agreeing and the rest neutral.

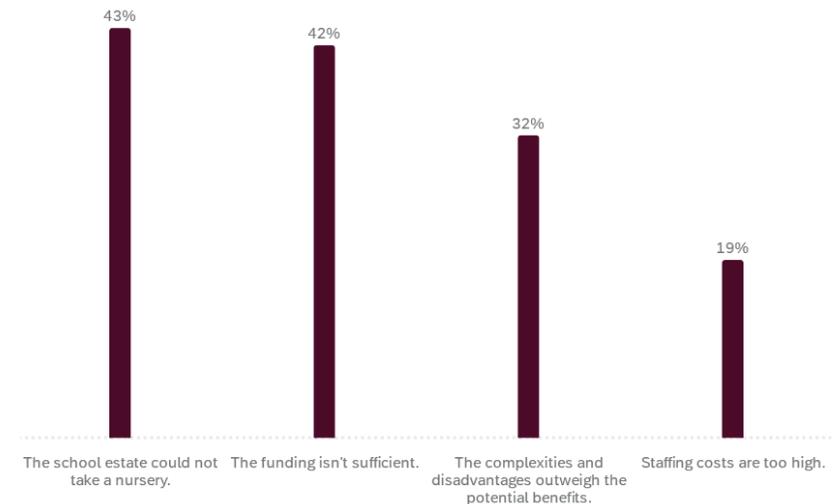
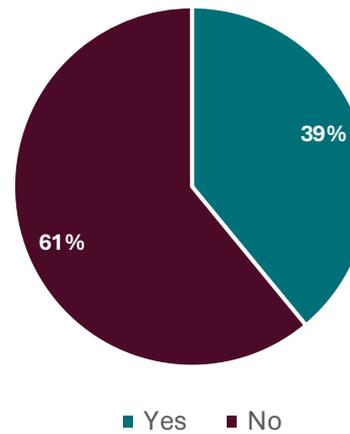
In this context, it's interesting to note that 4 out of 10 (39%) respondents are considering opening a school-based nursery in response to the government's funding.

However, it's expected to be a difficult path. Of those considering a nursery, almost 7 in 10 (69%) foresee challenges in recruiting and retaining staff. Almost 20% of those who aren't considering a nursery said this is because staffing costs are too high with 42% stating it is because the funding isn't sufficient.

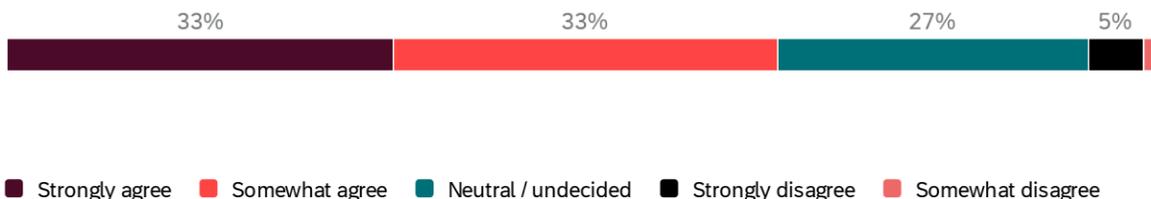
Do you foresee challenges in recruiting and retaining staff to meet the increased demand for early years provision?



Are you considering opening a school-based nursery and applying for government capital funding? (And if not, why not?)



Do school-based nurseries improve outcomes for children entering reception, compared to non-school based nurseries?



“The government’s commitment to breaking down barriers to opportunity by providing children with the best start in life is welcomed. School readiness has deteriorated since Covid-19, so this is the time to invest in our youngest learners.

“The survey illustrates leaders’ confidence that school-based nursery provide the best early years outcomes. These settings support children’s ability to self-regulate and take care of themselves, such as using the toilet.

“There’s less assurance, however, about schools’ ability to meet the challenge of recruiting and training staff. Skilled practitioners who provide a well-sequenced learning journey are vital to the success of the mission.

“Finally, what is important to remember is that although the expanded provision will benefit working families, it makes no difference to children from disadvantaged backgrounds, for whom the offer remains the same. More needs to be done to make sure these children have the best start in life too.”

Cathy Paine CBE, CEO REAch2 Academy Trust



4. Exclusions



4. Exclusions

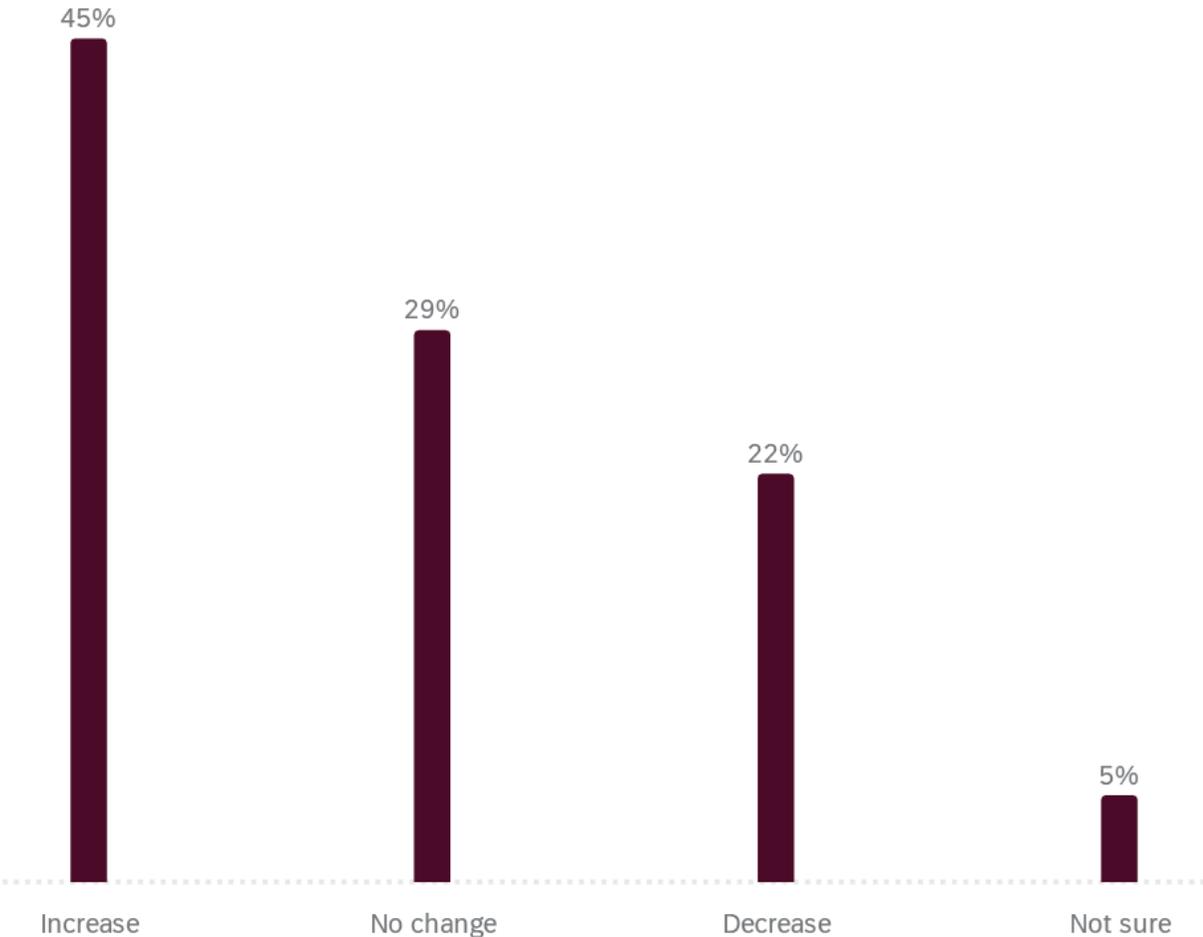
4.1 Trends in suspensions and exclusions

45% of school leaders said there had been an increase in suspensions and exclusions in their schools over the past 12 months, with only 22% noting a decrease. This level of increase is reflected in the national statistics on exclusions and suspensions.

This finding also sits alongside 46% of respondents saying behaviour has got somewhat worse, with 33% saying it had become significantly worse since the pandemic.

Only 4% of respondents said it had improved. There has been much sector discussion about the extent to which behaviour has deteriorated and what the root causes of this are. Our survey shows that 79% school leaders do view behaviour as having worsened, rather than this being due to a change in expectations.

Have you noticed any trends in the number of suspensions and exclusions in your school(s) over the past 12 months?



“There needs to be a much greater understanding that zero suspensions and exclusions is not a laudable target.

“Schools with zero are, in many cases, not bastions of inclusion and accommodation – they are sometimes sacrificing the needs of the many in the classroom in favour of the disruptive one or two.

“A high level of suspensions and exclusions is clearly a cause for concern, but a low level might actually be a sign of a school managing its behaviour issues across the board in a healthy, effective manner.”

School governor in the South-East of England.



4. Exclusions

4.2 Challenges and alternatives

The largest challenge highlighted was balancing behaviour management with inclusion, with 38% rating this as the greatest obstacle.

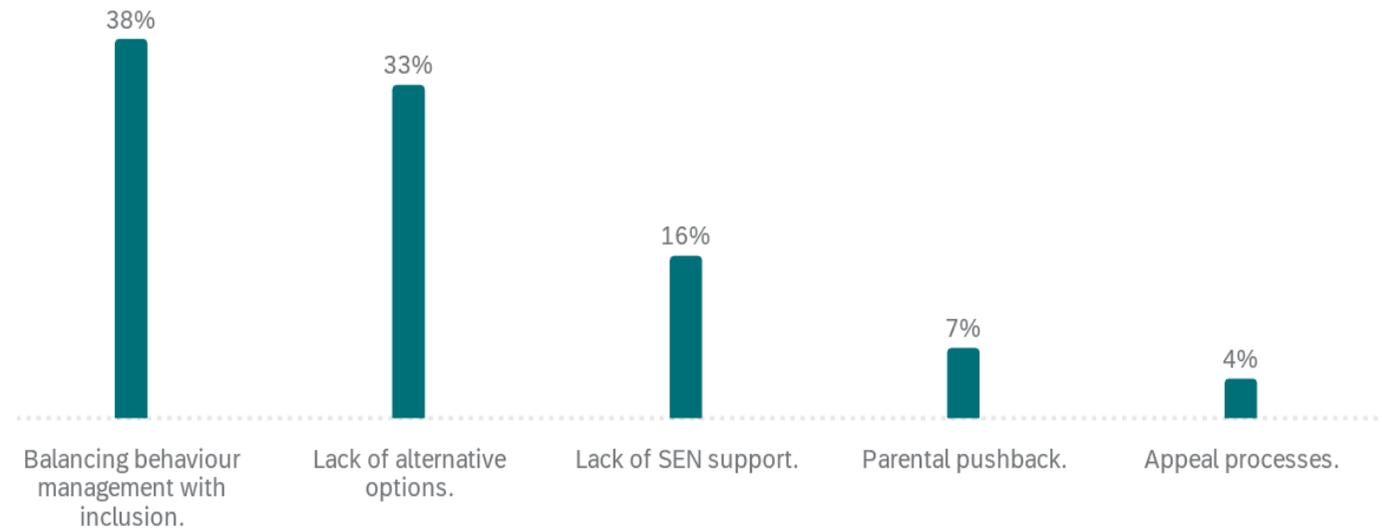
Given the broader sector pressures relating to SEND, it's unsurprising that a lack of SEND support was highlighted as a key challenge.

Schools will be eager to learn what the government's approach to SEND, and inclusion will be when it publishes a white paper later this year.

When school leaders are exploring the possibility of permanently excluding a pupil, alternative options are of critical importance given the requirement for it to be a last resort.

The lack of alternatives was highlighted as one of the biggest challenges school leaders face when managing suspensions and exclusions, with 33% saying this was their biggest challenge.

What is the biggest challenge your school(s) face when managing suspensions and exclusions?



“There aren’t enough alternative options available and many of those that are available are of questionable quality.

“Many don't give pupils a route to employability.”

CEO of an inner-city London MAT.

Another issue identified in the survey was the difficulty in getting timely support, including the use of cost-effective, high-quality alternative provision, to avoid the need to permanently exclude pupils.

We hear frequently how there can be a perception – or, in some areas, explicit advice – that permanently excluding a pupil will open access to further support or a timelier consideration of other options.

From the child's perspective, this is not a great approach to help them get the support required and needs to change. There must be a clearer steer from government and drive to establish such provision.

A number of respondents said they were considering setting up their own alternative provision for this reason, a move that should be encouraged.



4. Exclusions

4.3 Alternative provision

On our question about alternative provision, only 19% said this usually or often supported pupils' educational outcomes with 27% saying this was rarely or never the case.

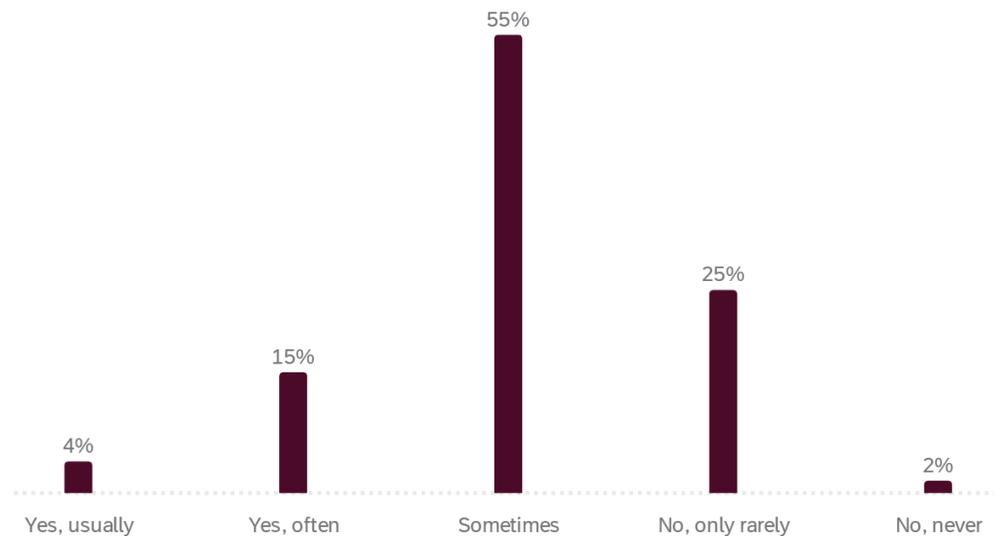
The majority therefore said this was only sometimes effective at 55%. This was highlighted in the commentary by respondents, who signposted a lack of availability of affordable and high-quality options for alternative provision.

When looking at alternatives to permanent exclusion, nearly all (96%) respondents said they used pastoral support in their schools, and many (71%) also used restorative justice in some form.

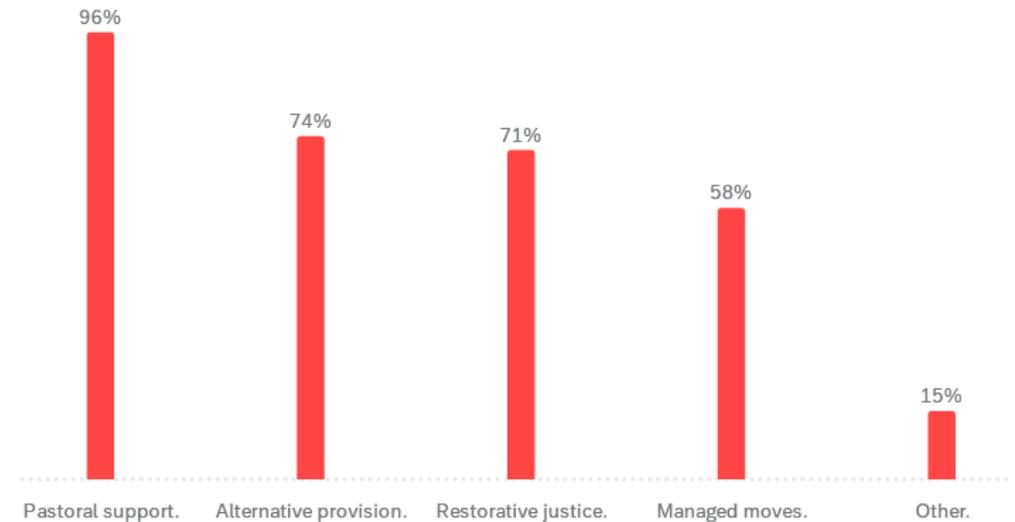
Three-quarters (74%) said alternative provision was used but this fell to 58% for managed moves, the other main external alternative to permanent exclusion.

This perhaps reflects the varied arrangements in different local authorities and the variability of how well those work to provide a genuine fresh start for pupils in a timely way.

Do you believe alternative provision for excluded students effectively supports educational outcomes?



What alternative interventions does your school use before resorting to suspension or exclusion?



“Exclusions and suspension are near an all-time high, but this is a reflection of underlying issues.

“Principal among them, as highlighted in the survey, is SEND and the balance for schools fundamentally between inclusion and the disadvantages posed to other students by a minority of poor behaviour.

“That behaviour has gotten worse since the pandemic is clearly highlighted by the survey.”

Philip Wood, Principal Associate



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We champion fairness, make the complex simple and forge connections between clients to find creative solutions.

This is how our lawyers improve outcomes for every person, community, education institution and business we serve.

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Browne Jacobson's education practice is well-established and highly regarded. As one of the country's leading law firms operating in the sector, our multidisciplinary practice delivers a comprehensive portfolio of legal and HR services, from our office network to education sector organisations nationally.

The team is ambitious and forward-thinking. We seek to combine our legal expertise and deep sector understanding to provide advice that enables our clients to navigate the evolving education landscape.

The team is ranked Tier 1 in both Legal 500 and Chambers and Partners UK.

Media enquiries

If you'd like to feature any of the findings from this report or explore any of these themes in more detail, please get in touch.



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Turning insight into exceptional value, supporting schools to thrive

Award-winning team

Top 3

Best Law Firms for Education 2025, The Times.

7x winner

Legal provider to educational institutions,
EducationInvestor Awards.

Top tier law firm

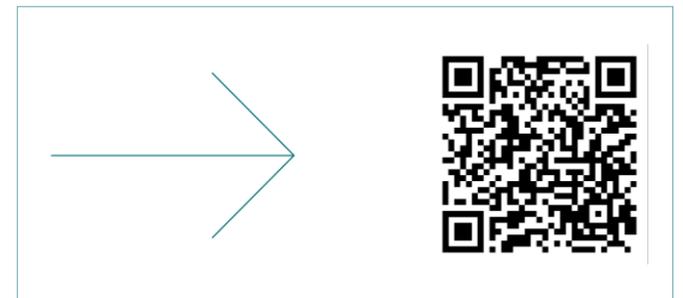
Ranked band one nationally by Chambers and Partners
and a Legal 500 top tier law firm.

Top employer

Leading employer in the Social Mobility Index 2024.

Next steps

Let us know if there are any topics you'd like us to explore in the next edition and please do take the opportunity to share your views for future editions of the school leaders survey. [Register here](#) to be among the first to hear about future surveys or scan the QR code:



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