

Summary of the Review of Winchester Cathedral:

In June 2024, under the provisions of the Cathedrals' Measure 2021, I commissioned a Review of Winchester Cathedral, in response to the departure of Dr Andy Lumsden and the later resignation of the Senior Non-Executive Member of Chapter. I appointed Patti Russell of Winckworth-Sherwood to conduct the review. It soon became apparent that the scale of the task warranted additional support, and Jane Hedges joined Patti, bringing her considerable experience in Cathedral leadership as a former Dean of Norwich and Interim Dean of Canterbury. I am very grateful to Patti and Jane for the way in which they have conducted this Review, which is thorough and searching yet pastorally sensitive. It is my hope and prayer that these findings will enable Winchester Cathedral to move forward into a positive and hopeful future.

From the outset, it is important to recognise that this is not a report about a failing cathedral. Far from it. Throughout their investigations, Patti and Jane have consistently emphasised that there is much to celebrate at Winchester Cathedral. Among clergy, musicians, chapter, staff and volunteers, there are people of calibre who bring their skills, knowledge and expertise, as well as a passion and commitment to the life and ministry of this great cathedral church. I am convinced therefore that initiating a Visitation would not have been appropriate and commissioning a Review was the right approach given the powers available to me.

Nevertheless, the announcement of the Director of Music's departure in April 2024 precipitated a chain of events which has revealed some significant failures, most significantly in leadership, management and communications. The consequences of these failures have been considerable. The Review has helpfully outlined the series of events that took place; what went wrong; and where responsibilities lie.

It is vital to stress that, whilst there are particular responsibilities of leadership, no one person is entirely to blame in these circumstances, and all parties involved, both directly and indirectly, can and should learn lessons. The purpose of this Report is not to attribute blame, but to enable that to happen.

Perhaps one of the most painful aspects of reading the entire Review lies in the way it highlights the fact that actions that were not taken maliciously or with ill intent, can, nonetheless, have seriously detrimental consequences. The responsibilities inherent in leadership of all kinds and at every level are evident when we see the consequences of such failings. The events that unfolded demonstrate the potential for harm where proper processes either are not in place, or are not properly followed and understood.

Despite the many positive points identified by the Reviewers, it should not come as a surprise that the combination of declining performance, unsatisfactory relationships and failings in leadership and management has resulted in the departure of some senior leaders from the Cathedral. It is my sincere hope that this review will be the base from which new appointments can be confidently progressed and the Cathedral can move on.

Everyone who provided evidence to this Review, either face to face or in writing, did so on the understanding that the report itself would not be a public document, as the Church Commissioners' draft statutory guidance for such reviews stipulates. This has enabled people to be candid with the reviewers and has led to a Report which is detailed and frank in its findings. In my own summary I seek to respect that confidentiality¹ while providing sufficient detail to those responsible for implementing recommendations. I hope that all those who care passionately about Winchester Cathedral will have confidence in the rigour of this process.

This summary of the Review's findings will:

- Record the majority of the Review Team's introduction to their report, since this provides an extremely helpful summary of the wider situation as they perceived it
- Set out the terms of the Review
- Identify good practice within the Cathedral
- Explain, to the extent that it is possible while respecting necessary confidentiality, the reasons behind the crisis precipitated by the announcement of the Director of Music's departure
- Summarise recommendations going forward

I stress again that this Review has been undertaken by me using the powers given to me in ecclesiastical law. However, the responsibility for implementing its recommendations lie wholly with the Dean and Chapter, in recognition of their own statutory responsibilities, not least as Charity Trustees. For that reason, I will not be commenting further on the work of the Review or entering into correspondence about it. Rather I commend Winchester Cathedral to the goodwill and prayers all those who value it and love it.

Rt. Rev. Philip Mounstephen
Bishop of Winchester
March 2025

¹ Note too that this summary has not been through an inevitably lengthy process of Maxwellisation thus necessitating the avoidance of any individual being named.

Extracts from the Introduction to the Review Team's Report:

This Review, commissioned by the Bishop of Winchester in August 2024, follows the departure of the Director of Music, Dr Andrew Lumsden, in July after more than 20 years in post. Dr Lumsden was much loved and highly regarded both in the Cathedral community and nationally among cathedral musicians. His departure prompted intense speculation from the Cathedral community and a public outrage on Dr Lumsden's behalf.

In commissioning the Review, the Bishop said: "Whilst the review will of course focus on areas which have been the subject of public concern, it is important to stress that its aim is primarily pastoral. The recommendations will, I trust, enable Winchester Cathedral to move to a more settled future in which it continues to offer worship to God of the highest quality, and to act as a sign of his welcome and love to all who enter into it. After a very difficult and painful period I would ask all those concerned to approach the work of the review with grace and trust so that together we can play our part in ensuring the Cathedral enters into that positive and fruitful future".

Arriving in Winchester in September, we found the staff with whom we interacted to be welcoming, friendly and helpful; we observed a Cathedral which is well maintained and cared for and where there is clearly much positive interaction with worshippers, visitors and the public, through the activities and events on offer and through the daily round of prayer.

However, as interviewing began, we immediately encountered stress and, in some cases, extreme pain at what had happened to the institution, to themselves and to other individuals caught up in the fall-out.

It will become clear in this report that mistakes have been made by the leadership team at the Cathedral; some through misunderstandings, some through poor judgement or the receiving of inadequate advice, some due to the organisational culture of the Cathedral, and some simply due to individual personalities. As time has gone on, more of these mistakes were made as a result of the media hate campaign.

It is our view though that, contrary to accusations made by some of those corresponding with us, we do not believe that the leadership team has been deliberately dishonest or uncaring.

Dr Lumsden has been publicly silent about the reasons for his departure, and we have heard during the course of this Review that the Cathedral has not communicated the reasons for it consistently. Concern for Dr Lumsden has been compounded and exacerbated by further dissatisfactions with Cathedral management and communications relating to the Cathedral music department, in particular by former Cathedral lay clerks and parents of choristers. Several

national press articles and multiple comments made on social media have been deeply hurtful and destructive.

We have been made aware of particularly bad behaviour; some between members of staff, some by the media, some by members of the Cathedral congregation and some by people who in their passion for Cathedral music have mis-directed their energies in a such a way that paradoxically they have caused further damage to the institution which they love.

Despite all this it is our strongly held belief that things can be turned round at the Cathedral. There are many good people associated with its life and a large number with whom we spoke voiced their hopes for what will come out of this Review and for the future flourishing of the Cathedral.

We began all our interviews by asking people how they were and what they hoped for coming out of the Review. These are some of the hopes people voiced:

- *We want some sort of formal apology*
- *For the Cathedral to be trusted*
- *Good, easy and fruitful relationships*
- *Lots of honesty, learning and understanding*
- *That plans are taken on board and implemented*
- *To become an organisation which learns from its mistakes*
- *To say we are sorry and that this is what we are learning*
- *We want to build bridges.*

We witnessed signs of hope ourselves, for example, the Interim Director of Music is already making an impact at the Cathedral and relationships within the department and with Chapter have improved. The Vergers' team is well led and there is excellent co-operation between the Head Verger and those responsible for leading liturgy. The administrative staff work well together and there was very positive feedback about working at the Cathedral in the recent staff survey, people saying that this is a good place to work. We also observed a positive culture around safeguarding, communicated well on the website.

In addition to the Dean and Canons, the Chapter has some very skilled and experienced non-executive members. The Chapter has recently commissioned a Governance and Culture Review and indications are that this work is going well and that some of the recommendations coming out of our Review will already be implemented or well under way. We therefore believe there is every reason to have hope for the future and that what has gone wrong in the past can be put right.

We hope that our findings and our recommendations will provide a sound basis for Winchester Cathedral to build on its strengths and improve its practice in some key areas so that it can better fulfil its mission as a cathedral and centre of musical excellence and diversity.

Terms of the Review

The terms of reference, as agreed after consultation with the Chapter, were to conduct a review and make recommendations to the Bishop concerning:

1. The **leadership and management** of the Cathedral's choirs to include consideration of recent HR decision making and communications;
2. The **culture and behaviours** of the Chapter and Cathedral and the extent to which this affects Cathedral operations, specifically in relation to the Cathedral's choirs;
3. Cathedral **decision making processes** and, in particular, the processes by which the Chapter **manages risk and critical issues**;
4. **Governance** structures and the efficacy of **leadership** at Chapter level.

The Review team consisted of two reviewers with experience of working in and reviewing church and cathedral settings, and with expertise in governance, human resources, leadership, and culture setting. In addition, specialist musical input was sought from a Director of Music, a Trustee of the Cathedral Music Trust and a former Precentor from a large Cathedral. The team also conducted a survey amongst Deans about the arrangements for managing their music departments. In addition, they used the following benchmarks of good practice:

- a. The Cathedral Governance Code issued by the Association of English Cathedrals in respect of good governance. This is adapted from the Charity Commission's Charity Governance Code and reflects the standards and practices expected of cathedral chapters and committees.
- b. The Church of England Safeguarding Practice Guidance "Responding well to victims and survivors of abuse" (updated November 2021) in respect of healthy cultures, also drawing on the Senior Leadership training pathway set out in the Church of England Learning and Development Framework focussing on culture and 'radical candor®'.
- c. ACAS codes of practice and guidance on grievance, bullying and whistleblowing investigations.

Lists of key interviewees were drawn up with assistance from the Senior Executive Team of the Cathedral to include current and previous members of the Chapter and the music department, the Cathedral's clerical leaders, the Cathedral's communications advisor and HR advisor and parents of choristers.

Written submissions were invited from the Cathedral community to the Review group's dedicated email address. All submissions were reviewed, many were followed up with in-person interviews or requests for further information or clarifications.

The Senior Executive Team was requested to upload relevant documentation to a dedicated and secure Teams channel for the reviewers' consideration and review.

Further documentation was requested and uploaded during the course of the Review as new issues emerged.

The reviewers interviewed participants either singly or occasionally in small groups. Most interviews took place in person in Winchester and some via Zoom. Both reviewers attended all interviews. Contemporaneous notes were taken and typed up by one of them, with input from the second.

A review framework was created, covering the areas within the terms of reference. The findings were set against what would be looked for in a department and Cathedral which is being well managed and where healthy relationships are being nurtured.

The reviewers met regularly, usually on Zoom, but occasionally in person, for full discussion and, in the later stages of the work, to begin to agree and write up key findings and recommendations.

By the end of the Review the reviewers had:

- Interviewed 47 members of the Cathedral community, the majority of interviews taking place in person in Winchester
- Met with or interviewed 5 people more than once
- Received and reviewed over 140 written or digitally recorded submissions
- Reviewed written documents including Chapter minutes, handbooks, role descriptions, risk registers, email correspondence, HR documentation, strategy and policy documents

Good Practice within Winchester Cathedral

Throughout their report, the Review Team has emphasised a great deal that is to be commended in the life and ministry of Winchester Cathedral.

Chapter is praised in particular for setting up a Governance and Accountability Working Group under the chairmanship of one of the Non-Executive Directors, Chris Roles, which has already done some excellent work. An experienced communications consultant was commissioned to write a report on Communications at Winchester Cathedral, and these findings are also contributing to important improvements.

The Review Team enjoyed their time at Winchester and found people willing to engage, and keen to make things better: people with passion for the life and worship of the cathedral. They recognised particular gifts and skills in numerous individuals, including those on Chapter, amongst its musicians, and others with significant leadership roles within the Cathedral. They praised the Dean for many aspects of her leadership both pastorally and in leadership of a major centre of worship and culture. Indeed it is widely accepted that prior to the events that precipitated the current crisis, the Cathedral was being very well led.

The recommendations below for improvement should be read in this very positive light.

Reasons for the Crisis

The announcement of the Director of Music's departure at the end of April 2024 precipitated a crisis within Winchester Cathedral. The Review Team's report makes it clear that, with the benefit of hindsight, and full knowledge of the circumstances surrounding this announcement, much of the fallout was to a large extent predictable. This is because of a prior series of management failings as well as communication failings before, during and after the announcement. The situation was made significantly worse by the responses of various groups to what was unfolding.

Prior to April 2024 there were a series of contributory factors which cannot be described in detail because of the need for confidentiality in personal and HR matters. Nevertheless, we can say that these amounted to:

- A failure to appropriately manage people, including the management of poor performance, unacceptable behaviour and contractual changes. Some challenging behaviour led to dysfunction in the Senior Executive Team
- A failure to share information appropriately. This includes who needed to be aware of various allegations and investigations, and what information should be included and considered in an investigation
- A culture of secrecy, due to a misunderstanding of appropriate confidentiality and the aversion of key individuals to conflict
- Failures in communication. These were wide-ranging and included the failure to consult on and share the music strategy with key stakeholders, including lay clerks and chorister parents

The Precentor was appointed to bring change by delivering a new music strategy. There is much to be commended about this strategy. However, it was not properly communicated or consulted upon. The report identifies silo working within the cathedral to be a particular challenge, which meant that the Precentor felt that he was largely working alone. This was combined with management styles among certain senior leaders which many found difficult and which were not themselves appropriately challenged. Indeed underlying cultural issues made challenging such behaviour difficult.

At around the same time the requirements for livestreaming and recording services brought about by Covid meant that contracts with musicians, especially lay clerks, required revisiting. Once again, the combination of silo working and leadership styles meant that this was undertaken largely independently by the Precentor, causing significant discomfort to all involved. It was felt that Chapter simply did not understand the musical side of the Cathedral.

Communications have often been inadequate with chorister parents due to the absence of positive working relationships within the music department and strategic uncertainty. A lack of intervention from the rest of Chapter meant these stakeholders were not adequately informed, creating tensions.

This period did see a particular HR grievance brought, and a whistleblowing investigation. While the details of these must remain confidential, the report finds significant failings with the way both were handled, particularly in the way information was shared with relevant parties, contributing to a growing atmosphere of mistrust.

Information was held within very tight circles throughout this period. While confidentiality is always an important consideration, the proper leadership and governance of a cathedral requires those who are involved in decision-making and oversight to be kept appropriately informed. Despite their best endeavours, which were significant, the Non-Executive Members of Chapter and Mr Mark Byford, as Senior Non-Executive Member (who worked tirelessly, in his role, to address the issues of concern) were often not fully in possession of the relevant facts which prevented them from playing their proper part in addressing the challenges the Cathedral faced. Given the significant experience of those on Chapter, including the non-executive members, their full knowledge of certain issues during this time could have led to different decisions and therefore different outcomes.

While these are important failures, the report points out that in the ensuing crisis, they were made worse by the outpouring of abuse on social media, as senior leaders had to manage in the face of significant vitriol.

Recommendations

The Review Team has listed 46 recommendations stemming from their findings. They recognise that this is a large number, but also state that many of these are already in the process of being implemented, and others will be straightforward to implement.

Perhaps the most significant findings of the Review are:

- The need for a culture change within the cathedral, towards “radical candor®” as recommended in Church of England safeguarding training: an approach developed by Kim Scott which both ‘challenges directly’ and ‘cares personally.’
- This would then enable information to be shared appropriately, and decisions to be made by the right people, based on an adequate assessment of the situation

The main recommendations will be summarised under the following headings:

- Leadership
- Management
- Governance
- Communication

Leadership

The recommendations in this area have two overarching principles:

- The Cathedral needs to build a culture based on the principle of “radical candor®” as described above.
- The Chapter and senior leaders need to have transparency as a guiding principle and regularly seek advice about information sharing, not always regarding data protection as an obstacle.

The actions seek to bring about a cultural change. This will mean updating the Culture Action Plan to take account of the Review’s detailed recommendations and ensuring that this Plan is communicated and embedded through a clear strategy. The Church of England’s healthy cultures guidance will be essential in formulating the plan as it provides “looked for” behaviours in a healthy culture.

As part of this cultural change, it will be necessary for Chapter and SET to discuss past barriers to communication. Additionally, part of a healthy culture will require bad behaviour to be called out and investigated appropriately and in a timely manner.

“Care” should be a core value as this cultural change is implemented. Pastoral relationships need to be nurtured, and the music department in particular needs to be supported by Dean and Chapter.

Management

The recommendations in this area can be summarised as follows:

- Silo working needs to be broken down so that music can play its full part in the mission of the Cathedral as well as in enhancing the worship.
- Some specific HR recommendations, some of which must necessarily remain confidential, but others of which, include the management of people, and the investigation of grievances

The Review calls for wider membership of the Senior Executive Team (SET), to include senior lay staff. The Director of Music must be a member of SET to ensure proper consideration of musical needs, and clear accountability.

The Review makes specific line management recommendations, suggesting that the Precentor should continue to manage the Director of Music, but all other staff in the music department should be managed by the Director of Music. Nevertheless, it is of key importance that the Director of Music should have direct access to the Dean as and when necessary.

The Music Strategy needs to be revisited. There must be consultation on its contents with key stakeholders and, following any revisions, its contents must be widely shared so that everyone can support its subsequent implementation.

In relation to HR matters the Review calls for a tightening of some key processes. Where difficult HR issues arise they should be dealt with by at least two members of the SET. In the case of staff grievances there need to be fuller and more transparent findings, taking appropriate legal advice.

Performance management needs to be tightened to ensure there is adequate training to fulfil the requirements of a role description and clear accountability. Specific suggestions include the need for training in conflict resolution for all members of SET.

Governance

In summary, the Cathedral must build on the excellent work carried out to implement the Cathedrals' Measure to ensure that the experience and skills of non-executive members are drawn on in ensuring appropriate accountability and support to executive functions.

The Review makes specific recommendations around the relationships between Dean, Bishop and Senior Non-Executive Member, to ensure appropriate accountability. Praise is given to the current non-executive members of Chapter, along with a recognition that a skills matrix will be necessary to ensure that the required skills are present moving forward.

Specific recommendations include the need for a clearer understanding of Schemes of Delegation; a suggestion that Chapter meets more frequently; and a further suggestion that there is an annual residential for Chapter members.

These recommendations are intended to be part of better understanding between executive and non-executive members, since each function brings its specific challenges. The role of Dean in this regard is specifically complicated, and needs to be fully understood.

A working group has already begun a Review of Governance. This work is commended by the Review and it is recommended that it continue.

Communication

A report has already been written by an experienced communications consultant and it is suggested that its findings are implemented.

Particular areas that require significant work include communications with different members of the musical community, including chorister parents. The Review recognises that communication is not just about information (though that is important) but also involves building relationships of trust. This work will be essential as the Cathedral moves forward.