

Bath & Wells Diocesan Academisation Strategy - February 2026

This Diocesan Strategy (Strategy) reflects the development of the Multi Academy Trust (MAT) landscape in our Diocese and the revised Church of England Model Articles of Association dated September 2023 for MATs which include Church Schools, and the revised Memorandum of Understanding (MOU) dated September 2023 between the National Society and the Secretary of State for Education, both which require and reference a published Strategy for each Diocese.

This Strategy sets out the overall position of the Bath & Wells Diocesan Board of Education (DBE), referring to more detailed documents that sit behind it where appropriate. It aims to capture the local expectation with respect to:

- Governance structures within a MAT
- The relationships with key stakeholders
- Our process of due diligence, the provision of consent to conversion to academy, to open academy transfers and trust mergers

This Strategy will normally be reviewed annually by the DBE, submitted to the Regional Director (RD) for reference and published on our website.

DBE Vision & Education Strategic Plan Our Strategy is in line with our Diocesan Strategy and Outcomes along with the DBE Measure.

John 10:10 "That they may have life, life in all its fullness."

Resolutions (previously November 2019 & January 2023)

- The DBE believes that academisation is the most viable and sustainable option for our church schools within the context of the South West.
- The DBE does not support new hard federations.
- The DBE believes there is sufficient trust capacity to accommodate church schools between the mixed trusts we currently work with.
- The DBE recognises that in the current educational landscape there is a need for further trust amalgamations or collaborations to secure long term sustainability. The DBE will consider consenting where a Trust with Church Articles is amalgamating/merging with a Trust that has or is willing to adopt the same or stronger foundation representation. Trust amalgamation/mergers will be considered on a case-by-case basis. Each case will reflect the wider strategic context at the time

of the merger as well as evidence that the Christian Distinctiveness of the schools involved will be supported to flourish.

The Strategy adopted by the DBE has the very best interests of children across the diocese at heart. Acknowledging the context of the education system at local, regional and national levels the most secure future for our church schools is within strong MATs. The DBE takes seriously its role in ensuring that church schools, and their valuable presence in communities, can flourish now and are secure for the future. They are aware that in any system there may be exceptional circumstances that require a unique solution and will consider these on a case-by-case basis. Strong MATs which share a genuine heart for our church schools and communities, for partnership working with, and a recognition of the accountability to, the diocese are at the heart of our Strategy. The DBE and education department will always ensure that schools seeking to join MATs are aware of the options available to them and will support them in their discernment process.

Strong Mixed MATs

We acknowledge and concur with the work the Confederation of School Trusts (CST) has done in defining the attributes of a strong trust but have extended this to help us identify a strong *mixed* MAT (a trust with church and community schools):

- Quality of Education: Good SIAMS as well as Ofsted outcomes & 'added value' data.
- Expert Governance including the appropriate ratio of foundation appointment & a focus on the Distinctly Christian ethos within the church school in the MAT.
- Workforce resilience & wellbeing recognising the need for replenishment and renewal of Christian Distinctiveness.
- Efficiency & effectiveness Around finance and operations.
- Public benefit & civic duty including the church community and our basic SERVE (Support, Encourage, Resource, Value, Equip) model.

How we work with our Strong Mixed MATs

The DBE has a Memorandum of Understanding (MOU) with each mixed MAT which sets out our working relationship regarding ethos, governance (including appointments), staffing and leadership, Collective Worship and RE, chaplaincy, admissions, inspection & compliance and community engagement.

Each MAT has Foundation Members, Trustees and Local Governors (or alternative name) who have been approved by the DBE as having the requisite skills. This is via an on line application form with agreed criteria for approval; each applying Foundation Trustee has a conversation with an education department officer to ensure they understand the role and wish to proceed We require a majority or equality of Foundation Members and Trustees in any MAT with a former VA unless there are exceptional circumstances, which would be considered for approval by DBE, and a minimum of 25% Foundation Members and Trustee

for MATs with only former VC schools within the MAT. Local governance remains as is either minority or simple majority. Several minority MATs have moved towards an equality model as they see the advantage of working with both former VC and VA Schools, particularly in a specific geographical area; the DBE supports this move. Further, the DBE reserves the right to withhold consent for an individual VC to join a minority MAT where neighbouring VA schools might be left in isolation. Increasingly we are supporting groups, rather than single schools, joining a MAT together.

We hold an annual meeting with our MAT leaders and have regular forums for Foundation Members and Trustees. We offer initial and ongoing training and events to all foundation representatives.

Each MAT must include a diocesan representative nominated by the Diocese to take part in the recruitment process for CEOs, Headteachers of Church Schools and, where appropriate, senior leadership roles in the MAT or church schools. We work closely with our MATs to ensure this is embedded in their HR procedures, ideally with standardised paperwork for recruitment packs.

Each MAT has a lead for Christian Distinctiveness, a lead for RE and a lead for Church School recruitment. The diocese will support these roles through on-going training and networking.

Church schools in MATs receive the same guidance and materials for Collective Worship and RE as maintained schools and are subject to the same SIAMs inspections.

We encourage MATs to engage with chaplaincy and will work in partnership to seek ways of securing this. We acknowledge this is work in progress, with further work needed to develop and share the many different models of Chaplaincy; paid and unpaid, for the children and young people and/or staff/Senior Leadership Team (SLT). Further details of potential models are available from our Go Team.

Maintained Church Schools seeking to join a MAT

The consent of the DBE is required *before* the school can apply to the Department of Education (DfE) to become an academy and the Advisory Board (AB) consider the application. This consent is granted subject to conditions which must be met before the conversion is finalised.

To obtain a conditional consent letter, the governing body submits the published application form to the education department, we provide guidance on the questions that are explored. If the school is a VA this passes to the DBE to grant consent, if VC officers can initiate the diocesan consent letter unless they consider there should be a DBE decision. The conditions for full consent are set out in this *conditional* consent letter, which also contain conversion information for all governors, including the costs involved which are no longer supported by a conversion grant.

Circumstances where consent may reasonably be withheld

The MAT does not have Church Articles.

The MAT is not, in the reasonable opinion of the DBE, a strong mixed MAT at the time the application is submitted. For example, the DBE is concerned about recent SIAMS or Ofsted outcomes or another matter about a school within the MAT, church or non-church. This might just be a timing issue.

Although the MAT is a strong mixed MAT, there is another which would be a better geographical fit or fits more with the MAT's approved growth plan which would appear to be in the best interests of the school longer term.

Although the MAT is a strong mixed MAT it does not have the required ratio of foundation appointments or made a commitment to achieve that ratio.

Academy Transfers & MAT Amalgamations/Mergers

Trusts seeking consent to an Academy Transfer (e.g. SAT joining a MAT or the merger or transfer of one or more MATs) also require consent from the DBE.

Each church academy within the diocese is subject to arrangements which will need to be moved ("novated") from one MAT to another when an academy transfers, and that cannot be done without DBE consent because we are a party to those arrangements.

Withholding consent and the conditions for consent will be the same as those for initial conversion and incur a cost.

MAT mergers have their own application process from the DfE, before an application is made a steering group is formed with members from both trusts and usually a Diocesan officer to start working together and drawing up the application. If a mixed trust is proposing to merger with a non-mixed trust then a conversation is sought at the earliest opportunity between the chair and CEO and the Diocese to explain the mixed MAT model and ensure our vision and values are aligned before proceeding any further, this includes our fundamental requirement that any new entity is a mixed trust model.

Direct Academy Orders (DAO)

Where the Secretary of State, acting through the RD, issues a Direct Academy Order (DAO) consent from the DBE is still required.

The process is different because a DAO is made without an application from the governing body (although we always include them in discussion as much as we can), but any conversion of a church school to academy requires the consent of the Diocesan Authority, which is the DBE.

We expect that, in line with the MOU between the National Society and the Secretary of State referred to in the introduction, the RD's office will have been in discussion with our education department to discuss and agree the best MAT for the school.

The conditional consent letter in such cases may be sent after the Direct Academy Order (DAO) is granted but still sets out the requirements of the DBE in order for the conversion to go ahead, which will be the same as any other conversion.

Direction to Transfer an Open Academy or whole MAT

On occasion the RD will direct a MAT to transfer some or all its academies to another MAT.

As with DAO, we expect that, in line with the MOU between the National Society and the Secretary of State referred to in the introduction, the RD's office will have been in discussion with our education department to agree the best MAT for the schools concerned.

The conditional consent letter in such cases may be sent after the Direction to Transfer is issued but still sets out the requirements of the DBE for the transfer to go ahead, which will be the same as any other open academy transfer.

Cross Diocese and Ecumenical Working

Bath & Wells Diocese already works with neighbouring Dioceses (Exeter, Salisbury and Bristol) where this is seen as the best option for our church school, we expect this to continue to grow as MATs enlarge and merge. Our expectations are that Bath & Wells will be represented via a Corporate Diocesan Member (CDM) on each joint MAT and signed up with a Cross Diocese MOU, an extension of the existing MOU we have with each MAT. In most cases there will be a lead diocese, initially where the trust is based, but this could change as the MAT expands into another diocese with a greater number of schools and/or pupils. Our aim is to make any joint diocesan working as transparent as possible for the MAT, accepting that each Diocese has a slightly different way of working.

We also work with our Methodist colleagues and have 5 joint Anglican Methodist schools and one purely Methodist School within our diocese. 3 schools that are joint Anglican/Methodist are within BWMAT and 1 joint school is within Midsomer Norton Schools Partnership (MNSP). Following publication by the DfE of a set of solely Methodist Articles we have developed, in conjunction with our Methodist colleagues, a set of joint Anglican/Methodist Articles approved by the DfE and accompanying MOU which allows other joint Anglican/Methodist schools to join mixed trusts.

Engagement with the Regional Directorate (RD) & Team

A structure of meetings at several levels already exists to ensure regular and timely contact. This includes:

- Termly meetings (6) with the RD and South West Diocesan Directors of Education (DDEs)
- Long termly meetings (3) with the RD Team and DDE and Academy leads
- Fortnightly meetings with the RD Team, Somerset Local Authority (LA) and Diocese
- Other ongoing ad hoc contact when needed usually with either the RD lead for a specific MAT or the RD area lead.

New Church Academies

The diocese has already been successful in bidding for new free church academies via a MAT which is the only way currently a new church academy can open. We are keen to continue this process and as such look for opportunities and partners. This relies on intelligence via LA plans for new homes, Place Planning and a MATs appetite to sponsor a new church academy. As the school is often the only communal facility within these new housing developments, we see a moral purpose in trying to provide opportunity at the earliest planning stage for wider community use and possible missional work.

School Closure

The diocese supports the premise that closing a school, particularly a rural one, should be a last resort. However, with a falling birth rate and schools not always in areas that young families can afford to buy a home in, this is a real threat for our small schools and sadly we have seen a small number become vulnerable for closure. The Diocese will work with the LA, MAT and/or RD to ensure all avenues have been explored before any final decision is made This includes reducing PAN and looking for alternative educational uses for the school such as a change of use to provide a special provision as long as it is permissible under the school's Trust Deed

Last review date: April 2024

Next review date: February 2027