



## **Bristol Diocesan Academisation Strategy**

**September 2024**

*This document constitutes the published 'Diocesan Strategy' for the Diocese of Bristol, approved by the Bristol Diocesan Board of Education, as referenced in:*

- *The Department for Education Academy Articles of Association, for use by multi-academy trusts with Church of England schools (Sept 2023)*
- *The Memorandum of Understanding between the National Society and DfE (September 2023)*
- *Commissioning High Quality Trusts (DfE, July 2023)*

### **Introduction:**

Bristol Diocesan Board of Education (DBE) and school leaders aim to ensure that church schools remain a vital and thriving part of the diocese and the country's education provision for the long-term future, building on over 200 years of heritage.

The DBE encourages the leaders of every church school, VC and VA, rural, urban, large or small, to reflect on how we might work together: school, parish, families and DBE, so that we can ensure this aim is achieved.

### **The DBE Vision**

The Bristol Diocesan vision for the future is to see 'Humanity Reconciled, Creation Restored'. This is to be enabled through the five year strategy of 'Transforming Church. Together' which invests in the way we work together. It reimagines the way we form collaborative relationships. Our strategy includes specific transformation strands as well as the ongoing operations of diocese teams whether in central offices or parishes. Our culture of working and being together seeks to demonstrate four key values of bravery, openness, generosity and creativity.

The DBE supports this vision and specifically, a desire for children and young people, the adults they work with and families with whom they are connected, to live and learn in communities of love, as flourishing human beings.

### **The vision of the DBE is simple: Flourishing. Together**

For this to happen, we need schools to thrive within suitable models of leadership and collaboration. Therefore our vision is to facilitate the further development of multi academy trusts across the diocese that stand the test of time: preserving, protecting, and enhancing each church school's deeply Christian vision, enabling children and adults to flourish.



Schools work in a context of a significantly changed role for the LA with its focus on statutory duties, namely place planning; admissions; alternative provision and exclusions. This change has also had significant impact on the provision to schools of school improvement support.

The Secretary of State recognises the responsibility of DBEs to all the church schools within their diocese and the children in those schools whether these are maintained schools or academies. The Secretary of State also acknowledges and accepts that it is for DBEs to plan strategically for the exercise of this responsibility, including in relation to school improvement and to work closely with the Regional Directors (RDs) in doing so.

Bristol DBE believes it is important for all schools to maximize the opportunities offered by the structural changes across the educational landscape and culture. The DBE believes the formal school collaboration offered by Trusts is a key to mitigating risk and protecting and progressing church school education in the future.

The DBE's intention to work with both LA maintained church school leaders and Trust leaders to secure long term sustainability plans is part of the exercise of our responsibility to church schools across our diocese to protect and preserve church school education provision for the next one hundred years.

## **DBE key principles:**

The DBE approach is based upon the following principles:

- Bristol DBE strongly advocates that all Church of England schools should be proactive in planning for the future and develop strong collaborative arrangements. It recognises that for some LA maintained schools within the Diocese, this will lead to discussions about conversion to academy status as part of a Multi Academy Trust, or moving from a Single Academy Trust into a Multi Academy Trust.
- Bristol DBE will encourage schools to join Multi Academy Trusts where collaborating with other schools in a local geographical partnership can maximise the educational experience of children.
- Bristol DBE will only provide permission for academy conversion where a maintained CofE school is seeking to join a Trust with Church of England articles of association, where representatives of Bristol DBE make up at least 25% of the Members and Trustees for former VC schools, and a equality of Members and Trustees for former VA schools.
- Trust structures and governance must reflect the Christian foundation of CofE schools and preserve the level of foundation representation at local governance level.



- The chosen Trust agrees to continue its partnership with the DBE in the selection of suitable school leaders and the development of the Christian character of its CofE schools, meeting the requirements outlined in the articles of association.
- Bristol DBE sits as a Diocesan Corporate Member on the Members Board
- The DBE will consider consenting to trust mergers where Trust with Church Articles are merging with a Trust that has or is willing to adopt similar or stronger foundation representation. Trust 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.

## **Strong Multi Academy Trusts:**

Strong Trusts 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 Confederation of School Trusts has interrogated a wide range of research to identify the key features of a strong Trust. They have highlighted the following domains:

1. **Strategic governance:** The trust anchors its strategy in the needs of its schools, the communities they serve and the wider educational system in line with its charitable objects.
2. **Expert, ethical leadership:** The accounting officer and executive team create a culture of expert, ethical leadership based on the Seven Principles of Public Life (the Nolan Principles). They create a culture of one organisation, built around the trust's purpose and values.
3. **High quality, inclusive education:** The trust creates a culture that is motivating and ambitious for all, especially disadvantaged children, and children with SEND, so that all pupils can achieve their potential.
4. **School improvement at scale:** A strong conception of quality and culture of continuous improvement is pervasive across all the schools in the group.
5. **Workforce resilience and wellbeing:** The trust creates a positive working culture for all staff that promotes collaboration, aspiration, and support.
6. **Finance and operations:** Everyone in the organisation recognises the importance of effective and efficient use of resources for the wider benefit of all pupils.
7. **Public benefit and civic duty:** Part of the culture of the trust is to work beyond its own organisation with other trust leaders and civic actors for the wider common good.



In addition, a strong Trust with Church schools will have a strong focus on developing the distinctively Christian ethos within its Church schools leading to consistently good SIAMS outcomes, and a sense of moral responsibility to serve the common good in the communities it represents.

## **Criteria for Foundation Members, Trustees and Local Governors:**

The DBE asks Trusts to consider and nominate 'candidates' who meet the 'DBE Requirements of Foundation Governance' detailed in this policy. Foundation Trustees can belong to a broad tapestry of Christian groups.

Foundation governors must belong to one of the following groups:

- A regular member of a Church of England Church who is committed to upholding the ethos and values of the Church of England foundations of the Church schools in the academy trust or
- A regular member of one of the member Churches of 'Churches Together in Britain and Ireland' who is committed to upholding the ethos and values of the Church of England foundations of the Church schools in the academy trust or
- In exceptional circumstances a person who is not a regular member of one of these Churches, but is committed to upholding the ethos and values of the Church of England foundations of the Church schools in the academy trust.

## **Foundation Governance:**

Bristol DBE require Trusts with former VA schools to have either a majority or equality of foundation representatives at both Member and Trustee level.

A minimum of 25% foundation Members and Trustees is required for Trusts with only former VC schools. Bristol DBE would not consider VA schools joining a Trust with minority representation.

Bristol DBE would expect to be a Diocesan Corporate Member on all Member boards of Trusts with Church of England schools within the Diocese.

Governance at a local school level remains as it was prior to joining the Trust, with former VC schools having minority foundation representation, and former VA schools having a majority foundation representation.

Bristol DBE reserves the right to withhold consent for an individual VC school to join a minority Trust where neighbouring VA schools might be left in isolation. Increasingly Bristol DBE are encouraging groups, rather than single schools, to join a Trust together.



## **How the DBE will work with MATs:**

The DBE is fully committed to supporting school and trust leaders in the protection, preservation, and promotion of the Christian character of all Church schools through the ongoing work of the Education team in offering a wide variety of training opportunities, supporting individual schools and Trusts, and building mutually supportive relationships with schools, Churches, and RE subject leads.

The DBE is committed to meeting all of its obligations as outlined in the Articles of Association (2023) and the national MOU between the DfE and National Society (2023)

The Articles of Association used for any new trust to set up must be the latest version agreed by the DfE (see appendix A). Existing Trusts in the Diocese of Bristol will not be expected to take on any new version of the nationally agreed Articles immediately, they will be expected to update to the latest version (with any required changes in governance) at their earliest convenience or when any other changes in their Articles of Association are made.

Bristol DBE has a further Memorandum of Understanding (MOU) with each Trust 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.

As discussed above, each Trust has Foundation Members, Trustees and Local Governors (sometimes called by an alternative name) who have been approved by the DBE as having the requisite skills.

We hold an annual meeting with our Trust leaders and regular forums for Foundation Members and Trustees. We offer initial and ongoing training and events to all foundation representatives. In addition, we encourage CEO's to take an active role in our Trust leaders network.

Each Trust must include a diocesan representative nominated by the Diocese to take a full and active role in the recruitment process for CEOs and Headteachers of Church Schools.

Each Trust will be expected to have a lead(s) for Christian Distinctiveness and engage with training and development offered by the DBE.

We encourage Trusts to engage with chaplaincy and will work in partnership to seek ways of securing this.

## **Maintained schools joining Multi Academy Trusts:**

DBE consent will be required in respect of converter academies (those not forced to convert by the Regional Director). This is not a formality. The DBE will normally



grant conditional consent to conversion to academy status, or to schools transferring from one trust to another, providing certain conditions are met:

- The school consults the DBE as soon as governors begin to discuss the process of academisation whether to a particular Trust or in general terms
- The Trust is approved by the DBE and includes articles outlining the proportion of Church representation at each level of governance: majority, equality or minority.
- The Trust and the Diocesan Board of Finance (of which the DBE is a committee with delegated powers) or other Site Trustees must enter into a Church Supplemental Agreement in relation to each school site (excluding any playing field land, if owned by the local authority, for which there will be a 125 year lease with the LA) in a form approved by all parties, based on the form included in the Model Documents issued by the DfE.
- The Trust must enter into a Commercial Transfer Agreement for each school with the local authority and the governors in the form included in the Model Documents.
- The Trust must enter into a Master Funding Agreement with the Secretary of State in a form approved by the DBE, and a Supplemental Funding Agreement for each academy based on the forms included in the Model Documents
- The receiving Trust enters an agreement to fund the DBE for its work in the process at their given rate.

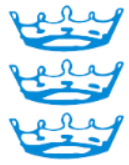
## **When might the DBE reasonably withhold consent:**

The Trust does not have Church Articles.

The Trust is not, in the reasonable opinion of the DBE, a strong Trust 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 Trust, with or without religious designation. This might just be a timing issue.

Although the Trust is strong, there is another which would be a better geographical fit or fits more appropriately with the Trusts approved growth plan which would appear to be in the best interests of the school and children in the region in the longer term.

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



## **Direct Academy Orders:**

Where the Secretary of State, working through the Regional Director, issues a Direct Academy Order to a Church of England school which is underperforming according to OfSTED outcomes, the DBE will advocate for that school to transfer to an established Trust with Church articles, with the receiving Trust acting as the sponsor.

We expect that, in line with the MOU between the National Society and the Secretary of State, the Regional Directors office will have been in discussion with the DBE to discuss and agree the best Trust for the school.

The DBE will not permit Church of England schools to be sponsored by Trusts without Church articles.

## **Directed Transfers:**

On occasion the Regional Director will direct a Trust to transfer some or all of its academies to another Trust.

Bristol DBE expect that, in line with the MOU between the National Society and the Secretary of State, the Regional Director's office will have been in discussion with the DBE to agree the best Trust for the schools concerned.

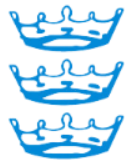
## **Working with neighbouring Dioceses:**

The DBE welcomes collaboration and cooperation with neighbouring dioceses. Trusts that cross diocesan borders can be considered. Bristol DBE must be a corporate member of any trust which includes a Church of England school from the Bristol Diocese.

The DBE will consider using a Cross Diocese MOU and implementing a lead Diocese arrangement where this is considered to be the most effective way for all parties to establish an effective and beneficial working relationship.

## **New schools and school closures:**

Bristol DBE has, and will continue to, bid for new free Church academies to be established through a Multi Academy Trust, where LA place planning and the development of new housing has shown that there is a need. Such schools often function as the central base of new housing developments and can provide a facility for community use and possibly house a newly established Church.



**Diocese of Bristol**

†TRANSFORMING CHURCH.  
TOGETHER.

The DBE endorses the premise that closing a school, especially one in a rural area where the alternative may be many miles away, should always be a last resort. However it recognises that, with falling birth rates and young families often priced out of some areas, some of our schools are in a vulnerable position. The DBE is committed to working with the RD, LA and Trust to seek alternative solutions, including using some of the capacity at the school to provide specialist provision, before any final decision is made.

**Last review date: July 2024**

**Next review date: July 2025**