

Hereford Diocesan Board of Education Academisation Strategy

Introduction

A flourishing education system places children instinctively at the heart of decision making and leadership thinking at all levels. As a result, all agendas, structures, budgets and systems are deliberately designed around the flourishing of children. Although measurable academic excellence is central to flourishing, it is not the full story – the moral, spiritual, cultural and relational development of pupils offers a broader, more expansive vision of what education is for.

From Our Hope for a flourishing School System: Deeply Christian Serving the Common Good 2023

The vision, mission and ministry of Diocese of Hereford is focused on living out our values in every church, home, school and community across our diocese: Christlike, prayerful and engaged.

Our shared diocesan strategy seeks to unite our diversity around a common vision to proclaim Christ and grow disciples in communities marked by our behaviours towards one another and outwardly to others in our communities. We are called to partner with a generous God so that lives are changed by an encounter with Christ and this overflow into families, homes and communities which will be changed for the better.

The last decade has brought significant changes to the education landscapes, particularly around academisation. The role and capacity of local authorities has changed and continues to change, as academy trusts, have significantly grown within the sector. This strategy sets out the strategic plan for academisation and organisation of existing Church of England schools and academies within the Hereford Diocese.

The following three trusts are the only Multi-Academy Trusts that the Hereford Diocesan Board of Education (HDBE) will consider providing conditional consent, for the academisation of the remaining Maintained schools and Stand-Alone Academies. All three trusts are predicated on the current Model Articles of Association and adhere to the Memorandum of Understanding between the National Society and DfE.

- Diocese of Hereford Multi-Academy Trust (DHMAT)
- Orchard Multi-Academy Trust
- Shropshire Church of England Academies Trust

Due to the fact that the HDBE has the strategic responsibility for and commitment to the sustainability of the trusts within this strategy and given the local context with the Diocese of Hereford, they will not consider any Maintained school or Stand-Alone Academy joining any other trust and will not support the setup of any additional trust predicated on Church of England Articles of Association.

Where are we now?

We seek to ensure that every school and academy flourishes and delivers an education for its communities, which enables children to live life in all its fullness. This can be achieved with a range of different organisational structures.

Multi-Academy Trusts (MATs)

Today over 50% of pupils in state-funded education already study in academies. A multi-academy trust is a charitable organisation which oversees the running of multiple schools in England with 'academy' status.

Academy Trust Governance

As the accountable body, the trust board is the key decision maker and is accountable to the Members. It may delegate operational matters to executive leaders and governance functions to committees (including local governing boards (LGBs) in multi-academy trusts), but the trust board as a corporate entity, remains accountable and responsible for all decisions made and executive leaders operate within the autonomy, powers and functions delegated to them by the trust board through the Scheme of Delegated Authority (SODA).

Multi-academy trusts, due to their scale, have greater opportunity and are expected to employ a central executive team to help them discharge their oversight responsibilities.

In trusts, the purpose of governance is to provide:

- *strategic leadership*
- *accountability and assurance*
- *strategic engagement*

*The board has collective accountability and strategic responsibility for the trust. It has a focus on ensuring the trust delivers an excellent education to pupils while maintaining effective financial management and **must** ensure compliance with:*

- *the trust's charitable objects*
- *regulatory, contractual and statutory requirements*
- *their funding agreement*

The board also has:

- *strategic and statutory responsibility for [safeguarding](#) and [special educational needs and disabilities \(SEND\)](#) arrangements within (and across) the academy trust ensuring the promotion of pupil welfare and for keeping their estates safe and well-maintained*
- *a role in making sure that it delivers its commitment to other schools and academies, however it is done*

The trust board is legally responsible as the employer, for every employee employed by the trust, whether they are based at the centre or in individual schools. The responsibility for everything from health and safety, to safeguarding to staff-wellbeing, comes back to the trust board of directors. Some of these functions can be delegated to local governing bodies under a scheme of delegation but it is the trust board, which is ultimately accountable.

Historic Choices

Much of the current landscape, within our Church of England schools can be traced back to decisions taken at the time of the 1944 Education Act. Decisions were taken at a local level, that determined which schools would become *aided* by the newly formed local authorities and which would be fully *controlled* by them. Decisions taken at that time, determined the governance structures in place within our Church of England schools and academies today. This point serves to illustrate those decisions on changes to our governance and organisational structure now, will be significant for us, long into the future of education within this diocese.

Moving forward together

As our education system continues to evolve, the Hereford Diocesan Board of Education's strategy is to develop and grow strong organisational structures, which will be sustainable, stand the test of time and the inevitable personnel changes within leadership and governance.

Our Vision for Education in the Diocese of Hereford

Since the work of Joshua Watson in the early 1800s, the Church of England has been involved in delivering education for the whole community. This continues in our work in support of the Church of England's 2016 Vision for Education and Our Hope for a Flourishing Schools System 2023. Our mission is to ensure that every single child in our diocese, has access to a high-quality education which will enable them to flourish and to live life in all its fullness (John 10:10).

In its commitment to education, the Hereford Diocesan Board of Education (HDBE) embraces the national Church of England's Vision for Education: *Deeply Christian, Serving the Common Good* (2016). In providing a holistic, distinctive, inclusive and effective education, which is 'hospitable to diversity, respects freedom of religion and belief, and encourages others to contribute from the depths of their own traditions and understandings' (*Church of England's Vision for Education page 3*), the HDBE looks to all Church schools and academies to make an outstanding contribution to the lives and opportunities of our children and young people.

The HDBE and its academy umbrella arm (Diocese of Hereford Educational Trust (DHET) Ltd) are committed to working with all strategic partners and stakeholders to provide the very best learning opportunities for all children and young people, irrespective of ability, gender, sexuality, culture, faith or no faith background in all of its Church schools and academies.

Working with Local Authorities

The HDBE's commitment includes being proactive in supporting models of school organisation and leadership that ensure the best outcomes for children, where all schools are effective, populated by the most skilled leaders and teachers. As a diocese we are keen to work with and support the continuing work of local authority colleagues. This continues to be important in all our schools but especially within the maintained sector. Where capacity for support from local authorities to support school is reduced, we will play an active role in strengthening our education system for all schools.

Church of England Vision

The HDBE expects all church school learning communities to be built on clear foundations which embrace an underlying Christian ethic that supports a strong moral purpose, which, in turn, promotes high aspiration and excellence. Church school communities should demonstrate a collective responsibility for the results and achievement of all children, working to an ethic of 'leaving no one behind', within and beyond individual school communities.

The HDBE also expects that in its schools and academies, children and young people will gain a rich understanding of the Christian tradition and a positive encounter with Jesus that will provoke them for the whole of their life so that 'they might have life and have it abundantly' (*John 10:10*). The national vision articulates four key elements that contribute to a deeply Christian learning experience: educating for wisdom, hope, community and dignity. The HDBE is committed to working in partnership with its schools, academies and other stakeholders to create and deliver learning communities that exemplify these four key characteristics.

Reorganisation within our Changing System

The view of HDBE is that all Church of England schools should be proactive in planning for the future, in developing strong collaborative arrangements, and recognises that for some within the Diocese of Hereford family of schools this may lead to discussion about conversion to academy status as part of a Multi-Academy Trust or moving from a Single-Academy Trust into a Multi-Academy Trust.

Memorandum of Understanding

The HDBE strategy adheres to the Memorandum of Understanding (MOU) between the National Society and DfE which has the approval of the Secretary of State for Education (updated September 2023). It also takes full account of the Academies Act 2010 and the Education and Adoptions Act 2016.

The Church of England academies: model Articles of Association (September 2023) link to the latest MOU and replace all previous versions. It should be used by academy trusts in the process of being established and by existing multi-academy trusts updating their articles or taking in additional church schools. This document consolidates the Church of England majority and minority Articles of Association, predicated on the Church of England majority model with flexibility to adapt according to the published Diocesan Strategy.

The Members appoint the majority of the Board of Trustees (also known as Directors under company law). The Board of Trustees (Directors) run the company. Trustees (Directors) are appointed on the basis of skills, of being able to hold the CEO to account and to represent the interests of the Members as dictated and directed by the Objects of the company. The company must be established using the 2023 model Articles of

Association that have been approved by the Church of England with the DfE. This safeguards the instrument that has established the Church school at its foundation: The Trust Deed.

Church of England multi-academy trusts open to all schools

Church of England Multi-Academy trusts will not be exclusive trusts for church schools or exclusive trusts for historic Ofsted outstanding and good schools. They are open to any and all schools that decide to join them (subject to due diligence and a full business plan).

Non-Church community schools can join a Church of England trust. Their status and ethos are protected, and it will be expected that such schools will play a full and strategic role in the development of the trust. Church trusts wishing to admit non-Church academies must include the HDBE in such decisions.

Church of England schools and non-Church of England multi-academy trusts

It is not possible for a Church of England school to join a non-Church of England multi-academy trust other than in very exceptional circumstances (such as when a non-Church of England trust is the only available sponsor for a school placed in special measures). Church schools within the Diocese of Hereford must join a trust that is identified within this strategy.

Church of England multi-academy trusts and vulnerable schools

Church of England trusts will play a full and committed role in school improvement and must be ready and prepared to admit vulnerable schools to the trust where and when the HDBE makes such a request.

The HDBE recognises that the Education and Adoptions Act 2016, Section 7, places a duty on the Secretary of State to issue an Academy Order when a school is eligible for intervention due to an Ofsted judgement of inadequacy. The HDBE expects that schools subject to such intervention will be placed in secure Church trust homes and the diocese will seek to influence existing Church trusts to invite such schools to join them; there will be no 'lost sheep'.

While considering the management and growth of any multi-academy trust, it is important to maintain a balance between the schools which need a great deal of support, drawing on capacity, and those that need much less support and are able to add to the multi-academy trust's capacity to support others. It may therefore be possible to bring schools who need less support, into a multi-academy trust more quickly than those who have significant support needs.

The HDBE has an on-going commitment to the flourishing of all schools within the Diocese of Hereford and trusts identified in this strategy. So that all individual schools may flourish, the HDBE may ask that trusts welcome schools that require greater support when providing consent for those that will bring additional strength. It may also be the case that when providing consent for larger, more financially sustainable schools that the HDBE asks for smaller schools to be considered to convert into the trust as the same time. This will ensure a good balance of schools across all trusts, providing a rich and diverse mix of schools within trusts and a more sustainable academisation landscape.

Multi-academy trust options for Church schools in the Diocese of Hereford

The HDBE will continue to work with existing trusts to develop a strategic and coherent plan for trust growth determined in partnership with the HDBE. The plan will include the establishment of a strong offer to converting and sponsored schools. HDBE carefully consider all schools applying for conditional consent to join an identified trust within this strategy. Consideration is given to but not limited to: the context of each school, its geographical location in relation to the trust, the trust's growth strategy and the stability of the trust in relation to the rate of its growth, proven impact on academies already within the trust, central trust capacity and the financial stability and reserve of both the converting school and preferred trust.

The HDBE are confident that the three current trust options within this strategy have capacity to secure the successful academisation of the remaining maintained Church schools within the Diocese of Hereford. The following are statements prepared by the trusts.

The Diocese of Hereford Multi-Academy Trust (DHMAT)

In the field of education within our rural region, the Diocese of Hereford Multi-Academy Trust has a vocational mission of Grace and Service, which helps to support families through education for life in all its fullness.

As our first diocesan trust, DHMAT is intentionally very closely aligned to the vision and mission of the Hereford Diocese within education. DHMAT works as a family of strong schools and has a track record of effective school improvement. DHMAT schools work together well to build a strong education offering for all children. Schools do not lose their distinctive local identity but are aligned where there are advantages available and to allow deep collaboration and reduced workload.

As a growing trust with over 3400 pupils in 18 schools, including two secondary schools, we are trust with the central capacity to provide strong support for the day-to-day work of running a school, anywhere in the Diocese of Hereford. We have a comprehensive and mature school support offer, including with safeguarding, school effectiveness, governance, estates, finance, inspection, digital strategy, legal, human resources, health and safety etc.

As DHMAT continues to grow, we are developing organisational clusters around different geographical areas within the diocese. For example, the northern and southern archdeaconries.

DHMAT operates in support of the education system for **all** schools in the diocese and exists to realise the core strategic aim of ensuring that every child receives a good education that enables life-long flourishing.

The Shropshire Church of England Academies Trust

Shropshire Church of England Academies Trust (SCEAT) is a joint partnership between Hereford Diocese and Lichfield Diocese. Incorporated in 2024, with the founding group of eight primary schools joining in the Spring term 2025, the Trust's vision is to provide high quality, fully inclusive learning opportunities to children across the early years and primary age ranges.

At the heart of our school improvement strategy is a commitment to achieving a school-led system in order to promote and secure outstanding levels of achievement for all children. The Trust has created three

geographical hubs of schools across Shropshire which are built upon a successful model of collaborative working and affords schools an opportunity to enjoy all the benefits of working closely with colleagues in other neighbouring schools who are part of the Trust. While each of the schools in the Trust is unique, and retains its own identity within its community, we understand that the mutual challenge, support and partnership that we offer each other as a Trust working together, will enable our schools to flourish.

Sharing our Christian values, being warm and welcoming to all, knowing our children and their families well and a strong emphasis on meeting the pastoral needs of pupils are at the heart of our Trust's ethos. Subject to Trust due diligence, SCEAT is open to all Church of England primary schools, community schools, or single academy trusts across Hereford Diocese or Lichfield Diocese who are within the Shropshire geographical area.

Orchard Multi-Academy Trust

Orchard Multi Academy Trust is an inclusive educational organisation dedicated to supporting both Church of England and Community academies. The Trust is committed to cultivating an environment where each school can develop its unique identity while operating within a collaborative framework that emphasises the sharing of resources and best practises. This approach allows schools to thrive individually while contributing to a collective mission focused on nurturing the whole child, encompassing both academic achievement and personal development.

At the heart of Orchard is a positive culture that prioritises health and well-being for all members of the community. This culture is built on mutual respect, valuing the contributions of every individual, whether they are pupils, staff, or families. The Trust actively promotes enrichment opportunities that bring the curriculum to life, ensuring that all pupils have access to diverse learning experiences that stimulate curiosity and creativity.

Continuing Professional Development and open dialogue are key drivers for academy improvement, enabling staff to enhance their skills and share strengths and best practises across the Trust. Orchard also adheres to best practises in financial management, ensuring that resources are allocated effectively to support educational goals.

The Trust is dedicated to providing safe, secure, and outstanding facilities for all. Currently comprising four primary schools, Orchard has a clear growth strategy aimed at extending its support and opportunities to a greater number of academies, furthering its mission to create an inclusive and enriching educational environment for all. Through this commitment, Orchard strives to empower every pupil to reach their full potential, regardless of their circumstances.

Stand-Alone or Single-Academy Trusts (SATs)

It is the view of the HDBE that schools and our education system are best served by being in collaborative arrangements and that multi-academy trusts will provide these opportunities for any Church of England Academy. However, we also recognise that we have some very strong single-academy trusts which deliver a very high quality of education for their communities.

Any newly converting school will need to become part of a multi-academy trust as the DfE will no longer approve the creation of single-academy trusts.

Existing SATs will need to discuss their future plans with the diocese, and it is our hope that eventually all will be working collaboratively within multi-academy trust families.

Maintained Schools within Existing Federations

The academisation of maintained schools within existing federations can be challenging to navigate especially where systems and services are heavily integrated across the schools. This can be complicated further when the schools within the federation are a combination of both church and community schools. The HDBE will take a pragmatic approach to understanding the relationships and shared services in these schools when considering arrangements for academisation within the published strategy.

Where the long-term sustainability and viability of the church school would be detrimentally impacted by leaving the federation upon academisation, the HDBE may look to make allowances to the preferred academisation structures.

Any provisional consent agreed by the HDBE may come with formal caveats regarding the safeguards to the church school, trust structures, local school governance arrangements and limitations to additional church schools joining the trust in the future.

Approval for academy conversion

Written consent from the HDBE is required for a school to convert to become an academy (see academisation route map). The Diocese of Hereford will hear requests from schools, under the Academies Act 2010 Section 3 iv, for consent to apply for an Academy Order. The diocese will only hear such a request following a resolution of the members, governing body (trustees) and the consent to apply from any other foundations/site trustees.

No school should embark on consideration of becoming an academy without having had a conversation with the HDBE through HDBE officers. Applications will be considered by the HDBE at their scheduled business meeting throughout the year. Discussions with schools and governing bodies can be had at any time.

School must complete the following application form - [Appendix 1 application form](#).

The trust must also be in agreement that they have capacity for the school to join them and should complete the following application form to be submitted to be considered at the same HDBE meeting. [Appendix 2 MAT application form](#).

Continuing to discuss options

The HDBE will keep an open approach to the development of the academy programme as the education landscape continues to develop and evolve. Opportunities to discuss specific and unique contexts for individual schools will be maintained. Being creative, within the clear parameters of the HDBE Strategy will be key to a successful future.

The HDBE will work proactively with the Regional Department for Education (DfE) Directors and office in strategic planning and determining academy proposals and arrangements within the Diocese.

HDBE Consent

HDBE consent will be required in respect of converter academies i.e. those not forced to become academies by the DfE, and this is not a formality. The HDBE will normally grant provisional and conditional consent to conversion to academy status, providing certain conditions are met: -

- ✓ the school consults the HDBE as soon as governors begin to discuss the process of academisation
- ✓ the Memorandum/Articles of Association of the Trust must be approved by the DBE
- ✓ the DBE, through DHET (Diocese of Hereford Educational Trust), becomes a corporate member of the Academy Trust and appoints the majority of members with the ability to appoint an appropriate number of directors
- ✓ the Academy Trust and the HDBE/ 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 Academy 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 Academy Trust must enter into a Master Funding Agreement with the Secretary of State in a form approved by the HDBE, and a Supplemental Funding Agreement for each academy based on the forms included in the Model Documents
- ✓ the school pays HDBE's/ Site Trustee legal fees and a fee for work carried out by DBE officers.
- ✓ where appropriate, a Members' Agreement applies (this commits the Members (i.e. legal owners of the Trust) to ensure the implementation of the Church of England objects of any Church of England school in the Trust)
- ✓ the HDBE are confident about the long-term sustainability or capacity of any proposed Trust
- ✓ the school and trust accept an agreed timeline to support either the stabilising of the trust or school finances and/or staffing structures, or where the HDBE require more time to consider the impact the MAT is having on standards and provision in the existing schools within the trust.

Due Diligence

The HDBE will carry out its own due diligence in respect of requests from Church of England schools to convert to academy status. The HDBE will consider all documentation provided by the school and trust as well as asking officers from The Education Team and the HDBE board to use their local knowledge and publicly available data and documentation. The HDBE may also seek a meeting with governors and or the Headteacher, and the Academy Trust in addition to the Application for Conditional Consent to Convert documentation being completed. (Appendix 1). This document is the undertaking that governors give to the Diocese that its conditions will be met.

Whilst church school-only multi-academy trusts are a sound way for Church of England schools to collaborate, this may not always be possible (or desirable), and the HDBE will therefore permit "mixed-mode" (church/community school multi-academy trusts) to follow the Church of England model articles and subject

to rigorous safeguards about religious character being written into the legal documents, in line with nationally agreed documentation and protocols. For some multi-academy trusts (especially “mixed mode” MATs), the HDBE may require a Members’ Agreement to be in place.

Under Performance & Sponsors

Where a Church of England school is underperforming and the DfE issue a Directive Academy Order, the HDBE will work with DfE colleagues to ensure that the school is placed in one of the three trusts agreed in this strategy. This process is outlined in the [Memorandum of Understanding](#) between the National Society (Church of England) and the DfE.

Disagreement

If there is a disagreement about the basis of the HDBE consent to an academy proposal, or if a Church of England school wishes to convert into an arrangement outside the HDBE policy (or outside arrangements envisaged by the Memorandum of Understanding between the National Society and DfE), then the governors proposing this can make an approach to the Hereford Diocesan Board of Education to discuss this. The HDBE may request that a written case is produced, and that the governors meet with representatives of the HDBE before a decision is made.

This policy was approved by the Diocese of Hereford Educational Trust and the Diocesan Board of Education on 20th December 2024.

This policy is due for review by the Diocese of Hereford Educational Trust and the Diocesan Board of Education in January 2026.