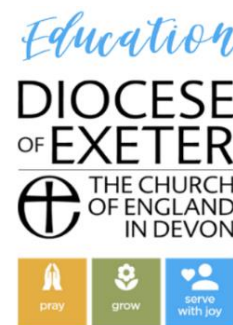


Exeter Diocesan Board of Education Committee

Multi-school Grouping Policy and

Guidance for Schools (October 2023)



To enable all, through the love of God in Jesus Christ, to 'live life in all its fullness' (John 10:10b)

Nurture vision-inspired education; **Nourish** personal and spiritual growth; **Enable** connected communities that flourish

Executive Summary and Contents

Section 1: Overview

The Exeter Diocesan Board of Education Committee (EDBE) has statutory responsibility for 134 Church of England Schools. This section set out the context of these schools. It states this guidance is to give clarity to school leaders, including those involved in governance, of the EDBE's expectations in relation to partnerships.

Section 2: The EDBE's position statement regarding partnership working

The EDBE recommends all schools should be working in a strong formal partnership or have a clear direction of travel to join such a partnership. Formal partnerships are defined as being part of an academy trust or a federation. Section 2 states the reasons for this and the expected timelines.

Section 3: Choosing a potential partner

The EDBE recognises the importance of choosing a strong and fruitful partnership so that your school(s) has every chance to flourish. This section provides guidance to help you think about your school's own context and the sort of questions you should be exploring when undertaking the required robust, evidence-based, due diligence. It helps you to think about how you can ensure any partnership information supplied or gathered is based on the current reality. The aim is to support you to openly consider what is in the best interests of your community whilst ensuring the Christian foundation of your school is secure for future generations.

Section 4: What formal partnerships are available?

The EDBE recognises formal partnerships as academy trusts and federations. This section provides an overview of these options. It also acknowledges that Management Partnerships may offer a time-limited option for schools and small groupings to work closely with another organisation before making a final decision.

Section 5: Conclusion

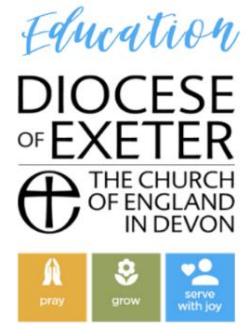
The EDBE aims to see all schools working in strong formal partnerships. This section summarises what any partnership must seek to secure so that the best opportunities are provided for our children and young people and the wider school community. It recognises that we can achieve much more together than we can as individual schools, in seeking to fulfil the Christian hope for lives and communities transformed and flourishing together, in the love of God.

Appendices

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Exeter Diocesan Board of Education

Multi-school Grouping Policy and Guidance for Schools (October 2023)



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Section 1: Overview

Diocesan Context

The Exeter Diocesan Board of Education Committee (EDBE) has statutory responsibility for 134 Church of England Schools and is committed to ensuring these are a vital and thriving part of our diocese both now and into the future. Our schools include small rural primaries with mixed aged classes; large urban schools; infant, junior and primary schools, some with nursery provision; and five secondary schools with two providing further education courses. These schools span three Local Authorities, four archdeaconries and twenty-five deaneries. We work closely with other dioceses and have schools within groupings which span our three neighbouring dioceses.

Currently 82% of our schools are in a formal partnership – either a federation or academy trust. Of those in formal partnerships, 71% are in an academy trust and 29% in a federation. 24 (18%) of our church schools currently stand-alone in no formal partnership, however 25% of these stand-alone schools have applied for and been granted an academy order to convert.

Rationale

The Exeter Diocesan Board of Education (EDBE) has written this guidance to provide clarity of the diocesan viewpoint for all church school leaders, including those involved in governance, in relation to partnerships. The aim is to guide schools in giving robust consideration to the future of their school community so that they are able to both deliver excellent education and ensure that every child, young person and adult within the diocesan family has every opportunity to flourish and fulfil their God-given potential.

The current political situation remains that there is an ambition for all schools to be part of strong academy trusts, however we recognise there is no legislation for this and that political positions can change. The Exeter Diocesan Board of Education Committee (EDBE) therefore make this recommendation based on what it believes to provide the best future for our Church of England schools and the children and young people who attend.

Who should read this guidance?

This guidance is for all school leaders, including those involved in governance. Sections are relevant to those who are working within the maintained school setting (maintained schools and federations) and those in academy trusts.

Section 2: The EDBE's position statement regarding partnership working

Position Statement

All schools should be working in strong formal partnerships or have a clear direction of travel to join such a partnership by the end of the 2025 calendar year. Formal partnerships are defined as being part of an academy trust or a federation. Please see sections 3 and 4 for more details about what constitutes a strong and sustainable partnership and about partnership options.

N.B.: Multi-school groupings should also regularly review their effectiveness (see appendix 2b) and be open to considering joining with other multi-school groupings so to add to their collective strength and provide the best educational opportunities to those we serve.

Why is the EDBE taking this position?

All of us are involved in education as we want to make a difference; to have a positive impact on the lives of children and young people; and to help shape a better society. This being the case, it is crucial to collaborate and be involved in a multi-school grouping that has the ability to share best practice, build expertise and widen the opportunities available to enable all involved in our schools to flourish.

Good formal partnerships are based on shared responsibility and the collective accountability to do the best for all children and schools within the partnership, and they increasingly contribute to improving the wider education system. By working together in a formal structure, schools have increased capacity and expertise to think pro-actively and strategically about key areas, such as school improvement, and jointly steer their schools towards the best outcome for their pupils, staff and communities. Partnerships offer support to school leaders to enable them to focus on their core purpose around teaching, learning and achievement, rather than having their attention diluted by other matters such as premises, finance or personnel tasks. Additionally, good formal partnerships provide resilience to schools, for example when the Headteacher leaves or there is a drop in pupil numbers, ensuring they can face the most challenging circumstances with minimal disruption to the running of the schools and ultimately to the children and young people's learning.

The evidence on strong formal partnerships indicates they support schools in being well-placed to respond to the ever-changing educational landscape and to keep abreast of the latest educational developments, research and policy changes. This is important in order to provide the best all-round education for a school and to ensure compliance of ever-changing and increasing expectations. Strategic governance is vital in securing high quality education and in overseeing the strategic direction of a school/multi-school grouping, in holding leaders/executive leaders to account for the outcomes of all pupils and in ensuring that the money is well spent. The governance board, in all organisations (stand-alone school or multi-school groupings), has huge responsibilities and governance roles require significant expertise and resource. Larger organisations can often attract individuals with particular expertise, skills and experience on to their governance boards, in addition to attracting the strongest teaching and leadership staff who see the potential for good career opportunities. The governance arrangements and structures associated with different formal partnerships can be found in section 4.

Please be assured that diocesan officers are here to help and offer support throughout the process of considering partnerships.

What are the expected timelines?

The EDBE is keen to support schools in their discussions and explorations, to ensure that schools are able to choose their future partners. In order to do this it is important that schools and small multi-school groupings consider their future in a robust and timely manner.

The expectation of the EDBE is that all stand-alone schools and small multi-school groupings take the following actions (see appendix 1).

- A review of the school/grouping (to compliment your SEF), for example using a Risk and Opportunity analysis (appendix 2a), to assess the strength and security of your school/grouping should you choose to retain your current structure.
- Agree at a full governance board meeting a small governance working group to relook at the academy trust and federation landscape and consider options, based on research and robust evidence.
- The governance working party should engage with the Diocesan Education Officers for support in establishing a long list/short list of potential partnership options to be explored further.
- The working group's research and discussions should be documented for later reference and reporting back to the full governance board.
- The working group report back to the full governance board. This should be minuted and the EDBE updated on further actions and decisions.
- A timeframe for actions is agreed between governance and the EDBE.

The EDBE expects the working group to work closely with diocesan officers and to make recommendations to the full governance board regarding any partnership options. All schools should aim to be working in a strong formal partnership or have a clear direction of travel to join such a partnership by the end of the calendar year 2025.

Please be aware that formal partnerships can take months or years to arrange, particularly where a church school converts to an academy. It is important that any partnership decisions are made with appropriate and transparent due diligence and that they meet with all legal requirements. Diocesan officers are well placed to support and guide you in all partnership discussions and explorations.

The governance board is expected to be pro-active in engaging with diocesan officers who will be happy to support your discussions.

Section 3: Choosing a potential partner

Who might be a suitable partner?

It is important to be open-minded in your consideration of partnership options and to seek the strongest and most fruitful partnership for your school community. This may involve putting aside previously held views about academy trusts or federations and focussing on what is important in ensuring the best possible outcome for the pupils/students in your school or grouping. It is recommended that your school or grouping's situation is considered against the backdrop of what has been progressed and achieved in the last 3 – 5 years, where you are currently (see appendix 2a), and what your vision is for the future. Through being honest in your self-evaluation and by understanding your own context well, research and explorations will be focussed. Previous perceptions, sometimes based on hearsay, can be pushed aside with potential partners considered on current merit and a firm evidence base.

Whilst schools coming together to form new groupings may be considered, it is important to consider the advantages gained through joining an established successful multi-school grouping that has clear systems for school improvement, where administrative support at all levels is well established, and where there is evidence of success in sustaining and enhancing church schools' Christian distinctiveness. The capacity of organisations is also important to consider - scale can give increased stability, resilience and sustainability for the future.

Some of our current multi-school groupings extend across our diocese and into neighbouring dioceses - these often work in a hub model so there are other schools to collaborate with in close proximity. We strongly advise against joining a multi-school grouping where there are no other schools in close proximity (maximum of 30 minutes travel time). This is because the benefits for staff and pupils/students of joint work will likely be eroded.

Things to consider when assessing the strength of a multi-school grouping

When considering the future direction of your school or grouping and potential partners, you should seek to understand the vision and culture of the organisation, and establish both what the partnership can offer for your community and what you can offer to the partnership. The following areas should be considered when assessing the strength of any grouping (see appendix 2b for a fuller explanation and sample assessment grid). You may find it helpful to consider how you know, for example, the triangulation of information presented by the leadership with evidence of what you see in practice and any information that is published or gained from the wider staff, pupils/students, or governance groups?

Vision and Ethos

- Does the multi-school grouping have a clearly stated and enacted vision which is understood by stakeholders and has synergy with your own school's / groupings' Christian vision? Does the grouping understand the Christian foundation of church schools and is it equipped to protect this and to develop the Christian distinctiveness and ethos?

High-Quality and Inclusive Education Culture

- Does the multi-school grouping create a culture in all its schools that is motivating and ambitious for all, including disadvantaged children and children with SEND, so that students can achieve their full potential?

School Improvement Culture

- Is there a culture of continuous improvement in the groupings' schools through self-evaluation, challenge, support and appropriate action?

Workforce Culture

- Is there a high-performing working culture for all staff that promotes collaboration, aspiration and support; that uses the flexibilities of the trust/federation structure to create opportunities for staff; and that recognises the critical value of high-quality teaching and champions the profession?

Finance and Operations Culture

- Does the multi-school grouping recognise the importance of effective and efficient use of resources for the benefit of all schools in the grouping and the wider education system?

Governance and Leadership Culture

- Does the Governance Board and executive leadership team anchor the trust/federation's strategy in the needs of its schools, the communities they serve and the wider educational system? Do the board and leadership team create a culture of ethical leadership, including the Seven Principles of Public Life?

In all partnerships there will need to be compromise. It is important to balance any perceived loss of autonomy with the strengths a partnership can bring. All school groupings are different. The above areas (expanded in appendix 2b) are found in the Trust Quality Descriptions (Department for Education, 6th July 2023) and are equally as pertinent to federations as to Academy Trusts. It is your due diligence that will ensure you find a good match so that you enter any arrangement as an equal partner, able to both contribute and benefit from the partnership.

What is in the best interest of your community?

Thorough investigation involving evidence-based research, visits to the organisation and schools, discussion with leaders and governors / directors, and conversations with the diocese are essential. Through undertaking these, you will be well placed to consider which potential partnerships are a good match for your school or grouping. Decisions should be made by evaluating the information gathered to transparently consider:

- What is in the best interests of children, young people and the wider community, and the rationale behind this.
- What is in the best interests of the staff and leadership in developing and sustaining great teaching and leadership.
- What you can bring to the partnership and share with other schools to help them to develop further.
- What you can gain from the partnership, specifically in relation to sustaining and improving educational outcomes, financial stability and the long-term sustainable future of your church school.
- How the Christian foundation, vision and distinctiveness of the school will be upheld and further developed?

It is recognised that not all multi-school groupings have strong systems or structures in place to ensure they are best placed to grow their grouping and provide the advantages to which schools should aspire. It is also recognised that each grouping is different and that some will have a vision and values that are more aligned to your school or grouping than others. Your authentic investigations and robust due diligence are essential.

All organisations considering joining or changing a partnership are requested to contact the Diocesan Education Team early in their thinking so that options can be discussed, the integrity of the process upheld, and any decision-making supported. Whilst the governance board ultimately make the decision about partnerships, please note the EDBE is required to give approval for Church school organisational changes.

Ensure information and evidence collected (and shared) is an authentic reflection of reality

Entering or changing any partnership is an important decision. It is vital that both sides are open and honest. Potential partners will clearly want to present themselves well and highlight what they have to offer or bring to a partnership. Your honesty and integrity in ensuring you present your school or grouping fairly is essential as is your due diligence to ensure any potential partner does the same. In your investigations you must dig deeply to collate a rich range of evidence from a variety of sources. The triangulation of evidence will help you ensure that the perception of respondents matches the reality of what is happening on the ground in schools.

The EDBE offers diocesan officers to support your school, and specifically your working group, with expert guidance to ensure your due diligence is robust and based on a solid evidence base. Officers are also able to connect you to other system leaders who may be able to advise and/or support your investigations.

Does the EDBE place any restrictions as to potential partners?

Yes. The EDBE has a responsibility to ensure children and young people have every opportunity to fulfil their God-given potential and to protect the Christian foundation of schools. This builds on over 200 years of heritage and seeks to ensure church schools can effectively serve future generations.

The EDBE expects certain governance arrangements depending on whether you are a Voluntary Aided (VA) or Voluntary Controlled (VC) school, or have majority or minority foundation governance, so that the Christian foundation of church schools is preserved in line with your current designation. See section 4 for more details. The governance board must understand any possible unintended consequences of their decisions.

Diocesan officers are available to discuss your thoughts and offer support.

Section 4: What formal partnerships are available?

Academy Trusts

Academy trusts exist in order to advance education for public benefit. This purpose is cemented in the academy trust's Articles of Association. Our church schools can only join an academy trust which has Church Articles as these ensure the education is 'conducted in accordance with the principles, practices and tenets of the Church of England both generally and in particular in relation to arranging for religious education and daily acts of worship.' Academy trusts are required to recognise and support schools' individual vision and ethos. Increasingly Academy trusts are referred to as civic organisations which not only act within the educational system but that act upon it helping to place children, young people and families at the heart of a coherent public services offer.

In the Diocese of Exeter, Church Articles of Association are either Majority Church Articles or Minority Church Articles. Majority Articles have a majority of foundation governance appointed to the board of directors (sometimes known as trustees). In addition, there will be a majority of foundation representation at member level. Members oversee the directors' running of the academy trust and hold them to account for its performance. Individual schools may also have a local governance committee which should reflect their former category as a VA or VC school for foundation governance representation. Some academy trusts now operate hub governance at a local level. Hub governance does not always reflect the school's former category however the Christian foundation is still protected at director and member levels. All schools, church (VA and VC) and community, are able to join academy trusts with Majority Church Articles. Academy trusts with Minority Church Articles have minority foundation governance and therefore are a suitable home for Voluntary Controlled (VC) church schools and community schools only, unless there are exceptional circumstances agreed by the EDDB when there is no other academy trust option available.

Academy trusts are charitable companies, with specific expertise in education, contracted through funding agreements with the Department for Education (DfE) and the Education and Skills Funding Agency (ESFA) to advance education for the public benefit. Academy trusts are regulated by the DfE, subject to summary evaluations by Ofsted and independent financial audits. Church schools continue to be inspected under the Statutory Inspection of Anglican and Methodist Schools (SIAMS) framework.

It is important to understand that an academy trust is a corporate legal entity with responsibility for the success of every school within the academy trust and for advancing education for public benefit. To fulfil this responsibility there needs to be strong collaboration and cooperation. As a legal entity, an academy trust's success rests on the success of the whole organisation so all schools are supported to be effective with the aim of delivering high quality education and to ensure that no school fails. Strong governance expertise and resource, particularly at director level, is essential to hold executive leaders to account for the performance of the academy trust.

'Building Strong Academy Trusts' (DfE, May 2021) notes that governance is one of the defining characteristics of academy trusts. By operating under a single governance structure, a strong board of academy directors can effectively oversee the strategic direction of the academy trust and hold executive leaders to account for the outcomes of all pupils within the academy trust. This structure goes much further in promoting shared practice than other collaborative structures such as federations or alliances. Academy trusts are structured to enable local governance representation for individual schools or a small geographical hub of schools. This means the local identity and distinctive ethos of individual schools is retained and monitored by local governance who will have clearly delegated responsibilities from the board of directors. If there is a significant number of schools, perhaps with a geographical spread, local governance is particularly important to help ensure schools remain rooted in their local community whilst benefitting from the additional capacity and specialist expertise of a larger organisation.

Not all academy trusts are the same however if chosen well to be a good match for your school(s) the permanence of a Academy Trust partnership will secure your school's long-term sustainable future. Robust due diligence is however vital. Entering a time-limited Management Partnership, or Service Level Agreement (DfE, April 2021), may allow your organisations to work in close collaboration before making a final decision (appendix 4).

Federations

A federation is a maintained school structure where a number of schools come together under a single governance board which is the accountable body for all the schools and sets the strategic direction for all schools in the federation. The Local Authority statutory responsibilities will remain the same. If a school decides to join or form a federation, there is a statutory process set down in Federation Regulations that must be followed.

The School Governance (Constitution) Regulations 2012 state federations comprising only of:

- Voluntary Controlled schools must have at least two foundation governors, but no more than a quarter of the governing board.
- Comprising of all Voluntary Aided schools must have such number of foundation governors to outnumber all the other governors by up to two.

Where there is a mix of schools the requirements are:

- Voluntary Controlled and community, community special or maintained nursery schools must have at least one foundation governor.
- A governing body that consists of more than one category that includes at least one foundation, foundation special or Voluntary Aided school must have at least two foundation governors.

In making a decision to join a mixed federation, governors must be aware that the number of foundation governors can be diluted, and this potentially puts at risk the protection of the Christian foundation of the church schools. When schools federate there is a legal requirement for one governing board to be formed. Whilst the current board members may well be committed to upholding the Christian vision, values and ethos of the school, there is no guarantee that future governors will act in the same way. The unintended consequence could be that the future of the school as a church school is put in jeopardy. It is therefore expected that governors will explore all options robustly and will not seek to enter a partnership which will result in a dilution of foundation governance representation. Governors will need to seek approval from the EDBE, which will not be granted without compelling reasons and no other identifiable options being available.

A federation should be viewed as a long-term commitment to a family of schools, however it is possible to leave a federation through a statutory process, or for federations to convert its schools to academies. Strong federations come together to increase capacity to improve the educational provision for their community. Federations differ and the capacity to work together across schools effectively varies significantly depending on the geography, size and structure. If considering this type of partnership to secure your school's long-term sustainable future you must undertake robust evaluations of how it will improve outcomes for your community and what you can offer to the wider educational landscape, and compare this with Academy Trust options. Entering a time-limited Management Partnership may allow your organisations to work in close collaboration before making a final decision.

Governors must be aware that decisions regarding the future steps for all schools within a federation grouping, including academisation, would be taken by the newly formed governing board following the organisational change. In undertaking your due diligence it is important to explore questions with any federation regarding their views and thoughts on future growth or academisation. We advise serious consideration and due diligence of the various Academy Trust options (see appendix 3).

Other partnerships

The EDBE recognises formal partnerships as academy trusts and federations. There may however be a valid purpose to entering a Management Partnership as these offer a time-limited option for schools and small school groupings to work closely with another organisation before making a final decision to formally partner. Whilst we are happy to support these arrangements they should not be viewed as a long-term solution. If you are interested in a Management Partnership, please engage with the diocese early.

All collaboration is viewed as positive however it is important to distinguish between working with neighbouring schools and stakeholders informally and entering a formal structure where there is shared responsibility and accountability. Informal collaborations are often based around a specific project or on personalities, therefore when a project is complete or when there is a change in leadership the collaboration ceases. There is increasing evidence that formal partnerships have the greatest impact on improving schools and therefore the educational provision for all within our communities (see appendix 4).

Section 5: Conclusion

The EDBE believe there is merit in all schools belonging to a strong formal partnership and as such recommend school leaders, including those involved in governance, seek a suitable strong partner to secure the school or grouping's long-term sustainability and to share strength across the system as together we seek to 'serve the common good'.

Any partnership must seek to secure:

- The long-term future of your school, preserving your unique Christian foundation and vision and rich educational heritage for generations of children to come.
- A school that is flourishing within the local community and its mission community, serving the unique needs of its children, young people and locality.
- Excellent leadership, that seeks the best for children and young people, and values and develops staff.
- Teaching and learning with strong educational outcomes, enabling life in all its fullness.
- A stable and sustainable three-year financial forecast within a financial framework that evidences long term viability.
- A strong and skilled governance board and structure that can effectively oversee the strategic direction of all the schools and hold executive leaders to account for the outcomes of all pupils.

Officers of the EDBE (appendix 6) are experienced in partnership working and school organisation changes and will support, guide and challenge you to make the best decision for your school or grouping. The research and investigation into options must be transparent, undertaken with integrity and authenticity, and demonstrate robust due diligence so that decisions are based on the lived reality of what all partners can bring to a partnership. All school leaders, and specifically those involved in governance, should focus on securing the strongest possible partnership match to secure their school(s)' sustainable future.

Whilst it might be tempting to dismiss talk about partnership options as a distraction from the real business, the EDBE believe all schools should be part of a strong multi-school grouping. There is growing evidence that Academy Trusts in particular have a structure that 'facilitates vital capacity; the capacity to educate, to improve schools, and to weather external shocks.' (Confederation of School Trusts, Trust Journal, May 2021). Officers and the DBE recognise this is a contentious issue and will seek to ensure all dialogue is carried out with respect and in a manner that reflects the Christian foundation and values in our schools.

As the leaders of education we are all concerned with providing the best opportunities for our children and young people and the opportunities that arise from formal collaborations are considerable. We can achieve much more together than we can as individual schools, in seeking to fulfil the Christian hope for lives and communities transformed and flourishing together, in the love of God.

Appendix 1: Suggested timeline for actions

All schools should aim to be working in a strong formal partnership or have a clear direction of travel to join such a partnership by the end of the calendar year 2025. The steps below are provided to help your school or grouping to navigate the process of explorations. It is intended that you will add your own timescales to shape your thorough investigations and ensure any decisions are made based on a robust understanding of what makes a strong partnership. Some of the steps may happen concurrently. It is important that you consider all options to enable you to find the strongest match to your own school's vision, and for its sustainable future.

Diocesan officers are happy to support you in your thinking and explorations. Please keep in regular contact.

Date	Action by whom?	Action
October 2023	EDBE	Re-issue of updated Multi-school Grouping Policy and Guidance for Schools.
	Chair of governance / clerk or governance professional	Ensure all governors/directors are aware of the EDBE's Multi-School Grouping Policy and Guidance for Schools, specifically the recommendation that all schools should be working in strong formal partnerships or have a clear direction of travel to join such a partnership by the end of the 2025 calendar year.
	Governance	Undertake a review of your school/grouping (to complement your SEF), for example using a Risk and Opportunity analysis (appendix 2a), to assess the strength and security of your school/grouping should you choose to retain your current structure. This honest analysis should be considered jointly by the working group and school leaders and will need to be discussed and revisited over more than one session.
Possibly spring term 2024 and ongoing	Governance board	Identify (and record) what might be the essential requirements and characteristics of a strong partnership for your school. Agree at a full governance board meeting a small governance working group to relook at the academy trust and federation landscape and consider options, based on research and robust evidence.
	Working party	Working group undertake explorations and liaise with diocesan officers to ensure time is used effectively to investigate those options which will be permissible and that provide synergy with your school(s) vision. Your due diligence must be robust and based on secure evidence. A long-list of options to explore should be created. <i>NB. Both the working group and the governance board discussions should be minuted.</i>
	Working party / governance board	The working group should report back and lead appropriate discussions at full governance board meetings so that the whole process is undertaken with transparency and integrity. This should include a review of work undertaken and findings to date, and ensure earlier analysis and requirements are still reflective of the school's or grouping's current position. A shortlist of options should be agreed.
	Working groups / governance board	Undertake to get to know any potential partners more deeply to really understand how they work and function together to achieve the best for all schools, and the children / young people within them. Ensure you listen to any presentation or information a potential partner might provide <u>and</u> test statements and assurances to ensure the perception matches reality on the ground in schools. Diocesan officers are available to support you in your robust due diligence.
	Working groups / governance board	A clear direction of travel should be recommended by the working party and agreement reached by the governance board. The working party must continue to engage with diocesan officers so that an agreed, bespoke and timed plan can be put in place. Diocesan officers work with schools and school groupings to guide and support them with the compliance and legal processes necessary when joining a formal partnership.
December 2025		School(s) are a member of a strong multi-school grouping, or working towards this.

N.B: Diocesan Officers are here to work with schools and are pleased to offer and provide support to school leaders and governance boards exploring their school's or grouping's sustainable future and potential partnership options. If you require a listening ear, a sounding board or specific support and guidance we are happy to provide this.

Please engage with us early and use the considerable experience and expertise that is within the Diocese of Exeter's Education Team gathered from working across numerous federations and Trusts, and from interacting with national colleagues and system leaders, over a number of years. Like you, we want the best for each of our school communities and recognise the importance of individual schools' vision and ethos. Any partnership entered into must be done so with eyes open and a full understanding of benefits and any compromises. In all cases benefits should significantly outweigh compromises. There are lots of choices available and through our support and challenge we aim to help you choose a strong partnership match to enhance your school and its work.

Appendix 2a: Risk and opportunities analysis

An honest assessment of the school's current situation is essential to help inform any decisions about the future. An initial analysis should focus on the current situation, and not on future plans or aspirations. This needs to be given appropriate time and be revisited regularly. It should not be delegated to an individual. The questions below are aimed to guide you, however, please add to this in assessing **'How secure is the future of the church school(s) if retaining the current structure?'**

Focus area: How secure is the future of the church school(s) if retaining the current structure? (maintained stand-alone / federation, SAT or MAT)			
Strengths	Weaknesses	Opportunities	Threats
<p>Effectiveness of the school(s) and its reputation: Have you evaluated the school(s) against both the Ofsted and SIAMS frameworks? Do you assess the school(s) as securely good? Is this evidenced against the Ofsted Education Inspection Framework and the SIAMS Framework? How does the achievement (progress and attainment) of pupils/students compare with national levels? What is the achievement of pupil /student groups? What evidenced impact demonstrates the school / grouping has been able to secure improvements over the last 2-3 years? What external reviews feed into your evaluations and assessments? Are you responsive to the expert advice of others?</p> <p>Is the school(s) full? Are parents confident in the school? Are there regular complaints? What is the impact of these on staff capacity and parental perceptions? Does the school have a good reputation and standing in the local community? How do you know? What do numbers look like in future years? Are there enough children in the catchment or are you attracting people from a wider area? Can the school sustain the current (or a desired) class structure? Is this attractive to parents and effective for teaching and learning? Is the school(s) attracting and retaining strong staff? Do staff see the opportunities for their continued professional development and career pathways? Are there opportunities to share best practice and for innovation? Is there access to specialist provision within your structure? Do you have the skills, experience and abilities for succession planning?</p>		<p>Would governors / inspection outcomes judge you as securely good? What happens if they do / don't? Do governors have the skills and knowledge to hold leaders to account? How deeply do governors understand the effectiveness of the school? Could decisions about the future direction of your school be taken from you? What would happen if your Head was absent long-term? From where can you draw leadership expertise? Are you overly reliant on individuals? Are staff keeping up to date with the latest education developments? How are they using their expertise? Is there sufficient capacity for school improvement? If so can you evidence this? Would you know if your school(s) education offering was standing still? What is the school's reputation?</p> <p>How will pupil numbers impact finances? Will there be sufficient funds to ensure strong educational provision? If cuts are made to provision/number of classes, how will this impact the reputation? Are the finances robust enough to ensure there are enough skilled staff to support pupils / students well, and to provide interventions/additional support? What is the impact on reputation and staff/student/pupil wellbeing if children's needs are not met effectively? Is your external support (LA/federation/MAT/informal grouping) helping you to problem solve effectively to improve provision? Are you able to develop, attract and retain leaders which can enhance provision? If so, how are you using these and if not, what can you do to rectify?</p>	

Strengths	Weaknesses	Opportunities	Threats

Appendix 2b: Things to consider when investigating the strength of a multi-school grouping and who might be a strong partner.

Name of partner being investigated:		
Headline Summary Notes		
Vision and Ethos	<ul style="list-style-type: none"> • Culture and Context: Creates a culture in which all schools can confidently articulate who they are, what they are doing here and how then they live and learn together. Stakeholders feel genuinely engaged. There is a culture of high aspirations for all. • Vision: Enables all schools to express their own individual vision and ethos, and in church schools to live out their Christian theologically rooted vision, valuing each for its own identity but as an important part of the whole. The academy trust/federation has a clear and known vision that has synergy with individual school visions. • Strategy: The overall grouping and individual schools' strategy is inspired by their vision and this is evident in its outworking. It enables all pupils and adults to flourish. • Collective Worship (CW): All schools should meet statutory requirements. Church schools will follow the Church of England (CofE) CW guidance which encourages schools to reflect on their practice and to ensure that CW remains the relevant and essential component of an education that enables all pupils to flourish and to 'live life in all its fullness' John 10:10. • Christian Foundation: Leaders, including governance, respect and value the contribution of church schools and ensure their Christian Foundation is upheld and developed. They work closely with the diocese and local churches to nurture spiritual growth and provide pathways for those who wish to explore their own faith. 	

<p style="writing-mode: vertical-rl; transform: rotate(180deg);">High Quality and Inclusive Education</p>	<ul style="list-style-type: none"> • Culture: Creates a culture in all its schools that is motivating and ambitious for all, including disadvantaged children and children with SEND, so that students can achieve their full potential. • Curriculum: Oversees the design and implementation of ambitious, broad, well-sequenced and knowledge-rich curricula in all of its schools, and in church schools reflects the schools' individual theologically rooted Christian vision. Religious Education and Worldview are well taught and given appropriate importance. • Student Outcomes: Achieves good outcomes for all its students by delivering education that is both high-quality and inclusive. • Accessible to all: Operates fair access. Welcomes and effectively teaches disadvantaged children and children with SEND from their local areas, and ensures all are treated well. • Inclusive pastoral support: Supports students and schools to address issues so students can stay in mainstream school where possible. • Enrichment: Enables children to take part in sport, music and cultural opportunities that enrich the curricula and support wider development. There is an active culture of justice and responsibility. • Behaviour & attendance: Ensures its schools are places where all students attend regularly, are kept safe, feel calm and supported, and are able to actively participate and progress. • Destinations: Ensures all children leave its schools well prepared for the next stage of education, employment or training and prepared to become confident citizens. • Collaboration: Works collaboratively with schools, trusts, LAs, dioceses, churches, parents and other civic partners to ensure the delivery of statutory functions and acts in the wider interests of the local community. 	
<p style="writing-mode: vertical-rl; transform: rotate(180deg);">School Improvement</p>	<ul style="list-style-type: none"> • Culture: Creates a culture of continuous improvement in its schools through self-evaluation, challenge, support and appropriate action, supported and driven by the school's / groupings vision. • School improvement model: Has a clearly defined and effective strategy to improve and maintain the performance of schools that are already part of the grouping, as well as those that join. • Christian Distinctiveness: The trust/federation support church schools in considering how effective is the school's distinctive Christian vision, established and promoted by leadership at all levels, in enabling pupils and adults to flourish. • Transformation: Takes on challenging schools and transforms previously underperforming schools by delivering broad and sustainable improvement. • System-led improvement: Supports the wider system in sharing best practice; helps underperforming schools to improve; and contributes to building a self-improving system. 	

<p style="text-align: center; writing-mode: vertical-rl; transform: rotate(180deg);">Workforce</p>	<ul style="list-style-type: none"> • Culture: Creates a high-performing working culture for all staff that promotes collaboration, aspiration, support and enables all to flourish. Uses the flexibilities of the trust/federation structure to create opportunities for staff. Recognises the critical value of high-quality teaching and champions the profession. • Workload: Fosters a supportive working environment by managing workload, prioritising wellbeing and taking action to support all staff. • Retention: Supports the retention of great staff both within the individual trust/federation and across the school system. • Working environment: Prioritises effective behaviour and attendance policies to create a safe environment in which to work and learn. Utilises the grouping structure so that staff are empowered to deliver their best. • Developing new and early career teachers: Makes a positive contribution to the wider system by delivering high-quality training and/or placements for trainee teachers, and supports ECTs through the Early Career Framework. • Continuing Professional Development: Encourages and enables all staff to build their expertise through evidence-based professional development and mentoring. • Collaboration: Builds an innovative and vibrant community of professionals, collaborating across schools, the diocese, churches and other trusts/federations to develop and share expertise and evidence-based practice. • Line management & career progression: Ensures every member of staff is effectively line managed to maintain high performance, and career progression is encouraged. • Equality, diversity, inclusion: Ensures inclusive working environments, and takes action to promote equality and diversity. 	
<p style="text-align: center; writing-mode: vertical-rl; transform: rotate(180deg);">Finance and Operations</p>	<ul style="list-style-type: none"> • Culture: Recognises importance of effective and efficient use of resources for the benefit of all schools in the grouping and wider education system. • Financial Strategy: Uses financial data and intelligence to set a stable, accurate and sustainable long-term financial strategy for the trust/federation. Has a clear approach to delivering value for money through effective budgeting and risk management. • Resource allocation: Demonstrates efficient and effective use of resources, for example through school and trust/federation resource management benchmarking tools and Integrated Curriculum and Financial Planning. • Capital strategy: Maintains and invests sustainably in the capital infrastructure, including buildings, digital infrastructure and technology. • Reserves: Operates a well-planned reserves policy that provides sufficient contingency for cashflow and unplanned, urgent expenditure and aligns resources to expenditure priorities across all its schools. • Financial information management: Has strong financial and information management systems with effective oversight, for example ensuring data compliance and having policies and processes in place to minimise risk of fraud, data breaches and financial mismanagement. 	

Governance and Leadership

- **Culture:** The Board and executive leadership team anchor the trust/federation's strategy in the needs of its schools, the communities they serve and the wider educational system.
- **Governance of the Trust/Federation:** Ensures the Board is made up of directors /governors with the necessary expertise to fulfil its functions effectively and uphold the Christian foundation and distinctiveness of church schools.
- **Strategy:** Chair leads the Board to set and champion a clear strategy for the trust/federation, which aligns with these quality descriptions and sets out aspirations for growth and rigorously reviews progress. The Chief Executive Officer (CEO)/Executive Head (EH) leads the executive leadership team (ELT) to create and implement an effective operating model with clarity about the delivery of trust/federation-level and school-level activities, that aligns with the strategy and, with the ELT, reviews progress rigorously.
- **Executive Leadership:** The Board ensures high-quality executive leadership through appointing its CEO/Executive Head and providing effective support and challenge to them and the ELT whilst maintaining sufficient independence to allow scrutiny of performance. The CEO/EH leads a high-performing ELT. Succession planning is considered by building a leadership pipeline.
- **Accountability:** The Board holds the ELT to account for the effective implementation of the strategy and operating plan, including in relation to the use of resources and the drivers of impact. It assures itself of the integrity of financial information; that there are robust risk controls and risk management systems; and there is compliance with regulatory, contractual, and statutory requirements, including safeguarding. The Board and CEO/EH agree metrics and process by which progress will be assessed.
- **Non-executive leadership:** The Board ensures a high performing governance structure where trustees and other non-executive leaders have the expertise to fulfil their functions effectively; accesses independent insight from internal and external audits, reviews of governance arrangements and other expert advice; provides board induction, training and review; and supports effective succession planning by building a pipeline of future governance members, with a focus on promoting diversity of thought and experience. The CEO/EH supports the trustees and other non-executive leaders to meet their duties, working to ensure operational compliance and fulfilment of all statutory responsibilities.
- **Engagement:** The Board oversees strategic relationships with external stakeholders. The CEO/EH communicates strategy, plans and achievements to stakeholders. Both the ELT and Board involve the diocese, parents, schools and communities so that decision-making is supported by meaningful engagement.

N.B.: Quality Descriptions based on Annex A - Trust Quality Descriptions (DfE 6th July 2023)

Appendix 3: MATs with Church School Articles in the Diocese of Exeter

The EDBE expects certain governance arrangements depending on whether you are a Voluntary Aided (VA) or Voluntary Controlled (VC) school, or have majority or minority foundation governance, so that the Christian foundation of church schools is preserved in line with your current designation. See section 4 for more details.

The following table lists MATs within the Diocese of Exeter which have Church School Articles. It indicates whether the Trust has Majority Articles, which allows all schools to potentially join, or Minority Articles (or 50/50 Articles) which means that the MAT is only suitable (based on governance arrangements) for schools with a voluntary controlled or community designation.

	Church school Articles	No of schools	Plymouth	Exeter	Torbay	South Hams	Torrige & West Devon	East Devon	Mid Devon	North Devon	Teignbridge	Cross Diocese
Academies for Character and Excellence	Majority	9										
Acorn Multi Academy Trust	Majority	7										
Alumnis Multi Academy Trust	Majority	9										
An Daras Multi Academy Trust	Minority	8										
Athena Learning Trust	Minority	6										
Chulmleigh Academy Trust	Majority	4										
Dartmoor Multi Academy Trust	Minority	18										
The First Federation Trust	Majority	20										
Learning Academy Partnership South West	Majority	16										
Link Academy Trust	Majority	17										
Ivy Education Trust	Minority	8										
Redstart Learning Partnership	50/50*	10										
St Christophers CofE Primary Multi Academy Trust	Majority	19										
St Christophers CofE Secondary Multi Academy Trust	Majority	1										
Tarka Learning Partnership	Minority	8										
TEAM Multi Academy Trust	Majority	6										
The Ted Wragg Multi Academy Trust	Minority	15										
Ventrus Limited	Majority	16										

Numbers in brackets indicate a current Management Partnership - accurate as of 1st September 2023

Appendix 4: Useful reading

Context and Research:

Joining a School Trust: Guidance for Schools: CST/Stone King June 2022

[Joining-a-School-Trust-June-2022.pdf](#)

What is a strong Trust? A CST discussion paper: CST 2022

[ICE 10102 CST What Is A Strong Trust Discussion Paper \(1\).pdf](#)

Trust partnerships: guidance for academy trusts and prospective joiners: DfE October 2021

[DfE master statutory guidance template \(publishing.service.gov.uk\)](#)

Building Strong Academy Trusts: Guidance for Academy Converters: DfE May 2021

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/987336/Building_strong_academy_trusts_guidance.pdf

The government's vision is for every school to be part of a family of schools in strong academy trusts.

MAT School Improvement Assurance Framework: DfE Website May 2021

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/987340/MAT_Assurance_Framework.pdf

This document outlines six areas in which a MAT can self-evaluate their current capacity. It will also help to evaluate their capacity to support more schools. It is a useful tool for MATs and federations, but also for maintained schools to consider when thinking about their strategic decision making.

Academy Trust Handbook 2023

[Academy Trust Handbook - Academy Trust Handbook 2023 - Guidance - GOV.UK \(www.gov.uk\)](#)

Annex A - Trust Quality Descriptions: DfE July 2023

[Annex A - Trust Quality Descriptions \(publishing.service.gov.uk\)](#)

Sustainable improvement in multi-school groups: DfE and Government Social Research (GSR) Dec 2018

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/917070/School_Improvement_in_Multi-School_groups_-_FINAL_10122018.pdf

Research into Multi-school groupings

The trust in testing times: the role of the multi-academy trust during the pandemic: Ofsted 2021

<https://educationinspection.blog.gov.uk/2021/01/19/the-Trust-in-testing-times-the-role-of-multi-academy-trusts-during-the-pandemic/>

Leaders in schools that were part of multi-academy trusts (MATs) told us that the support they received from their trust was invaluable. Research findings show how important this can be to schools' resilience in the most challenging of circumstances, and how being part of a greater whole builds that resilience.

Open Academies and Academy Projects website.

<https://www.gov.uk/government/publications/open-academies-and-academy-projects-in-development>

This gives the national picture of the position of maintained schools, free schools and academies. Please see the summary tab of the spreadsheet.

Choosing a Potential Partner

Trust Partnerships: Guidance for academy trust and prospective converters: DfE May 2021

<https://www.gov.uk/government/publications/multi-academy-trusts-establishing-and-developing-your-trust>

These documents set out and provide guidance on what trust partnerships are and how they work. They provide examples of trusts and schools that have worked together.

Federations

Legislation

The School Governance (Federations) (England) Regulations 2012: No 135

<https://www.legislation.gov.uk/uksi/2012/1035/contents/made/data.pdf>

The School Governance (Federations) (England) (Amendment) Regulations 2015: No 1554

https://www.legislation.gov.uk/uksi/2015/1554/pdfs/uksi_20151554_en.pdf

Guidance

Federations: guidance on the governance DfE Updated Sept 2022

[Federations: guidance on the governance processes - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/publications/federations-guidance-on-the-governance-processes)

Other Partnerships

These documents explore Trust Partnerships. The first document explains how the time limited arrangement allows schools to partner with an academy trust so to benefit from trialling membership with the view is to explore how a permanent and fuller membership might work. It provides information and case studies on how the Service Level Agreement (SLA) could work. Exeter Diocese also has a wealth of information on 'Management Partnerships' which work in a similar way. The second document provides an example contract. Again, the Diocese of Exeter have sample documents that can be utilised. Diocesan officers can support and guide you in preparing an agreement document.

Trust Partnerships: Guidance for academy trust and prospective converters: DfE May 2021

<https://www.gov.uk/government/publications/multi-academy-trusts-establishing-and-developing-your-trust>

Trust Partnership Service Level Agreements – for adaptation by schools and trusts DfE April 2021

<https://www.gov.uk/government/publications/multi-academy-trusts-establishing-and-developing-your-trust>

Management Partnership Contract – Diocese of Exeter and associated parties

We will be happy to share this with you – please ask by emailing education@exeter.anglican.org

Appendix 5: Frequently asked questions

What is a strong partnership?

A strong partnership is one that enhances the capacity of leadership and effectiveness of your educational provision. It has shared governance and accountability and strong governance structures. See sections 3 and 4 for more details.

What do you call a small grouping?

Providing leadership is strong, the effectiveness of an organisation should be enhanced when capacity increases. We are particularly concerned that some small federations see a decrease in the capacity of leadership as one Headteacher becomes shared across two, three or four small schools as a cost saving exercise. In this scenario, small partnerships can hamper school effectiveness. It is necessary to look at the evidenced track record of a grouping to see what it has achieved, rather than rule an organisation in or out on size alone.

What happens if a school's governance board is not pro-active in engaging with diocesan officers?

Diocesan officers will review contact and seek to overcome any barriers to engagement. Every effort will be made to listen to schools and to respond to their individual context and concerns. Ultimately, diocesan officers, school leaders and governance individuals all want to secure the strongest future for our school communities - there is much common ground from which to build.

Can and will the DfE force every school into an Academy Trust? They've u-turned before on the Academy agenda.

No, the DfE have not legislated for all schools to become Academies. Financial incentives are however available to help MATs grow. There will be no DfE financial incentives for federations. Whilst the EDBE recognises not everyone is in the position where they wish to join a MAT, it does believe in formal partnerships and is recommending all schools join a strong multi-school grouping.

Is Exeter Diocesan Board of Education Committee (EDBE) really open to federations as a model or are they really promoting Academy Trusts?

The EDBE is recommending schools / groupings are within a strong formal partnership with shared accountability through governance. This could be an academy trust or a federation - the emphasis is on 'strong'. It is important to note that any partnership entered must protect the Christian foundation of the school and therefore must not result in diluted governance. The regulations for federations do not offer this protection in the same way as Academy Trusts. Some federations currently have governance proportions which are proportionally diluted from their schools' voluntary status. Where federations have new proposed joiners, the federation governance must be representative of the joining school's current governance unless there are exceptional reasons and no other options. This does potentially limit the number of suitable federations available. We are not pushing federations as a preferred grouping but instead simply leaving them open as an option as there may be some instance where this is the best partnership option. A strong partnership which protects the Christian foundation of church schools and essentially secures excellent outcomes for children / young people is more important to us than whether it is with an Academy Trust or a federation.

Does the diocese have any teeth where a school refuses to engage in partnership discussions with other schools or the education team?

We don't want to use our 'teeth' preferring instead to come to a mutual understanding about what is in the best interest of each school. However, the Diocesan Board of Education (DBE) Measure 2021 does enable the diocese to give direction to a governing body if the EDBE is satisfied that the governing body 'is accordingly acting in a manner which is not in the interests of the school or of church schools generally'. If information is not forthcoming, the EDBE for a diocese may require the governing body to provide information to assist the EDBE in carrying out its functions.'

Will our ethos be diluted if we join a MAT or a federation?

Federations have one governing board across all schools. Local governance at an individual school level disappears in a federation. Majority foundation governance is not protected which is a significant concern. These factors mean the ethos of your school may be 'diluted', particularly when staff or governors change. MATs on the other hand can have local governance boards who retain some local oversight and feed into the board of directors. In MATs the Christian foundation of the school is protected whether your designation is/was VA or VC as the Articles of Association ensure the appropriate majority or minority governance arrangements (see section 4). The Articles of Association is a legal document that also states the MAT must, 'recognise and support their (Academy's) individual ethos'. This is cemented in law.

Will we lose our autonomy?

The degree to which you keep your autonomy will depend on your chosen partner and will be established through your robust due diligence. It is not dependent on whether you choose a MAT or a federation but on the individual organisation. During your investigations consider where you might wish to keep autonomy, for example regarding curriculum choices, and where there will be advantages in working together, for example on assessment processes and some specific policies. All organisations are different.

We are a successful stand-alone school and don't need to join a grouping, so why would we?

Joining a multi-school grouping is about both giving and receiving and should be viewed as equal partnership. If you are a strong school, your expertise could benefit a wider group of children and young people. It could also give your staff improved career pathways so they are not lost from your school altogether. Being part of a multi-school grouping also gives a school resilience – if key personnel were to leave your successful school for how long could it retain its strength? Capacity should always be increased in a good partnership and practically all schools have an area which would benefit from further development or resource. Partnership options might enable new innovation, greater SEND support or improved provision, or simply the opportunity to spread good practice to benefit a wider or more diverse range of pupils / students.

We are a successful small federation and don't need to join a grouping, so why would we?

As above. If you are genuinely successful with, for example strong school improvement systems, you could consider coming alongside others in partnership to either merge or expand your grouping. Your expertise could help 'serve the common good'.

Why is a formal financially binding partnership the best way of collaborating?

It will only be the 'best way' of collaborating if you choose your partners wisely and have a full understanding of how accountability arrangements work. Finances whilst important are just one part of this and will be organised in different ways depending on the organisation. It is true that MATs attract different and seemingly increasingly generous funding streams so this may open up new opportunities. It is however the opportunities and benefits, such as increased expertise and focus on school improvement; staff recruitment, training and retention; shared resourcing; and increased resilience, which make formal partnerships worthy of serious consideration. The shared governance structure and the joint accountability ensure all are working toward the same goal and pull together, however difficult the circumstances, to ensure all schools flourish.

Appendix 6: Contact details

Diocesan officers are here to support you and your schools. If you have a general enquiry, would like to discuss anything or require a consultation or meeting, do get in touch.

Not sure to whom you should speak?

In the first instance, please contact Debbie by email on governance@exeter.anglican.org. She will direct your enquiry to the most appropriate officer to respond.



Diocesan Officers in the Education Team

From left to right

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Policy Approved by Diocesan Board of Education Committee	Policy implemented	Policy review date
16/06/2021	16/06/2021	Autumn 2023
Updated to reflect the changing educational landscape and DBE strategy	11/10/2023	Autumn 2025