



Board of Education
Diocese of Chelmsford



ACADEMISATION CONVERSION TOOLKIT

for Church of England Schools
in the Diocese of Chelmsford

**Promoting life in all its fullness
through Education across Essex
and East London**

*'I have come that they may have
life and have it to the full.'*

John 10:10

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The Chelmsford Diocesan Board of Education has prepared this academy conversion toolkit to support Church of England Governing Boards considering academy conversion. It should be read alongside the CDBE Academisation Strategy, the Trust Readiness Criteria for Growth, the Memorandum of Understanding between the CDBE and Church Majority MATs and the CDBE In-Principle Agreement process.

Schools should also refer to the latest DfE guidance and model documents, including the DfE guide to converting to academy status and the DfE collection of academy conversion documents. These resources are updated periodically and should be checked at each stage of the process.

We encourage all Governing Boards to liaise with their Local Authority representative at the earliest opportunity.

Introduction

The Chelmsford Diocesan Board of Education (CDBE) is committed to supporting Governing Boards on their individual journeys toward becoming an academy. This toolkit is designed to support a Governing Board during the process. We urge all governors to make early contact with a Diocesan School Adviser and to initiate a conversation with the Director of Education (DDE), Carrie Prior. The earlier we are engaged in conversation the more support that can be offered.

Schools considering conversion to academy status

Initial Steps

1. Governing boards are encouraged to consider academy conversion as part of wider strategic planning for the school's future, including sustainability, governance capacity, leadership, school improvement, finance, pupil numbers, and the long-term flourishing of the school as a Church school.
2. Once a Governing Board is beginning to actively consider academisation, we encourage a visit to our webpage '[Becoming an Academy](#)'. This provides access to key documents and guidance, including the CDBE Academisation Strategy, Trust Readiness Criteria for Growth, Memorandum of Understanding, and application process.
3. The Chair of Governors and Headteacher should engage in an initial conversation with the Director of Education (DDE), Carrie Prior. Early engagement allows for effective partnership working and ensures governors have access to appropriate advice and support. The DDE is available to attend Governing Board meetings to support strategic discussions and decision-making. The DDE may, where appropriate, facilitate conversations with other Church schools, MATs, and partners to support governors in exploring future organisational arrangements.
4. Governors should convene a full quorate governing board meeting to discuss the school's future organisational arrangements. If governors resolve not to explore academy conversion further at that stage, the governing board should ensure that the school's future organisational arrangements remain under regular review and are considered at least annually as part of strategic planning.
5. If the governing board resolves to explore academy conversion further, it should establish an Academy Working Group and agree its membership and terms of reference.



6. The Academy Working Group should commence research into potential Multi Academy Trusts (MATs) and undertake appropriate due diligence.

Research & Due Diligence

The CDBE website provides details of the CDBE approved Multi Academy Trusts. The CDBE would not normally approve Church School applications to join MATs that are not included on the approved list. Governing Boards are encouraged to research the named MATs and identify those which may warrant further exploration.

Once you have narrowed down the number of trusts, we encourage the working group to look in detail at each Trust's website and published information. This should provide a clear understanding of the Trust's vision, values and Christian ethos, its strategic direction, the schools already within the trust, and its approach to school governance, school improvement and partnership working.

It is sensible to have an initial conversation with the MAT CEO to ascertain whether the Trust would welcome an application from your school. MATs will have their own strategic priorities and growth plans. CEOs are often willing to speak to a Governing Board to share further information and to answer questions. We strongly encourage this engagement.

The MAT will also undertake detailed due diligence on your school. As the Trust acquires the school's assets, liabilities, and responsibilities, it must satisfy itself that the proposal is viable and sustainable. Equally, academy conversion is a significant decision for the Governing Board, and therefore it is important that sufficient due diligence is undertaken to ensure that the proposed Trust is the right strategic partner for the school.

Due diligence should help governors understand not only whether a Trust is a good fit for the school, but also whether the proposal aligns with the CDBE Academisation Strategy and the wider interests of Church education within the Diocese. Governors may wish to consider the Trust's leadership capacity, governance and accountability, school improvement capacity, financial sustainability, Christian distinctiveness, engagement with the Diocese, ability to support schools facing challenge and alignment with the wider diocesan system.

Every school will have its own priorities and areas for exploration; however, some examples of due diligence activities are outlined below:

Stage 1 Desk-based assessment

The purpose of Stage 1 is to develop an initial understanding of potential Trust partners and to identify those which warrant more detailed exploration. Governors should consider how each Trust aligns with the school's vision, values, and strategic direction.

- Trust website and published information
 - Vision, values, and Christian ethos
 - Strategic plans and growth ambitions

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- Educational performance and school improvement approach
- Governance structures and accountability arrangements
- Financial statements and annual reports
- Central services and organisational capacity
- News stories, case studies, and examples of Trust activity
- Schools already within the trust
 - School websites
 - Educational outcomes and trends
 - Ofsted outcomes
 - SIAMs outcomes
 - School vision and ethos
 - School social media and communications
- Church and diocesan engagement
 - Evidence of engagement with the Diocese
 - Participation in diocesan networks, events or initiatives
 - Support for Christian distinctiveness, RE and Collective Worship
- Publicly available information
 - Get information about schools website
 - School capacity and number on roll
 - School characteristics
 - Trust information
 - Published performance information and accountability measures

Following the completion of Stage 1 research, the working group may be able to reduce the number of potential MATs they wish to explore in greater detail through Stage 2 due diligence.

Stage 2 Due Diligence

Stage 2 provides an opportunity to gather more detailed information and test assumptions identified during Stage 1. This should include direct engagement with the MAT CEO and, where appropriate, other Trust leaders, school leaders, and governors within the Trust. The aim is to understand how the school would fit within the Trust, the support available, and the opportunities and challenges that membership may bring.

Areas for exploration could include:

- Christian Vision and Ethos
 - how the trust promotes and develops Christian distinctiveness
 - support for Religious Education and Collective Worship
 - relationships with parishes and church communities
 - SIAMS outcomes and improvement activity
- Leadership, Governance and Accountability
 - Trust leadership structure, skills, and capacity



- governance arrangements and scheme of delegation
 - local governance structures and responsibilities
 - Trust board minutes and governance review processes
- School Improvement
 - educational performance and trends across the Trust
 - school improvement model and capacity
 - examples of support provided to schools facing challenge
 - evidence of impact and sustained improvement
- People and Workforce
 - central team support and specialist expertise
 - HR policies, contracts, and local agreements
 - leadership structures within individual schools
 - TUPE process and workforce implications
 - staff deployment and staff: pupil ratios where relevant
- Financial and Operations
 - financial sustainability and future planning
 - school funding arrangements
 - central services offer and associated costs
 - property, estates, safeguarding and health and safety support
 - ICT systems, software, and operational infrastructure
- Strategic Alignment
 - the Trust's growth strategy and future plans
 - geographical fit and local partnerships
 - engagement with the diocese and wider Church school system
 - how the school would contribute to and benefit from Trust membership

Through these conversations governors should gain a clear understanding of how the school would fit within the Trust, the strengths the Trust would bring, and whether membership supports the long-term flourishing of the school and its Christian foundation.

Application for CDBE Consent

Following the completion of research and due diligence, the governing board should convene a full quorate meeting to consider all information gathered and determine whether it wishes to proceed with seeking academy conversion.

If governors resolve to proceed, the Governing Body must submit an application for diocesan consent. The application should identify the proposed Multi Academy Trust and provide evidence of the due diligence undertaken and the rationale for the proposal.

The Governing Board should engage in an appropriate consultation process with those who have an interest in the school changing status. For a Church school this includes seeking the views of the local



Parochial Church Council (PCC). Minutes of the PCC discussion should be included as part of the application process.

Applications are considered by the Chelmsford Diocesan Board of Education through the Schools Organisation and Resources Committee – Academisation (SORCA).

A detailed description of the diocesan approval process is set out in the guidance 'The Process for Seeking In-Principle Consent from the CDBE' and should be read alongside this toolkit.

Note: Any application by a Church of England school to the Department for Education for an Academy Order requires written Diocesan consent.

The Academisation Process

Following receipt of diocesan consent, schools should work closely with the Department of Education, the receiving Multi Academy trust and their professional advisers to progress the conversion process.

The precise steps will vary according to the circumstances of the school and Trust. However, the process will typically include:

- application for an academy order
- appointment of a DfE Project Lead
- legal due diligence and documentation
- consultation where required
- TUPE and staffing arrangements
- finance and operational planning
- land and property matters
- governance arrangements
- preparation for academy opening

Schools should refer to the latest DfE guidance and conversion documentation throughout the process, as national requirements are updated periodically.

The Education Team is available to provide advice and support throughout the process, particularly in relation to Church governance, land, Christian distinctiveness, Religious Education and Collective Worship.

Following conversion, responsibility for the operation of the school transfers to the Multi Academy Trust in accordance with the Trust's governance arrangements.

The MAT will lead the final stages of the conversion process, which may include:

- implementation of governance arrangements
- completion of financial and operational transition activities
- finalisation of land, property, and legal matters
- transfer of staff under TUPE arrangements

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- implementation of Trust systems, policies, and procedures
- communication with staff, pupils, parents, and the wider community
- preparation for the school's formal opening as an academy

The Education Team will continue to work with the school and the Trust throughout the conversion process, particularly in relation to church governance, Christian distinctiveness, Religious Education and Collective Worship.

This toolkit is intended to provide practical guidance for Church School governors considering academy conversion. It should not be regarded as a comprehensive statement of all legal, financial, governance or procedural requirements. Governing boards, Trustees, and academy trusts remain responsible for obtaining appropriate professional advice and satisfying themselves that all relevant requirements have been met. Schools should refer to the latest guidance published by the Department for Education and seek advice from the CDBE where appropriate.



Governing Board Strategic Checklist

Strategic Consideration

- ☐ Has the governing board considered the school's future organisational arrangements as part of its strategic planning?
- ☐ Has the governing board considered sustainability, leadership, governance, finance, school improvement, and pupil numbers?
- ☐ Has the governing board engaged with the Director of Education?

Research and Due Diligence

- ☐ Has an Academy Working Group been established?
- ☐ Has appropriate research and due diligence been undertaken?
- ☐ Have governors considered more than one potential MAT where appropriate?
- ☐ Does the governing board understand the educational, financial, governance and Christian distinctiveness implications of joining the proposed MAT?

Decision-Making

- ☐ Has the governing board considered all due diligence information?
- ☐ Has the governing board received answers to its questions?
- ☐ Has a full quorate governing board meeting considered the proposal?
- ☐ Has a formal governing board resolution been recorded?

Consultation and Consent

- ☐ Have the views of the PCC been sought and recorded?
- ☐ Has appropriate consultation been undertaken with relevant stakeholders?
- ☐ Has the CDBE application form been completed?
- ☐ Has diocesan consent been obtained?

Conversion Process

- ☐ Has the governing board identified appropriate professional support throughout the conversion process?
- ☐ Is the governing board satisfied that all legal, financial, HR and governance matters are being appropriately managed?
- ☐ Has the governing board referred to the latest DfE guidance and documentation?

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This checklist is intended as a prompt for governing boards and is not a comprehensive list of actions required during the academisation process. Schools should refer to current DfE guidance and seek appropriate professional advice throughout the conversion process.