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part of the



LDBS Academies Trust

LAT and LAT 2

Managing Change Policy

Document type	School Policy	Statutory DfE / Trust	Trust
Approval Level	Trust Board of Directors	Review Frequency	Biennial
Approval date	06/07/2026	Next Review Date	05/07/2028
On behalf of the Trust Board of Directors			
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Position	Chair of the School Board of Governors	Position	Headteacher
Publication to	☒ GovHub	☒ Staff info site	☐ Website

NOTE TO THE LOCAL ACADEMY COMMITTEES – MAY BE DELETED UPON LAC ADOPTION

This is the Trust Managing Change Policy. A space is foreseen above for the school to add its own name and logo. A box below is foreseen for the school to add its school-specific Values. Annex 1 should be completed by the school with the school-specific information. Please do not change the formatting of titles etc as the Policy contains cross-references. This document sets the Trust's procedures on how to manage change and the Trust terms and conditions to calculate redundancy and severance pay. Each Local Academy Committee (LAC) is requested to: (i) Approve this template (with Annex 1 - School-specific details) completed; (ii) Ensure local implementation complies with this Policy.

Version control update log: This version reverts back to the Trust's original Managing Change policy, which was incorrectly replaced with the LDBS template policy in October 2025. Contrary to the LDBS, the Trust as employer has to set conditions for redundancy and severance pay and cannot rely

on the wide range of local authority policies for their calculation as this does not guarantee equity for Trust-employed employees across different local authorities.

PLEASE UPDATE THE TABLE OF CONTENTS FOLLOWING THE REMOVAL OF THIS SECTION (Go stand on the table of contents and you will see an “update this table” button on the top right)!

TRUST VISION STATEMENT

“The kingdom of heaven is like a mustard seed, which a man took and planted in his field. Though it is the smallest of all seeds, yet when it grows, it is the largest of garden plants and becomes a tree, so that the birds come and perch in its branches.” (Matthew 13: 31-32)

In the parable of The Mustard Seed, Jesus reminds us that even the smallest of seeds has the potential to grow into the fullness of itself. We aim to provide the right environment for our children, and all whom we serve, to flourish into the fullness of themselves. He tells us these seeds grow into trees, capable of providing a home for a rich diversity of life, our work is to ensure all in our communities grow into people of compassion and wisdom with a deep spiritual understanding of how to support the needs of others.

SCHOOL VISION

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1 Introduction

- 1.1 The LDBS Academies Trust and the LDBS Academies Trust 2 (together referred to in this policy as “the Trust”) need to remain responsive and flexible in how it operates to ensure it continues to deliver an excellent and equitable education to all children. This will involve a process of continuous service improvement and innovation which may result in the need for organisational change, such as the introduction of new technology systems, strategy or staffing changes. External factors may also necessitate the need for change, such as change in government policy, legislation and market conditions.
- 1.2. The Trust is committed to managing change in a fair, consistent and legally compliant manner. The Trust is also committed to communicating openly and transparently and will undertake meaningful consultation with affected employees and their representatives, where applicable.
- 1.3. For the purposes of this Policy, “organisational change” refers to situations in which proposed change directly affects the terms and conditions, scope, duties or nature of an employee’s role.
- 1.4 The nature, size and scope of organisational change can vary considerably. The Trust will adapt this process, where appropriate, to reflect the circumstances of each proposed change.
- 1.5 The Trust is committed to avoiding redundancies wherever possible. The Trust will take all reasonable steps to support employees facing change, redundancy, or redeployment to minimise any adverse impact of change and to ensure that employees are provided with the tools and the support to cope with the change effectively and maintain their well-being.
- 1.6. This Policy will be reviewed every two years.

2 Scope

- 2.1 This policy applies to all proposed changes which affect employees of the Trust.
- 2.2 This Policy does not apply to (a) Agency staff; (b) Contractors; (c) New posts; (d) Changes affecting line management; and (e) Minor changes to the roles and/or the responsibilities of an employee.

3 Legal Framework

- 3.1 This Policy is intended to operate in accordance with applicable employment legislation and relevant Advisory, Conciliation and Arbitration Service ('ACAS') guidance in force at the time.

4 Identifying the need for change management

- 4.1 According to the Department for Education ('DfE'), it is the Headteacher's responsibility to ensure that the appropriate structure for the school is in place, as explained within the School Teachers Pay and Conditions ('STPC'). The Headteacher may delegate certain aspects of this responsibility to a member of the Senior Leadership Team ('SLT') of the school (e.g. delegating a change in administration services to the business manager).
- 4.2. The first step in any organisational change process is to understand why change is necessary and the scale of the change required. This may involve a review of the current structure, an analysis of the roles and activities and how these may change in the future.
- 4.3. The Headteacher must develop proposals in consultation with the Trust Human Resources Officer (currently the COO function) and inform the CEO as well as the Chair of the Local Academy Committee ('LAC') of any proposed changes. Where proposals affect teaching staff, the Headteacher should also seek advice from the CEO and the Trust's HR advisers, Grow Education Partners, as appropriate .
- 4.4. The following (non-exhaustive) list of issues may be considered when assessing whether there is a need for change:
- The school evaluation and improvement plan (including the priorities and vision for the school);
 - Recommendations from Ofsted;
 - Self-evaluations report findings;
 - Curriculum changes;
 - Operational reasons;
 - The school's financial circumstances; Legal requirements; and / or
 - Government initiatives.

5 Drafting a business case

- 5.1 A business case should be drafted to outline the proposed change, or changes, in greater detail.
- 5.2. The business case should include:
- The rationale for the proposed change or changes;
 - The revised organisation structure (and may include the new ways of working, skills and workforce development requirements);
 - A comparison and review of the current structure with the proposed structure, highlighting any requirements for change (specifically concerned working arrangements, staffing numbers, skills and knowledge);
 - Any new or updated job descriptions and / or person specifications with rationale; and

- A proposed timetable for consultation and implementation
- An equality impact assessment, or confirmation that equality impact has been considered, where appropriate.

- 5.3. The business case must be sent to the Trust's Chief Executive Officer ('CEO') for ratification. This will enable any changes to be viewed within the context of all Trust schools and ensure that the Trust is not exceeding 20 redundancies at any one time.
- 5.4 The Trust will have due regard to its obligations under the Equality Act 2010 when developing and implementing change proposals, including consideration of any disproportionate impact on employees with protected characteristics.

6 Communication

- 6.1. Effective, clear and honest communication is a key component of managing change successfully.
- 6.2. Once the business case has been ratified by the Trust CEO, the Headteacher will provide affected staff and their representatives with the business case, a copy of this policy and details of the consultation process, before formal consultation begins.

7 Consultation

- 7.1 The Trust is committed to working in partnership with trade union representatives, whenever possible, in the best interests of our employees. The Trust is committed to ensuring that employees who are not members of a trade union have equal access to the consultation process.
- 7.2 The purpose of the consultation is to enable a meaningful exchange of views and feedback on the proposals from employees and trade unions for the school to seriously consider.
- 7.3 The Trust will hold formal consultations for a minimum of thirty (30) calendar days, unless a longer period is required by law.
- 7.4. In the event where more than one Trust school is making redundancies within a 90-day period and the number of Trust employees at risk exceeds twenty (20), the Trust HR Officer (a role that currently resides with the Trust Chief Operating Officer) will notify the relevant government department as required in legislation.
- 7.5. The Headteacher and/or the nominated SLT member will liaise directly with individuals throughout the consultation process in addition to formal meetings with trade union representatives
- 7.6. Staff who are affected by the proposed changes and are absent from work due to a long-term sickness or maternity leave must also be consulted. The Trust will give due regard to individual circumstances in considering how best to communicate with all employees to ensure that they are not disadvantaged.
- 7.7. The Trust will give genuine and conscientious consideration to all representations made during the consultation before any final decision is taken.

8 Managing redundancies

8.1. Redundancies may arise within a Trust school in the following (non-exhaustive) circumstances:

- The school no longer requires the duties for which an employee was employed.
- The school has ceased, or intends to cease, to carry on operating in the place where the employee was employed.
- The requirements of the school for employees to carry out work of a particular kind has ceased or diminished or are expected to cease or diminish.
- The requirements of the school for the employee(s) to carry out work of a particular kind in the place where they were employed has ceased or diminished or are expected to cease or diminish.

8.2. The Trust will make sure that:

- All reasonable steps are taken to avoid compulsory redundancies and, where this is not possible, to reduce their number and mitigate their effects.
- Alternatives to compulsory redundancy will be thoroughly considered prior to any compulsory redundancy exercise being undertaken.
- The total number of redundancies made is kept to a minimum.
- Employees and their representatives are fully consulted on any proposals and their implementation.
- Selection for redundancies is determined using clear criteria that will be applied objectively and fairly.
- Every effort is made to re-deploy, or find suitable alternative work for, employees selected for redundancy.
- Support and advice will be provided to employees selected for redundancy to help them to find suitable work.
- Employees at risk of redundancy will be considered for re-deployment to suitable alternative vacancies across the Trust schools where available.
- Employees at risk of redundancy will be kept informed of any vacancies in Trust schools and will be guaranteed an interview for any posts in which they may be interested.

8.3. Voluntary redundancies

8.3.1 The Trust school will make every effort to avoid the need to make compulsory redundancies by offering employees, whose posts are at risk, the opportunity to apply for voluntary redundancy. In some situations, it may be possible to invite applications more generally across the whole school.

8.3.2 Requests for voluntary redundancies may be considered at the Trust's discretion, taking account of operational, financial and educational factors.

- In such an event the Headteacher will make a recommendation to the LAC Chair to convene a panel of three governors to make the final decision.
- If an employee is granted voluntary redundancy, an earlier date of termination may be agreed and a taxable sum reflecting the 'pay in lieu of notice' may be paid in addition to the redundancy payment.
- Redundancy compensation in a voluntary situation may be enhanced by up to 10%.

8.4. Redundancy criteria

- 8.4.1 Staff whose work has either ceased, or diminished, or is expected to do so, would be part of a selection pool for redundancy.
- 8.4.2 Consideration will be made as to whether other groups of employees performing similar work, should be included in the pool. The inclusion of an employee in the pool should be consistent.
- 8.4.3 The selection of employees for redundancy will be based on objective criteria, which will be discussed as part of the consultation. The criteria will be:
- Supported by clear, verifiable evidence;
 - Applied fairly and consistently;
 - Appropriate and relevant to the needs of the Trust; and
 - Designed so as not to unlawfully discriminate, whether directly or indirectly, against any employee with a protected characteristic under the Equality Act.
- 8.4.4 Where a teaching learning responsibility ('TLR') post is deleted from a structure this will not automatically result in a selection of redundancy for that teacher.
- 8.4.5 It is important that Trust schools can retain employees with the attributes and skills required to meet its future operational, curricular, pastoral and organisational needs. Therefore, the Trust may utilise competitive interviews and / or appropriate skills tests as selection tools. The interview panel in the selection process will consist of the Headteacher, a Trust executive and/or a member of the Local Academy Committee (local governor).

8.5. Entitlement and calculation of redundancy payment

- 8.5.1 Employees with that least two years' continuous service are entitled to a statutory redundancy payment, subject to applicable legal rules and any Trust enhancement set out in this Policy.
- 8.5.2 The redundancy payment will be based on the employee's actual weekly pay.
- 8.5.3 If an employee has opted for a voluntary redundancy, the calculation will be based on the actual weeks' pay for all staff grades, even those whose salary exceeds the statutory redundancy rate. This amount is adjusted in line with any changes to the statutory redundancy weekly pay and will be based on the rates applicable at of the date of redundancy.
- 8.5.4 The number of weeks' pay on which the redundancy payment is based is as follows and up to a maximum of 20 weeks:
- 0.5 week's pay for each full year of service where the employee is under the age of 22;
 - 1 week's pay for each full year of service where the employee is aged 22 to 40;
 - 1.5 weeks' pay for each full year of service where the employee's age is 41 and over.

Consideration will be given where employees are subject to specific conditions under the Transfer of Undertakings (Protection of Employment) Regulations.

- 8.5.5 The Trust will ask employees before making a redundancy payment whether or not they have been offered another job with a Modification Order and, if so, whether they intend to take up the offer within 4 weeks of finishing their current job to ensure that they are entitled to a redundancy payment.

- 8.5.6 At the end of the consultation period (with the approval of the LAC Chair, where applicable) employees whose jobs are to be confirmed as redundant will be informed at a meeting that they will be issued with their notice of redundancy. The affected employees will also receive the period of notice to which they are entitled, details of any redundancy payment together with the timescales for doing this and their right to appeal.
- 8.5.7 The Headteacher will also inform the affected employee of any support facilities which are available. This will be confirmed in writing no more than 5 school days from the meeting

9 Job matching and role allocation

- 9.1 There are specific legal requirements whereby employees at risk of redundancy are given the chance to apply for alternative roles before they are offered more widely.

9.2 Assimilation:

- 9.2.1 Assimilation applies where there is little or no change between the role in the old and new structure, and the number of roles remains the same or there are more roles available than employees matched to the roles.
- 9.2.2 If there are more roles than the number of employees matched, then the employee is automatically appointed to the role without an assessment process or trial period.
- 9.2.3 If the employee declines the role, there is no entitlement to redundancy pay.

9.3 Ring-fenced interviews

- 9.3.1 Ring-fencing applies where there is no material change between the role in the old structure and the role in the new structure and there are fewer roles available than employees matched to the roles.
- 9.3.2 Groups of staff identified as being at risk of redundancy will be ring-fenced to any suitable role within the new structure.
- 9.3.3 The Trust will ensure that any employee at risk who meet the essential requirements for a suitable vacancy are offered an interview for suitable alternative roles across the Trust during the consultation period.
- 9.3.4 Employees will be asked to complete a personal statement for any role for in which they are interested but will be guaranteed an interview.
- 9.3.5 Employees will be entitled to time off to look for new work or to undertake training through pre-planning with the Headteacher.
- 9.3.6 Employees should give as much notice as possible if they need time off to attend an external interview.

9.4. Suitable alternative employment

- 9.4.1 Suitable alternative employment applies where the role in the new structure is not fundamentally the same but sufficiently similar in nature to be considered possible alternative employment. The Trust HR Officer will identify possible alternative roles based on the

requirements of the employee's current role as compared with those of the duties, responsibilities, skills required and grade of the new role(s).

9.4.2 The Trust is committed to both supporting its employees and ensuring that they retain a highly skilled workforce with the skills and attitudes to promote the best outcomes for pupils.

9.4.3 The Trust will consider training staff where feasible in order to avoid losing committed employees through redundancy.

9.4.4 The employee will be offered opportunities to be redeployed across the Trust.

9.5. Premature retirement

9.5.1 Applications from employees who would like to be considered for premature retirement should be submitted in writing to the LAC Chair.

9.5.2 The decision to grant early retirement is not automatic and is entirely discretionary.

10 Appeals

10.1 Employees have the right to appeal against any decision taken as part of this policy to:

- Change their job role, working arrangements or contract;
- To make them redundant;
- Not to appoint them to a role following an interview or to assimilate them;
- To refuse an application for voluntary redundancy or premature retirement; and/or
- Any other reason connected to a change in circumstance for the employee.

10.2 Appeals will be heard by a panel that has had no prior involvement in the decision under appeal

10.3 In order to appeal, the employee should notify the Headteacher within 5 school days of being notified of the decision affecting their employment.

10.4 The employee should state the grounds and brief reasons for their appeal. These will normally be based on one or more of the following:

- The selection process has been unfair;
- The job is not redundant;
- The policy and procedures have not been followed correctly; and/or
- There are new circumstances or information which the employee would like to be considered.

10.5 An appeal panel consisting of 3 LAC members/governors will be convened as soon as is reasonably possible upon receipt of the written appeal. In the case of an appeal against redundancy, every effort will be made to conclude the matter prior to the termination date.

10.6 The employee will be given at least 5 school days' notice of the date, time and location of the appeal hearing, and will have the right to be accompanied by a trade union representative or work colleague.

10.7 The procedure for the Appeal Hearing will be:

- The employee will be invited to present their case for appeal;
- The Headteacher will present the background and reasons for the proposed change;

- Appeal panel members will ask questions of the Headteacher and the employee who has appealed;
- The hearing will be adjourned to allow the panel to independently review the evidence;
- Following the adjournment, the Chair of the panel will orally confirm or cancel the contractual change or redundancy with the appellant and their representative;
- It may, on occasion, be necessary to delay a decision if further investigation is needed, in which case the hearing will be reconvened to confirm the decision to the appellant;
- All decisions will be confirmed within 5 school days of the appeal hearing; and
- The decision of the appeal hearing is final and there is no further right of appeal under this policy.

10.7 The LAC will be supported by an HR adviser to advise on matters of procedure. The meeting will be minuted and copies of the minutes will be available to the appellant and their representative. Discussions by the panel during the adjournments will not be minuted.

10.8 If the appeal fails in the case of a redundancy, the termination date will remain as the date in the letter of notice of redundancy.

11 Communication and review

This policy will be made available to all staff on the school's shared drive or intranet by the school business manager, who will communicate any updates to staff by email.

This policy will be reviewed every two years or earlier if required by changes in law, guidance or Trust practice. It is then presented for adoption by the Trust Board of Directors.