

## Foundation Trustee and Member Application Process Summary Guide for Governance Professionals January 2025

We have recently made some changes to the application for new/first time Foundation Trustees and Members.

For you as Governance Professionals, the changes are minor and are highlighted in the matrix below.

The process for starting a new or renewal application online will remain the same. You will access your Governance Professional's portal page via <https://clerkbathwells.dioce.se>. If you have not previously used the portal and need login credentials set up, or if you need them re-set, please contact Josie Halla and she will assist you.

Josie Halla  
Education Administrator – School Organisation and Governance  
[josie.halla@bathwells.anglican.org](mailto:josie.halla@bathwells.anglican.org)

### Multi Academy Trusts

<p>New Foundation Trustee or Member</p>	<ul style="list-style-type: none"> <li>• Governance Professional informs DBE and Trust Board of vacancy for Foundation Trustee or Member</li> <li>• Trust Board identifies an individual with the required skills</li> <li>• Once candidate is identified and any due diligence preparatory work completed, Governance Professional initiates a new application via their Diosys trust portal</li> <li>• Nominee receives an email with link to the application form. Nominee completes and submits the application</li> <li>• Nominee has a conversation with a Diocesan Advisor about the role. The Advisor will contact the nominee by email to arrange a call.</li> <li>• Application is reviewed by DBE panel</li> <li>• Once approved by the DBE review panel, Education Administrator will finalise and issue the appointment letter</li> <li>• Notes:             <ul style="list-style-type: none"> <li>○ No reference is required for new/first time Foundation Trustee or Member</li> </ul> </li> </ul>
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	<ul style="list-style-type: none"> <li>○ In lieu of the reference all new Foundation trustee and Member applicants will have a short meeting with a Diocesan Advisor</li> <li>○ Categories are no longer applicable</li> </ul>
Renewing Trustee	<ul style="list-style-type: none"> <li>● A Foundation Trustee’s term is coming to an end, and they want to renew for a further term <ul style="list-style-type: none"> <li>○ Governance Professional confirms with Trust Board that renewal is approved</li> <li>○ Governance Professional obtains a renewal reference from the Chair of the trust board</li> <li>○ If renewing Trustee is the Chair, a reference should be obtained from the Trust CEO</li> </ul> </li> <li>● Once the reference has been obtained, the Governance Professional initiates a renewal application via their Diosys trust portal</li> <li>● Renewing Trustee receives an email with link to the application form. Application is then completed and submitted.</li> <li>● Renewal application is reviewed by DBE panel</li> <li>● Once approved by the DBE review panel, Education Administrator will finalise and issue the re-appointment letter</li> <li>● Notes: <ul style="list-style-type: none"> <li>○ When Governance Professional initiates the renewal, they should be sure to <b>click the RENEWAL link</b> at the very top of the pop-up form.</li> </ul> </li> </ul>