

# State Expectations

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An investigation into the history and experiences  
of fee-paying independent schools converting  
into state schools

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Levelling  
The  
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Field



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## Levelling the Playing Field

Private Education Policy Forum (PEPF) is a charitable thinktank which supports research focused on fee-paying independent schools with the aim of increasing transparency of the sector and improving equality of opportunity and outcomes with state education.

The thinktank aims to bring research and fresh thinking to the educational and social impacts of independent schools and other forms of private education, and to propose evidenced ways to improve education policy.

There has been significant media coverage and public debate about the British government's introduction of VAT on school fees last year, yet little in the way of other thoughtful proposals for a fairer system. The thinktank is commissioning a series of reports in partnership with policy experts and academics, focused on potential reforms which might improve educational outcomes for all.

We have called this the **Levelling the Playing Field** series. The intention is for the series to present balanced and feasible ideas for government-led reforms which take the best the independent school system can offer, but spread the benefits widely.

This first report in the series examines voluntary independent-to-state school conversions – the process by which formerly private institutions can become part of the state sector.

## Foreword

The authors - Tilly Clough, an academic researching private schools at Queen's University Belfast and Tom Richmond, education policy analyst and former adviser to two education secretaries - make the case for establishing a clear, permanent conversion route within the Department for Education for independent schools wishing to switch.

Their evidence highlights two findings. First, schools that convert, despite entering a new system of funding, regulation and accountability, go on to achieve Ofsted ratings comparable to other state schools and perform at a similar or higher academic level within their local authorities.

Second, the removal of academic selection results in these schools becoming far more representative of their local communities, including higher proportions of pupils with special educational needs and those pupils who are eligible for free school meals.

Yet the administrative and regulatory barriers surrounding conversion currently appear to discourage schools that might otherwise wish to become fee-free and open to all. At the same time, such proposals require careful consideration. Further research will be needed to assess demand and geographic need.

With many private schools likely to face financial pressures in the coming years following VAT and related policy changes, interest in conversion is likely to grow.

As the authors argue, it may become increasingly important that the government better enables viable schools to join the state sector.

**Private Education Policy Forum**

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# 1. Introduction

The conversion of fee-charging independent schools into the state sector has had a complex history, but it is a topic garnering growing interest in the current political landscape.<sup>1</sup> While such conversions are rare, they had something of a renaissance from 2007 to 2017 due to the development of academies (state-funded schools that operate independently of local authorities) and the later introduction of ‘free schools’ (essentially new academies). Over the past two decades, these two initiatives have enabled a small but significant number of independent schools to transition into the state sector, often retaining their ethos and identity but relinquishing fees in exchange for public funding.

Since the General Election in July 2024, independent schools have found themselves facing significant political and financial headwinds. In line with the Labour Party’s 2024 election manifesto commitment “to invest in our state schools”,<sup>2</sup> the Government eliminated the VAT exemption on independent school fees in January 2025<sup>3</sup> and removed independent schools’ charitable business rates relief in April 2025.<sup>4</sup> When these changes are combined with the higher employer National Insurance contributions announced in the 2024 Autumn Budget,<sup>5</sup> along with continued increases to National Minimum Wage rates, the financial pressures on many independent schools are likely to have sharply increased – particularly for smaller institutions with limited endowments or declining enrolments.<sup>6</sup> Consequently, the prospect of joining the state sector may have become more attractive for some schools in recent months.

## 1.1. Transitioning from the Independent to the State Sector: A Brief History

Although independent schools can convert into local authority ‘maintained’ schools, this has generally applied to very small and faith-based schools.<sup>7</sup> In contrast, since the early 2000s a total of 27 independent schools in England have moved into the state sector as academies or by establishing themselves as free schools (see Figure 1).<sup>8</sup> While this figure is small – just over 1 per cent of the approximately 2,500 independent schools in England and Wales – it nonetheless represents a significant shift for the individual schools concerned and offers insights into the changing landscape of school governance.<sup>9</sup> Of these 27, nine schools followed the academies route and 18 schools entered the state sector as free schools, although three free schools have since closed.<sup>10</sup>

1 Throughout this report, we refer to ‘fee-charging independent schools’ as ‘independent schools’, except where otherwise specified. The term ‘independent’ is a legal category that also includes academies, so distinguishing fee-charging schools is important in this context.

2 The Labour Party, *Change: Labour Party Manifesto 2024* (London, 2024), 82.

3 HMRC, ‘Policy Paper: Private School Fees – VAT Measure’, Webpage, 2024.

4 ‘Non-Domestic Rating (Multipliers and Private Schools) Act 2025’ (n.d.).

5 HM Treasury, ‘Policy Paper: Autumn Budget 2024’, Webpage, 2024.

6 Civil Society, ‘Commission Opens Compliance Case into Independent School Charity over Closure’, Webpage, 2025; BBC News online, ‘VAT Change Is Existential Threat to Private Schools – Head Teacher’, 2024.

7 18 independent schools converted to local authority maintained schools between 2001 and 2020.

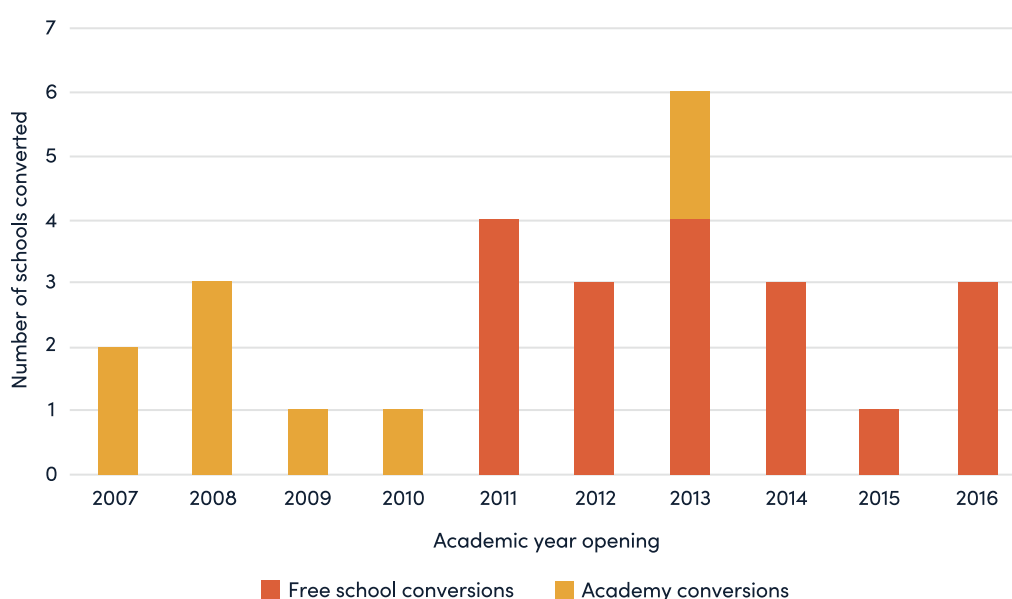
8 These totals are based on data collected for this research through a Freedom of Information request and cross-referenced with the Get Information About Schools database. For further detail, see the methodology section (Chapter Two) and Appendix 1 for a full list of schools.

9 Independent Schools Council, ‘Research’, Webpage, 2025.

10 Two of these schools (St Anthony’s School and Langdale free school) fully closed. One school, St Michael’s Secondary School, initially converted in 2012, but in 2016 closed and merged with an academy converter, Cambourne Science and International Academy. For the full list of schools, see Appendix 1. Moreover, one academy (Montpelier High School) has since technically closed, as it switched from being a standalone academy to joining a Multi Academy Trust in 2024.

The average size of converted independent schools is 595 pupils, but there is significant variation: some, like Peaslake Free School, are very small (32 pupils), while others, such as William Hulme's Grammar School, are much larger (1,611 pupils).<sup>11</sup> While the absolute number of conversions is small, the split between the two routes is revealing. The relatively low take-up of the academies route reflects both the narrow policy window in which it was permitted as well as the degree of institutional support available. By contrast, the free school route became more prominent in the 2010s, shaped by a formalised application process and a political context that actively encouraged new state-funded provision. Even so, while policy space existed for independent schools to convert, few chose to do so, and those that did often required a bespoke path through the conversion process.

**Figure 1: the number of independent schools that converted into the state sector by conversion route (2007 to present)**



### 1.1.1. The academies route

The academies programme was first introduced under the previous Labour Government by Education Secretary David Blunkett in 2000 as part of a broader strategy to improve education standards, particularly in underperforming state schools. Described as a “radical new approach” to education,<sup>12</sup> the initiative aimed to replace failing schools with independently-managed state-funded institutions that had greater autonomy over their curriculum, staffing and budgets.<sup>13</sup> Although originally focused on schools in financial difficulty, the programme soon widened in scope. By 2006, some high-performing maintained schools – and a small number of independent schools – had begun the process of joining the state sector as academies.<sup>14</sup>

<sup>11</sup> GOV.UK, ‘Get Information about Schools’, Webpage, 2025.

<sup>12</sup> Martin Rogers and Frances Migniuolo, ‘A New Direction: A Review of the School Academies Programme’ (Trades Union Congress, July 2007).

<sup>13</sup> LGC Contributor, ‘Blunkett Sets out Radical New Agenda for Inner City School Diversity & Improvement’, *Local Government Chronicle (LGC)* (blog), 16 March 2000.

<sup>14</sup> Martin Rogers and Frances Migniuolo, ‘A New Direction: A Review of the School Academies Programme’.

In 2007, the then Department for Children, Schools and Families (DCSF) published a prospectus outlining the potential role of independent schools in the academies programme. Alongside options for independent schools ‘sponsoring’ academies (i.e. offering their formal backing and resources), the prospectus encouraged independent schools to consider becoming academies themselves “to broaden [their] intake and spread educational opportunity to all local children where there is a need for more high quality school places.”<sup>15</sup> The prospectus went on to describe a conversion process involving an initial Expression of Interest, followed by a feasibility study and the negotiation of a funding agreement with the DCSF.

The inclusion of independent schools within the academies programme laid the groundwork for its expansion under the 2010 Conservative–Liberal Democrat coalition. The Academies Act 2010 (hereafter ‘Academies Act’) extended the option of academy status to all maintained schools and created a more formalised route for independent schools to convert.<sup>16</sup> Even before the Academies Act, seven independent schools had converted into academies.<sup>17</sup> William Hulme’s Grammar School, one of the first, began its conversion in 2005 and reopened as an academy as part of the United Learning Trust in 2007. Belvedere School, which became part of the Girls’ Day School Trust, also opened as an academy that year.

Despite the Academies Act solidifying the route to conversion, only three schools have converted via this route since 2010. The last schools to take this route – Kings Priory School and Liverpool College – converted in 2013. Although the relevant legislation remains in force,<sup>18</sup> increased regulatory oversight and a shift towards tighter central control have reduced the autonomy that once defined the academies model. Of the nine independent schools that have converted to academy status, eight remain operational.<sup>19</sup> One school – Montpellier High School – has since switched from being a standalone academy to joining a Multi Academy Trust (MAT) following an ‘Inadequate’ Ofsted rating in 2022. It became part of E-ACT in 2024.<sup>20</sup>

### 1.1.2. The free schools route

The conversion of independent schools into state-funded free schools was a limited but noteworthy dimension of the Coalition Government’s post-2010 reforms. It was described at the time as both a pragmatic “lifeline” for struggling schools and as a demonstration of policy flexibility.<sup>21</sup>

<sup>15</sup> Department for Children, Schools and Families, ‘Academies & Independent Schools: Prospectus’, 2007, 2.

<sup>16</sup> ‘Academies Act 2010’ (n.d.), secs 3–8, as originally enacted, for the process of application of conversion of schools into Academies. This encompasses practical guidance, including transfer of school surpluses and property, in addition to law surrounding consultation on conversion.

<sup>17</sup> Successor school names, where different, are as follows: The Belvedere Academy, Bristol Cathedral Choir School, The Steiner Academy Hereford, Montpellier High School, Birkenhead High School Academy. Those not mentioned remained the same.

<sup>18</sup> Academies Act 2010, secs 3–8.

<sup>19</sup> And as such will be included in the analysis throughout this report.

<sup>20</sup> BBC News online, ‘Bristol Montpellier High School Receives Termination Warning’, 12 July 2022.

<sup>21</sup> Andrew Lewer, “‘free school Status Could Offer a Lifeline to Private Schools’”, School Management Plus, 31 October 2024.

Legally, a free school is a type of academy. Introduced under the Academies Act and expanded via the Education Act 2011, free schools are new academies that operate under a funding agreement with the Education Secretary. Section 6A of the Education and Inspections Act 2006 – inserted by the 2011 Act – codified what became known as the “free school presumption”: where a new school is needed, the default option should be a free school i.e. a new academy.<sup>22</sup>

Unlike the academy route, which typically involves converting an existing school, the free school process technically requires the establishment of a new legal entity. For independent schools, this meant that the existing institution had to close, and a new trust had to be created to open a free school on the same site. While buildings, staff and community links may be preserved, the free school is formally distinct from the original entity. This makes the process more complex, and more disruptive, than a typical academy conversion.<sup>23</sup>

In June 2010, Education Secretary Michael Gove invited applications to open free schools. The political logic was clear: free schools offered a way to diversify the educational landscape and demonstrate responsiveness to community initiatives. The inclusion of independent schools extended this logic by allowing the state to acquire existing educational infrastructure and repurpose it for public use. As one analysis put it, the arrangement allowed government to offer “an alternative route for established independent educational providers to survive” while avoiding the politically fraught optics of outright school closures.<sup>24</sup> In cases where an independent school building would otherwise sit vacant, the state could gain access to facilities via lease or transfer, sometimes on favourable terms.<sup>25</sup>

### 1.1.3. Differing Processes

One notable difference between the academy and free school routes was the degree of procedural flexibility on offer. Unlike free schools, whose establishment followed a more uniform and prescriptive model, academy conversions before 2010 provided considerable scope to adapt processes to a school’s unique circumstances. As the 2007 DCSF prospectus highlighted, this enabled government officials to “tailor the process to the needs of each type of project, rather than applying a rigid template.”<sup>26</sup> In practice, this flexibility meant that timelines, consultation processes and partnership arrangements could vary significantly. Some conversions involved protracted negotiations over land ownership or governance, while others advanced more rapidly through pre-existing relationships with sponsoring trusts or local authorities. For independent schools – often with differing motivations and structural arrangements (for example, with some being charitable trusts) – this flexibility was particularly valuable, allowing space to preserve aspects of their ethos or adapt governance models to meet both state requirements and existing internal expectations.

22 Department for Education, ‘Guidance: Establishing a New Academy: Free School Presumption’, Webpage, 2024.

23 See Ben Williams, ‘The 2010–15 Coalition Government and the Legacy of free schools in England’, *Policy Futures in Education* 22, no. 5 (1 June 2024): 793–809, <https://doi.org/10.1177/14782103231176360>.

24 Lewer, “free school Status Could Offer a Lifeline to Private Schools”.

25 West, Anne (2015) Education policy and governance in England under the Coalition Government (2010–15): academies, the pupil premium and free early education. *London Review of Education*, 13 (2). pp. 21–36. ISSN 1474–8460

26 Department for Children, Schools and Families, ‘Academies & Independent Schools: Prospectus’, 2007, 21.

Another distinguishing feature was the emphasis on confidentiality and discretion when converting into an academy. Independent schools pursuing academy conversions were permitted to engage in preliminary discussions with government officials in private, without the immediate requirement for public disclosure. This allowed schools to assess the feasibility of a conversion discreetly before notifying staff, parents or other stakeholders. The Academies Act reflected and formalised this flexibility as Section 5 obliges governing bodies only to consult “such persons as they think appropriate” about the proposed conversion without specifying precisely whom or when.<sup>27</sup> Typically, formal consultations only occurred shortly before finalising the funding agreement – often just two or three weeks prior to conversion – enabling schools to make considerable progress with the conversion before opening discussions to wider scrutiny.<sup>28</sup> By contrast, the free school route imposed clearer guidelines that required consultations earlier and more explicitly. Together, these flexible and confidential aspects of the academy conversion route made it particularly attractive for independent schools facing an uncertain future.

## 1.2. The Current State of Play

Although neither the academies route nor the free schools route for independent school conversions has been formally closed by government policy, both have seen a marked slowdown in recent years, with the last school to follow either route doing so in 2016.

The free schools programme had seen a notable decline in applications from independent schools, with none received after 2014. After 2015, the Government’s emphasis shifted away from expanding new provision and towards improving existing schools, and free schools were no longer framed as a central tool for structural reform.<sup>29</sup> Similarly, the academies route has waned as a pathway for independent schools. From 2016 onwards, the Department for Education (DfE) reoriented its focus towards strengthening and consolidating MATs, with a growing emphasis on “greater collaboration” and school-led improvement rather than structural innovation.<sup>30</sup> Consequently, a converting independent school would almost certainly have to join a MAT on entering the state sector, which could make the conversion a more complicated and arduous journey than that faced by previous converters that remained as standalone institutions.

Against the backdrop of a recent decline in conversions, this report examines previous instances of independent school conversions and analyses the routes that schools have previously used to convert into the state sector. In doing so, it explores the motivations behind such conversions, the processes involved and their subsequent outcomes. The report begins by investigating the factors that influenced independent schools’ decisions to convert, followed by an analysis of the challenges encountered during conversion and the impact that converting into the state sector had on each school’s educational performance. The report concludes with recommendations for how to approach the conversion of independent schools to state schools in future.

27 Academies Act 2010, sec. 5(1).

28 Ibid., sec. 5(3); ‘FAQs: Converting to Academy Status | Academisation of Schools | Browne Jacobson’, Webpage, 2025.

29 Department for Education, ‘Educational Excellence Everywhere’, Webpage, 2016.

30 House of Commons Education Committee, *Multi-Academy Trusts: Seventh Report of Session 2016-17*, HC 204 (2017), 4; Department for Education, *Educational Excellence Everywhere*, 53.

## 2. Methods

This report draws on both primary and secondary sources of qualitative data. Primary data includes two main sources. First, a Freedom of Information request was submitted to the DfE to obtain comprehensive records of fee-charging independent schools in England and Wales that have transitioned into the state sector via the academies or free schools route. These documents provided foundational data on the number, timing and official classification of such conversions. We cross-referenced this dataset with entries in the Get Information on Schools database to verify school details and clarify discrepancies. A list of schools discussed throughout this report, sourced via these methods, is available in Appendix 1.

Second, the report incorporates insight from seven detailed anonymised interviews with individuals directly involved in school conversions. These included governors, headteachers and consultants with experience navigating the academies and free schools pathways. All interviews were conducted under conditions of anonymity, allowing for open discussion of both practical and strategic considerations. To protect participant identities in such a small field, no direct quotations – either anonymised or otherwise – are included in the report.

Secondary sources were used to evaluate the historical development, policy context and reported outcomes of the academies and free schools programmes. This desk-based research drew on a wide range of materials, including free schools application forms, DfE documents, media reports, legal and policy commentary and academic journal articles. In bringing these sources together, the report synthesises material that has not previously been examined in a single study, offering a unique overview of this under-researched area of school policy.

Certain methodological challenges inevitably shaped the analysis. While the free schools programme used a standardised application form, schools interpreted and completed these forms in highly variable ways, meaning the data was not always easily comparable. More broadly, limitations in the availability, consistency and clarity of official data, as well as the opacity of some processes, place constraints on definitive conclusions. Nevertheless, every effort has been made to ensure accuracy and to triangulate sources where possible.

## 3. Rationale for Conversion: Understanding the Drivers Behind School Transitions to the State Sector

The decision by some independent schools in England and Wales to join the state-funded sector – either via the academy or free school routes – was shaped by a range of pressures and aspirations. To understand the motivations behind these decisions, it is possible to draw on several sources including official application documents, media coverage and public statements by school leaders. For example, all schools that entered the state sector through the free school route were required to provide a written rationale as part of their application, offering a valuable insight into their stated intentions, although no such requirement applied to schools that converted through the academies programme. In these cases, motivations are often inferred from public commentary or retrospective accounts.<sup>31</sup> This chapter will therefore explore the variety of driving forces that have sat behind previous conversions into the state sector.

### 3.1. Financial Sustainability and Declining Pupil Numbers

For many independent schools, concerns about financial sustainability were a significant factor in their decision to convert. While not all schools referred explicitly to financial difficulties in their applications or public statements, several did so, and many were operating within clear fiscal constraints. Other schools made more implicit references to financial pressures, often linking their decision to wider demographic changes in the surrounding area.

For schools facing financial difficulty, conversion was sometimes viewed as a route to stability. In particular, for independent schools operating with significant levels of debt, joining the state sector provided access to public funding and the prospect of long-term sustainability. Academy converters were eligible for a £25,000 transition grant, and several schools also received major capital investment.<sup>32</sup> The King’s School in North Tyneside, for example, had £5 million of debt written off post-conversion.<sup>33</sup> Birkenhead High School in the Wirral underwent a £12 million redevelopment,<sup>34</sup> Hereford Steiner School joined a trust planning a £16 million new building<sup>35</sup> and St Anthony’s School in the Forest of Dean received £840,000 for refurbishment after they became a free school.<sup>36</sup>

Some schools explicitly referenced internal financial difficulties as a reason for conversion. Polam Hall School in Darlington had a long-term loan and overdraft facility and was struggling to meet growing demand for bursaries.<sup>37</sup> The then Headteacher said the school had begun looking at alternatives “before we got to the point of no return.”<sup>38</sup> A number of schools made similar explicit links between financial sustainability and conversion.

31 It is also important to recognise that these accounts were shaped for particular audiences and purposes. For instance, free school applications are written to persuade the Department for Education to approve the proposal, and there is no requirement to provide a detailed account of a school’s financial position at this early stage. Although these applications are uploaded onto the Department for Education website, much of the specific financials are redacted.

32 ‘Cost of Converting Liverpool College into an Academy’, GOV.UK, Webpage, 2025.

33 Warwick Mansell, ‘Education in Brief: Private School’s £5m Debts Paid off as It Becomes an Academy’, *The Guardian*, 12 August 2013.

34 Willmott Dixon, ‘Willmott Dixon Secures £10m Birkenhead High School Academy’, Webpage, 21 February 2011.

35 Francis Beckett, ‘Protests over Plans for New Steiner Academy’, *The Guardian*, 10 March 2008.

36 Warwick Mansell, ‘Why Spend £840k Renovating a School and Then Close It?’, *The Guardian*, 8 April 2025.

37 Department for Education, ‘free school Application Form: Polam Hall School (Wave 6)’, 2015, 4, 17.

38 Kaye Wiggins, ‘What’s next for Private Schools? Free Education’, *TES*, 3 July 2015.

Batley Grammar School said it was “unable to meet the demand for means-tested bursaries.”<sup>39</sup> Some schools stated that there had been an increased requirement for bursaries, which they had been unable to offer. The leaders of Chetwynde School in Cumbria reported that most recent bursary requests were “beyond the realms of possibility,” with only eight of 24 requests being met the previous year.<sup>40</sup> Consequently, they were seeking conversion to open up their educational opportunities to more individuals in the surrounding areas.

Structural disadvantages often compounded this inability to meet the cost of maintaining access to a broad range of families. Peaslake School near Guildford cited “the rise in operating costs, particularly teacher salaries; a natural limit to covenant support from our small village; the ceiling of fundraising effort... [and] a reputation for high parental burden... which is putting off some potential parents, particularly those from dual working families”.<sup>41</sup> In such cases, the challenges were not only financial but embedded in the social context in which the school operated, limiting its capacity to remain accessible without external support.

Many schools reported falling pupil numbers, which contributed directly to financial pressures that were often intertwined with wider demographic and educational changes in their local areas.<sup>42</sup> For instance, Grindon Hall Christian School in Sunderland noted that many families had to withdraw due to affordability issues despite the use of bursaries.<sup>43</sup> Before becoming an academy in 2013, Liverpool College’s enrolment had dropped from 1,100 to 735,<sup>44</sup> with then-Principal Hans Broekman explaining that while demand for high-quality education remained strong, “fewer families could afford annual fees of £10,000.”<sup>45</sup> Similarly, William Hulme’s Grammar School in Manchester saw enrolment fall from 760 to 419, a decline its then principal, Stephen Patriarca, linked to local demographic shifts.<sup>46</sup> These wider pressures – arising from changes in population, housing and patterns of school choice – were also cited by Maharishi School, which described its location as serving an “economically deprived population.”<sup>47</sup> Similar language appeared in free school applications from Holy Trinity School, Grindon Hall School and Chetwynde School, reflecting how local socio-economic contexts increasingly shaped the viability of fee-charging models.<sup>48</sup>

Some schools’ specific contexts meant that reducing pupil numbers were a particular concern. For example, with 17 independent schools in the city the local competition for Bristol Cathedral School, which specialises in choral singing, was intense, and declining applications threatened its choral tradition. The then Headteacher explained that the conversion allowed the school to maintain this specialism while reaching pupils from “a wide[r] range of backgrounds.”<sup>49</sup>

39 Department for Education, ‘free school Application Form: Batley Grammar School (Wave 1)’, 2011, 7.

40 Department for Education, ‘free school Application Form: Chetwynde School (Wave 4)’, 2014, 15.

41 Department for Education, ‘free school Application Form: Peaslake School (Wave 3)’, 2013, 13.

42 Mansell, ‘Education in Brief’.

43 Department for Education, ‘free school Application Form: Grindon Hall Christian School (Wave 2)’, 2012, 10.

44 Richard Garner, ‘Private College Cuts Its Old-School Ties’, *The Independent*, 8 June 2013.

45 Ibid.

46 James Morrison, ‘Independents Go All-Inclusive’, *The Independent*, 4 October 2007.

47 Department for Education, ‘free school Application Form: Maharishi School of the Age of Enlightenment (Wave 1)’, 2011, 6.

48 Department for Education, ‘free school Application Form: Holy Trinity School (Wave 4)’, 2014; Department for Education, ‘free school Application Form: Grindon Hall Christian School (Wave 2)’, 2012; Department for Education, ‘free school Application Form: Chetwynde School (Wave 4)’.

49 Ibid.

### 3.2. Social Mission and Return to Founding Values

Although financial concerns often triggered the decision to convert, many schools also presented their move in terms of ethos and values. For these schools, joining the state sector was seen as a way to return to their founding vision: to educate a broad cross-section of society, rather than only those who could afford fees.

Liverpool College made this argument strongly. Hans Broekman described the school's original mission as providing "an education to everyone in Liverpool," including adult literacy classes.<sup>50</sup> Consequently, he characterised the independent-state conversion as a return to this inclusive purpose: "They didn't have in mind that it would become open only to some tiny group that could afford... [the] school fees."<sup>51</sup> Removing fees allowed the school to broaden its intake and reconnect with its founding mission. As Mr Broekman put it, this shift helped the school "make the case that this would improve and drive social mobility in Liverpool."<sup>52</sup>

Polam Hall School also cited its history, describing itself as "rooted in the values of our Quaker founders and 165 years of providing non-selective education."<sup>53</sup> In its free school application, the school said the conversion would help raise academic standards and "close the achievement gap at all levels."<sup>54</sup> Other schools used similar language. Grindon Hall Christian School said its aim was to "remove the barrier of fees which prevents so many local families from accessing such an education."<sup>55</sup> Queen Elizabeth's Grammar School in Blackburn described their conversion as an opportunity to offer "excellence" to children from low-income backgrounds.<sup>56</sup> Maharishi School stated that while it had been fee-paying "by necessity," its "core vision" had always been to serve the wider community.<sup>57</sup> Langdale School hoped to extend its "high standards, family values, ethos and aspirations... regardless of financial circumstances."<sup>58</sup> Although not specifically about social mission, elements of community building were also used as motivations for moving to the state sector. In rural areas, schools such as St Mary's Primary School in Dilwyn and Langdale School in Blackpool framed conversion as a way to preserve local identity and shape the broader education offer. St Mary's stated that joining the state sector would "preserve the social cohesion of our strong and united village community."<sup>59</sup> These concepts of identity were also evident for Peaslake School, which stated that it is "run for the community by the community."<sup>60</sup> Other schools used localised justifications for their conversions. For example, Langdale School stated that they hoped converting to a free school would "spur other schools... to further improve their own standards,"<sup>61</sup> while Bradford Girls' Grammar School stated that it was meeting an "urgent need for more primary and secondary school places in Bradford" through converting.<sup>62</sup> Notwithstanding the justifications put forward by these schools, their conversions were not always straightforward – the next chapter examines the obstacles they often faced in practice.

50 Lauren Shirreff, 'How to Convert a School from Private to State, According to a Trailblazing Headmaster', *The Telegraph*, 9 July 2024.

51 Ibid.

52 Ibid.

53 Department for Education, 'free school Application Form: Polam Hall School (Wave 6)', 2.

54 Ibid.

55 Department for Education, 'free school Application Form: Grindon Hall Christian School (Wave 2)', 3.

56 Department for Education, 'free school Application Form: Queen Elizabeth's Grammar School (Wave 4)', 2014, 12.

57 Department for Education, 'free school Application Form: Maharishi School of the Age of Enlightenment (Wave 1)', 7.

58 Department for Education, 'free school Application Form: Langdale Preparatory School (Wave 3)', 2013, 23.

59 Department for Education, 'free school Application Form: St Mary's Primary School (Wave 3)', 2012, 12.

60 Department for Education, 'free school Application Form: Peaslake School (Wave 3)'.

61 Department for Education, 'free school Application Form: Langdale Preparatory School (Wave 3)', 2.

62 Department for Education, 'free school Application Form: Bradford Girls' Grammar School (Wave 3)', 2013, 22.

## 4. Obstacles that Independent Schools Have Encountered During Their Conversions

Even if an independent school decided to convert into a state school, that only marked the start of a lengthy process. This chapter describes several potential barriers that could hamper or even prevent a successful conversion, along with assessing the implications of these barriers for the converting schools.

### 4.1. Reactions From Local Stakeholders

Gauging how parents, local councils and nearby schools responded to an independent school choosing to switch to the state sector is not straightforward because there were no attempts to capture their perspectives through official surveys or interviews. Even so, media articles published before and during the conversions provide some insights into the views of different stakeholders, as do the applications submitted by independent schools that elected to convert via the free schools route.

One way to assess the reaction from parents is through the consultations that many independent schools ran as part of the conversion process. When the King's School announced a merger with the neighbouring Priory Primary School as part of its conversion into a state school, it was reported that of the 324 responses from Priory parents and staff, 306 supported becoming an academy, 7 were against and 11 had no preference. Meanwhile, 251 out of 303 responses from King's parents were supportive, with 26 against and 26 having no preference.<sup>63</sup> When Liverpool College ran a similar consultation, Hans Broekman said that two-thirds of parents were “strongly in favour and 22-23 per cent were agnostic”, while only 10 per cent “would rather we had not done this”.<sup>64</sup>

In terms of parents' subsequent actions, there does not appear to be much evidence of pupils being removed because of an independent school's conversion. Mr Broekman said “only two parents have withdrawn their children” after Liverpool College chose to convert.<sup>65</sup> When the Belvedere School – also in Liverpool – became one of the first independent schools to join the state sector as an academy, “only a couple of families withdrew their daughters.”<sup>66</sup> At William Hulme's Grammar School (another early converter alongside Belvedere School) the then principal said that just four junior pupils “were removed in protest” but “the majority were quickly won round.”<sup>67</sup>

In terms of the impact on parents of an independent school becoming a state school, the most obvious change was the disappearance of fees for attending what many parents believed to be a desirable school. After Bradford Girls' Grammar School announced its decision to switch to the state sector, one parent told the BBC that not having to pay fees now gave her an opportunity “to think about university” for her children as “it feels like a windfall”.<sup>68</sup>

63 Pat Ashworth, 'Education: At the Start of a Long Climb', *Church Times*, 20 September 2013.

64 Richard Garner, 'Private College Cuts Its Old-School Ties', *The Independent*, 8 June 2013.

65 Ibid.

66 Chloe Stothart, 'Now, Young Ladies, We've Become an Academy', *Times Educational Supplement*, 19 December 2008.

67 James Morrison, 'Independents Go All-Inclusive', *The Independent*, 4 October 2007.

68 BBC News online, 'Bradford Girls Grammar School to Join State Sector', 7 December 2011.

Similarly, in the case of the King's School – Priory Primary conversion, a parent told the BBC that "Tynemouth has always been an aspirational place to live, but this will make it even more desirable and for me, that can only be positive."<sup>69</sup>

An additional source of evidence is the applications made by independent schools converting as a free school, as they were required to provide evidence of 'parental demand':

- Batley Grammar School asked parents if they intended to keep their child in the school, and 97.9 per cent said they would do so;<sup>70</sup>
- Cramlington Village Primary School reported that "we are able to demonstrate clearly that we have double the demand for our intended enrolment for at least the first two years of operation";<sup>71</sup>
- Bradford Girls' Grammar School said their 'Evidence of Demand' questionnaires included 1,495 children of school age, 978 of whom were not currently on roll but would be eligible to attend;<sup>72</sup>
- Chetwynde School claimed that parents of 1,125 children would select it as their first choice of school for their children – leading to an oversubscription of around 400 per cent for younger year groups.<sup>73</sup>

Although it became an academy rather than a free school, Liverpool College also "experienced severe oversubscription since its decision to convert to academy status".<sup>74</sup> After the College announced in 2012 that it would convert to an academy in 2013, their 2013 entry figures recorded 288 applications for 50 places in Reception with 158 first preferences, and 500 applications for Year 7 for 61 places with 221 first preferences. Applications for Reception and Year 7 both subsequently increased in 2014 and then again in 2015.<sup>75</sup>

Despite these seemingly positive figures, it would be wrong to assume that independent schools converting to state schools were always welcomed by local stakeholders. Parents have occasionally raised concerns about the impact that the conversion would have on the school. The Sunday Times reported that at Belvedere School, some parents were "horrified", with one saying she was "appalled" and "feared the school's ethos and standards would be eroded".<sup>76</sup> The then principal at William Hulme's Grammar School conceded that "a few parents were worried about the school admitting children from the wrong side of the tracks".<sup>77</sup> Some parents at King's School were concerned that the "close, family atmosphere built on tradition" would be "blown out the water" if the school got bigger after the conversion.<sup>78</sup> Another parent, who removed her daughter from Priory Primary after the merger and conversion was announced, said it was "not a good thing – especially if the state school is being used to prop up a school that's failing to recruit enough students" because "it's going to be damaging to the local nursery and to the local high schools. It's not happening in a vacuum.

69 BBC News online, 'The King's School to Merge with State-Funded Primary', 11 September 2012.

70 Department for Education, *free schools Proposal Form: Batley Grammar School – Resubmission*, 2010.

71 Department for Education, *Wave 2: Cramlington Village Primary School*, 2014.

72 Department for Education, *Bradford Girls' Grammar School: Application to Become a free school from September 2013*, 2014.

73 Department for Education, *Chetwynde School: free schools in 2014 – Application Form*, 2015.

74 Liverpool College, *Sizing the College Right for Our Future*, 2015, 1.

75 Ibid.

76 Griffiths, Sian, 'Education: The First Private Convert to the City Academy Cause', *The Sunday Times*, 13 November 2005.

77 Morrison, 'Independents Go All-Inclusive'.

78 BBC News online, 'The King's School to Merge with State-Funded Primary'.

There will be repercussions for the community.”<sup>79</sup> The potential impact of former independent schools on nearby state schools was a noticeable source of tension at the King’s School – Priory Primary conversion. As part of the school’s consultation on the conversion, all but one of the 20 local primary schools that responded were against the proposal, as were all nine of the local middle- and high-schools that responded. In addition, North Tyneside council, local teacher organisations and diocesan boards of education were against the proposal because they felt there were already surplus places in the area, so the introduction of new places would have a detrimental effect on other schools.<sup>80</sup> Despite opposing the merger over fears of the knock-on effect on nearby schools, North Tyneside council “reluctantly voted” not to pursue a judicial review in order to prevent further uncertainty for families.<sup>81</sup>

That is not to say every local council has opposed independent schools moving into the state sector. The then leader of Trafford Council was “fully supportive of the proposal by North Cestrian Grammar School to convert to free school status and move into the state funded sector.”<sup>82</sup> In contrast, when a state-funded Steiner academy was proposed to replace a private fee-charging Steiner school in the same village, the then leader of Herefordshire Council told government ministers they saw “no case for the academy on educational grounds”.<sup>83</sup> What’s more, the cost of the new Steiner academy – £16 million for a new building for 330 children – was questioned, particularly when other state schools in Herefordshire were being closed. The use of taxpayers’ money to support conversions into the state sector was also challenged when Batley Grammar School became a free school because nearby state schools were seeing their funding for new buildings dramatically reduced after the ‘Building Schools for the Future’ programme was closed by the Coalition Government. After losing out on £19 million in government funding for their buildings, the then headteacher of Batley Girls High School said that “it feels wrong to take from the poor to give to the relatively rich”.<sup>84</sup>

Although staff in nearby schools sometimes voiced their opposition to the conversion of an independent school, there was no formal attempt by the DfE or converting schools to capture the views of an independent school’s own teaching staff. Shortly after Belvedere School had converted to an academy, it was reported that some staff had been “nervous about learning the national curriculum, grappling with Ofsted and mixed-ability groups”, which had led to six staff taking early retirement and one leaving. In addition, “a few teachers who were new to [the National Curriculum] struggled at first, but most were keen to learn.”<sup>85</sup> Beyond such limited anecdotes, though, it is not clear to what extent existing staff at an independent school were supportive of their conversions.

79 Harriet Swain, ‘When Private Schools Become Academies’, *The Guardian*, 17 September 2012.

80 Ashworth, ‘Education: At the Start of a Long Climb’.

81 BBC News online, ‘No Legal Challenge to King’s and Priory Schools Merger’, 6 August 2013.

82 Messenger Newspapers, ‘North Cestrian Launches First “free school” Application in Trafford’, 29 January 2014.

83 Francis Beckett, ‘Protests over Plans for New Steiner Academy’, *The Guardian*, 10 March 2008.

84 Sara Gaines, ‘Private Schools Line up to Become Free’, *The Guardian*, 12 April 2011.

85 Chloe Stothart, ‘Now, Young Ladies, We’ve Become an Academy’, *Times Educational Supplement*, 19 December 2008.

## 4.2. The Loss of Selective Admissions

Independent schools can – and typically do – use entrance exams (e.g. English, maths, verbal reasoning and non-verbal reasoning) to select the pupils that they wish to admit, with some schools also setting additional criteria and/or assessments such as musical aptitude. However, selecting pupils by academic ability is prohibited in state-funded schools (except for grammar schools, partially selective schools and school sixth forms).<sup>86</sup> Consequently, an independent school switching into the state sector may have to radically alter the way that they admit pupils.

In 2011, media reports suggested that allowing independent schools to continue selecting pupils by academic ability if they switched to the state sector was “under consideration” by the Coalition Government, although this was denied by a government spokesperson. Neil Roskilly, then Chief Executive of the Independent Schools Association (ISA), which represented 300 fee-paying schools, said that only the most ‘financially challenged’ independent schools would take up any offer from the government to switch into the state sector, even if academic selection was permitted. That said, a survey of ISA members found that nearly 11 per cent would move into the state sector if they were allowed to continue to select.<sup>87</sup> Hans Broekman later added that “if it’s possible to be selective, I think for a lot of independent schools it’s going to be very attractive.”<sup>88</sup>

Given the number of independent schools that have converted to the state sector, the loss of selective admissions has clearly not proved to be a barrier in all cases. This may have been aided by the fact that the School Admissions Code for state-funded schools offers a small amount of flexibility over admissions policies:

- **Banding:** state schools are allowed to use ‘fair banding’ to “ensure that the intake for a school includes a proportionate spread of children of different abilities” by using pupils’ scores on an entrance test. The scores achieved by applicants on the test are used to separate them into ‘bands’, and the school then selects which applicants to admit in order to produce an intake that is representative of either: a) the full range of ability of applicants; b) the range of ability of children in the local area; or c) the national ability range.<sup>89</sup> Banding is now used by former independent schools such as Bradford Girls’ Grammar School<sup>90</sup> and the Belvedere Academy.<sup>91</sup>
- **Selection by aptitude:** state schools can select up to 10 per cent of their total pupil intake on the basis of a pupil’s ‘aptitude’ in one of five ‘specialist subjects’: a) physical education, or one or more sports; b) one or more performing arts; c) one or more visual arts; d) any chosen language; and e) design and technology and information technology.<sup>92</sup> A music specialism has proved popular among former independent schools, with Belvedere Academy,<sup>93</sup> Bristol Cathedral

86 Department for Education, *School Admissions Code*, 2021, 11.

87 Daniel Boffey, ‘Michael Gove Accused of Seeking Selection in State Schools’, *The Observer*, 17 December 2011.

88 Jess Staufenberg, ‘EXCLUSIVE: 97 Independent Schools Failed Test to Convert to free schools’, *Schools Week*, 30 September 2016.

89 Department for Education, *School Admissions Code*, 14.

90 Bradford Girls’ Grammar School, *Admissions Policy - Entry September 2025* (Bradford: BDAT, 2024).

91 The Belvedere Academy, ‘Year 7 Admissions’, Webpage, 2025.

92 Department for Education, *School Admissions Code*, 14.

93 The Belvedere Academy, ‘Year 7 Admissions’.

Choir School<sup>94</sup> and Birkenhead High School Academy<sup>95</sup> all utilising this option. In addition, Sandbach School has a specialism in sport<sup>96</sup> and William Hulme's Grammar School has a modern languages specialism.<sup>97</sup>

Although none of these arrangements come close to replicating the large-scale academic selection used by many independent schools, they suggest that former independent schools have in some cases found a way to maintain their previous ethos within the context of state school admissions policies.

### 4.3. The Lack of Support and Advice for Converting Schools

One of the most consistent themes raised in the research interviews for this report was the absence of any formal support or guidance for independent schools that wished to move into the state sector, either as an academy or as a free school. Arguably, this situation was hard to avoid given that so few schools have ever made the transition from independent to state school, making it difficult to collate the most valuable information for converting schools. Our interviews suggested that many conversations took place between these schools and the DfE – especially for those that converted in the late 2000s – as well as between converting schools and other schools that had already made the switch, but this fell well short of a centralised portal for advising and guiding schools from their initial proposal through to the completion of the process.

As noted earlier in this report, the DCSF published a prospectus in 2007 that, among other things, encouraged independent schools to convert to academies. The prospectus noted that the DCSF would “tailor the procedures to match as closely as possible the needs of different types of academy project”.<sup>98</sup> Such tailoring was almost inevitable given how little prior experience the DCSF had with these conversions. Nevertheless, this piecemeal approach meant there were no guarantees about how much support an independent school would receive, and many converting schools were left in the dark on a range of crucial issues.

Interviews for this report uncovered several matters that converting independent schools had to deal with, many of which required a significant investment of time and/or money. For example, finalising a funding agreement with the DfE – a legally binding contract – would have been an unknown quantity for converting schools that had little or no experience of operating in the public sector. The agreements used by the DfE have also changed over time, meaning that former independent schools are likely to have signed different agreements depending on the academic year in which they converted. This is one reason why converting schools often had to buy in legal advice to navigate their new contractual obligations. In addition, moving teaching and non-teaching staff from the private to the public sector was another crucial process, with Transfer of Undertakings (Protection of Employment) (TUPE) Regulations being an important consideration.

94 Bristol Cathedral Choir School, ‘Music Specialism – Year 7 Admissions – September 2025’, Webpage, 2025.

95 Birkenhead High School Academy, ‘Year 7 Admissions’, Webpage, 2025.

96 Sandbach School, ‘Admissions’, Webpage, 2025.

97 William Hulme's Grammar School, ‘Admissions Policy: Criteria’, Webpage, 2025.

98 Ibid., 14.

Clare Gammon, headteacher at Queen Elizabeth's Grammar School, told *The Guardian* in 2020 that there had to be a:

*"...mentoring system between schools that have already converted and those that want to make the change. There are massive fears in independent schools. You have been in a bubble, running your own domain. And you are going into a very different system, it can feel like a loss of power."<sup>99</sup>*

More specifically, Ms Gammon said that converting schools needed support with matters such as financial planning and grant applications. Meanwhile, Kate Reid, headteacher at Polam Hall School, had previously worked at Liverpool College and had therefore already seen the conversion process up close. Even so, she observed that:

*"Schools need advice and guidance that they can trust. When I got to Polam Hall I looked at their files and saw the conflicting advice that the school had been given, including from those representing the DfE. Staff members told me that they were led to believe that funding would enable the school to have just 20 children in a class. But anyone who knows about state school funding would know that was never going to work."<sup>100</sup>*

To provide this advice and guidance to converting schools, Hans Broekman has previously called on the Government to set up a special unit "empowered to transfer independent schools to the state sector",<sup>101</sup> but this has never been implemented.

The difficulty in providing support to converting independent schools may have been exacerbated by the fact that 9 of the 24 former independent schools that remain open today converted to academies (including the first seven converters from 2007 to 2010), whereas the other 15 opened as free schools. The free school route was used to establish new state schools under the Coalition Government and came with a formal DfE application process and criteria for approval, whereas, as noted above, converting to an academy was a less defined option that resulted in each school largely being dealt with on a case-by-case basis. This divergence made it harder to learn lessons regarding the best approach to conversions because former independent schools were having very different experiences, with even the free schools route evolving after it was first established following the 2010 General Election. Furthermore, the free schools route was a more publicly visible option for conversion that involved applications being published online along with having to prove 'parental demand' and hold consultations, which generated more opportunities for stakeholders to raise concerns. In contrast, converting to an academy generally took place behind closed doors and gave the leadership team and governors an opportunity to develop and implement their conversion plans in private.

99 Melissa Benn, "Only a Zealot Would Oppose": Should the UK Nationalise Struggling Private Schools?," *The Guardian*, 18 July 2020.

100 Ibid.

101 Ibid.

## 4.4. Increased Expectations and Requirements

The independent and state sectors come with different views on what is expected of schools, particularly in terms of their respective curriculum, assessment and accountability systems. Most obviously, state schools face a range of external checks such as several statutory assessments as well as Ofsted inspections that come with detailed inspection frameworks and significant consequences for underperforming schools. The National Curriculum also only applies to state-funded schools, as do performance measures such as 'Progress 8' and 'Attainment 8' that are based on pupils' exam results at age 16. Moreover, there are important cultural and logistical differences between the independent and state sectors. The absence of academic selection in almost every state school means that they typically educate a much broader range of pupils than selective independent schools in terms of pupils' prior attainment. The considerable variations in curriculum, assessment and accountability between the two sectors in addition to the different rules and regulations around school finances also have implications for state school leaders and governors, who are generally responsible for overseeing the performance and financial health of each school.

Judging by the outcomes achieved by converting independent schools in their first Ofsted inspections (discussed in more detail in the next chapter), many leadership teams were able to navigate the different expectations surrounding state schools. Even so, the initial Ofsted reports suggest that some independent schools struggled, at least to begin with, as they grappled with these new and more onerous requirements. The following anonymised quotations, grouped into two broad categories, are taken from the Ofsted reports of the nine former independent schools that received an overall judgement of 'Requires Improvement' (the second lowest of the four ratings) in their first inspection after conversion:

### Weaknesses in monitoring and supporting pupils

- *"The school has had an over-generous view of its performance. Plans for improvement are not sharply focused on addressing areas for improvement. As a result, the school has not acted swiftly enough to tackle some areas of weakness"*
- *"When the Free school opened, leaders and governors lacked data about pupils' performance. As a result, target-setting and checks on progress were not fit for purpose"*
- *"Overall, the school's improvement has been slow. Senior leaders are unclear about how well current pupils are achieving. Their system of monitoring pupils' progress is based on inaccurate information. Most leaders do not have the skills to interrogate and analyse the information they do have."*
- *"Systems for checking pupils' achievement across the whole school do not provide a clear enough picture of pupils' progress in English and mathematics."*
- *"Too few teachers take into account pupils' abilities and prior learning when planning lessons. Some teachers do not plan to cover the requirements of the curriculum."*
- *"[Too many] aspects of the school's performance are evaluated without sufficient accuracy, careful analysis and evaluation. Consequently, school improvement is patchy."*

## Insufficient leadership and governance capabilities

- *“Despite the rapid progress made by senior leaders and governors in developing their skills and competencies ... they do not yet have a robust and well-evidenced overview of the impact that aspects of the school’s work have on raising standards.”*
- *“The collection, analysis and use of on-going information about the progress of the school, in all areas of its work, are not being accurately or fully used by senior leaders and governors to drive improvement.”*
- *“Governors do not systematically check the impact of leaders’ actions to drive school improvement, particularly regarding the progress of groups of pupils.”*
- *“Leaders do not have effective systems in place to ensure that the much needed actions to improve teaching and pupils’ achievement can be implemented swiftly.”*
- *“Governors have insufficient oversight of safeguarding, recruitment, the quality of teaching and the curriculum. They are not in a position to ensure that urgent and rapid improvement occurs”*
- *“Checks made by senior leaders, including governors, do not always focus clearly on the impact of teaching on pupils’ achievement.”*

Although these issues are by no means restricted to converting independent schools, they illustrate some of the challenges that leadership teams have faced. Some schools have encountered other challenges related to the increased expectations around state-funded education. For example, following a ‘monitoring inspection’ shortly after its conversion, Ofsted reported that one school’s premises was “presenting some management difficulties ...including some aspects of site safety and security which require improving” – a situation that appeared to be resolved before subsequent inspections took place. Another former independent school was criticised by Ofsted because its recruitment procedures were “lax” as “many appointments are made without fair and open competition”. Despite a handful of converting schools facing such issues, the evidence in the next chapter suggests that most former independent schools have successfully transitioned into the state sector.

## 5. The Performance and Profile of Former Independent Schools After They Converted to State Schools

As the previous chapter noted, some independent schools struggled to adapt to life in the state sector. If these struggles continued, former independent schools may have ended up performing poorly in terms of academic outcomes. However, analysing the impact that moving into the state sector has on the performance of a former independent school is complicated for several reasons. First and foremost, the two sectors have different testing and inspection systems. For example, there are several statutory assessments that state-funded primary schools must deliver such as SATs at age 11, yet independent primary schools can ignore these assessments altogether. Mainstream state-funded secondary schools almost invariably enter their pupils for GCSEs at age 16 whereas this is not always the case for independent schools, and independent schools are not obliged to publish their pupils' results in any case. Moreover, the outcomes of inspections conducted by Ofsted and the Independent School Inspectorate (ISI) are not directly comparable (particularly as schools inspected by the ISI do not receive an overall grade) even though the inspections can cover similar ground.

Nonetheless, there are some performance measures that allow for high-level comparisons between former independent schools and other state schools, and these measures will be the focus of this chapter.

### 5.1. Performance in Primary Education

This report has identified 14 former independent schools that currently educate primary-aged pupils in the state sector and have performance data based on statutory assessments.

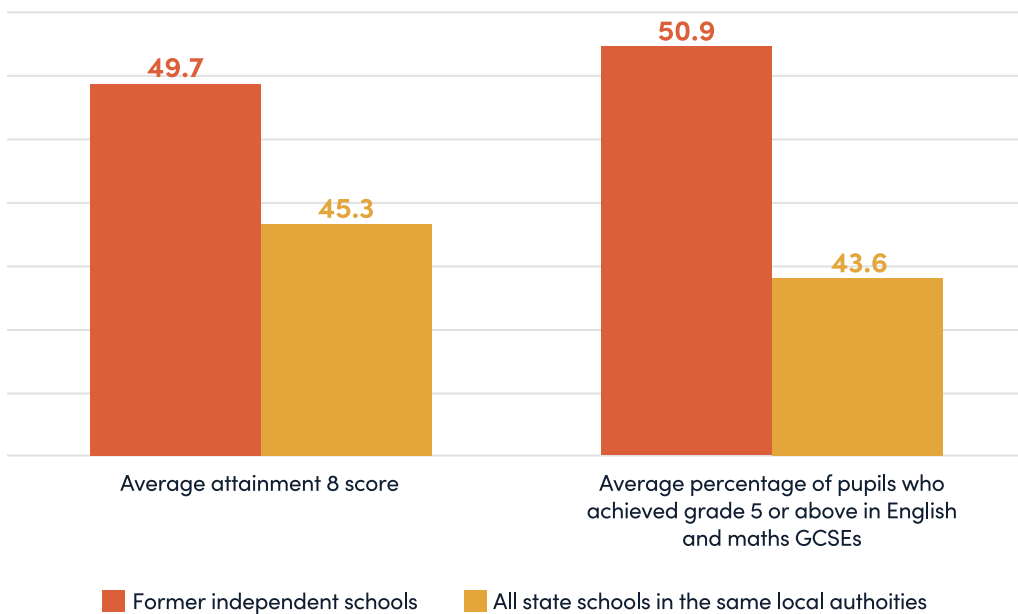
The main headline measure of primary school performance in England is the percentage of pupils achieving the 'expected standard' in reading, writing and maths at the end of Key Stage 2 (age 11). In 2024/25, former independent schools had an average of 67.9 per cent of pupils reaching this benchmark compared to 60.2 per cent of all pupils attending state-funded schools located in the same local authorities (the national average was 62 per cent). Bearing in mind that 9 of the 14 former independent schools were above their local authority average and 5 of the 14 scored below it, there appears to be a small but not necessarily significant advantage of former independent primary schools over nearby state schools on this measure.

### 5.2. Performance in Secondary Education

This report has identified 20 former independent schools that educate secondary-aged pupils in the state sector and have performance data based on pupils' results in their SATs at age 11 and GCSEs or equivalent qualifications at age 16.

Of the headline measures for secondary school performance in England, the two that most closely resemble the primary school measure described above are: (i) Attainment 8 (a score based on how well pupils have performed in up to eight qualifications at age 16); and (ii) the percentage of pupils who achieved grade 5 or above in English and maths GCSEs. Attainment 8 has a maximum point score of 90 for each pupil, with a national average score of 45.9 in 2024/25.<sup>102</sup> As shown in Figure 2, pupils at former independent schools achieved better overall examination results (higher Attainment 8 scores) at age 16, and only 6 out of the 20 schools performed below their local authority average on this measure. Similarly, pupils at former independent schools generally outperformed their local authority average in terms of GCSE English and maths results, with only 7 of the 20 schools falling below it (the national average was 45.2 per cent in 2024/25).<sup>103</sup>

**Figure 2: the performance of pupils in former independent schools compared to all pupils in state-funded schools in the same local authorities**



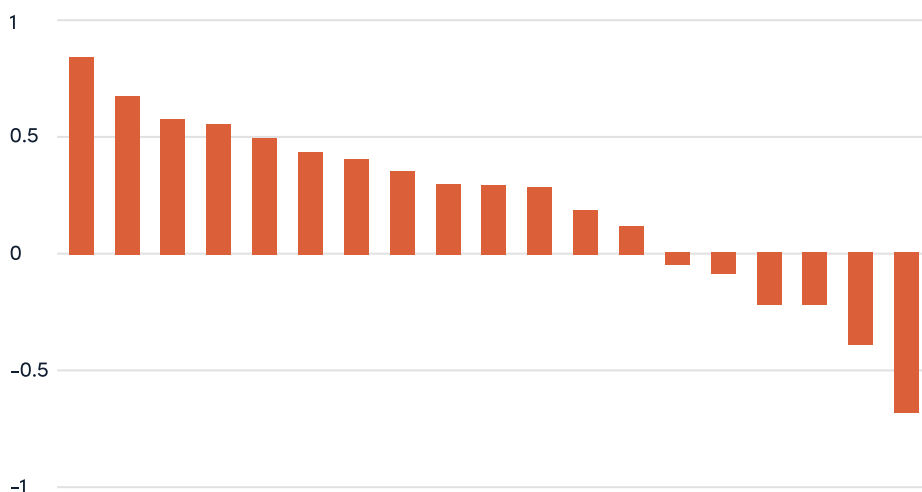
Another performance measure for state-funded secondary schools is Progress 8, which measures the academic progress that pupils make from the end of Key Stage 2 to the end of Key Stage 4 (age 16) based on the same eight qualifications used to calculate Attainment 8. As a result, Progress 8 is a more useful performance measure than Attainment 8 because it takes into account the starting point of each pupil at age 11 as well as their examination results at age 16, as opposed to Attainment 8 that simply looks at results at age 16. The national average for Progress 8 is 0, with most schools scoring slightly above or below 0. To give a sense of scale, a score of +1 would mean that, on average, pupils at a school score one grade higher in every subject at age 16 compared to pupils attending other schools who achieved the same SAT results at age 11. Conversely, a score of -1 would mean that, on average, pupils at a school score one grade lower in every subject at age 16 compared to similar pupils in other state schools.

<sup>102</sup> Department for Education, 'Academic Year 2024/25: Key Stage 4 Performance', Webpage, 2025.

<sup>103</sup> Department for Education, 'Academic Year 2024/25: Key Stage 4 Performance', Webpage, 2025.

As Progress 8 was only introduced in 2014 it is not possible to use it to track the performance of all former independent schools from the point at which they converted but it nevertheless offers valuable insights. Using the latest available data (2023/24), the average Progress 8 score for former independent schools was +0.2, putting them slightly above the national average as a group.<sup>104</sup> Figure 3 shows that two-thirds of former independent schools scored above the national average of 0, some by a considerable margin, while six schools were below the national average.

**Figure 3: the Progress 8 scores of former independent schools educating secondary-aged pupils in the state sector (ranked from highest to lowest)**



### 5.3. Ofsted Inspection Outcomes

Leaving aside examination performance, another way to assess the impact of converting into the state sector is to look at the outcomes of Ofsted inspections. Although the precise nature and content of Ofsted inspections has changed over time, the outcomes offer a useful way to analyse how well former independent schools have adjusted to the demands of state-funded education.<sup>105</sup>

Figure 4 supports what was highlighted in the previous chapter, namely that some independent schools initially found it hard to adjust to what was expected of them within the state school system. 9 out of 24 schools were judged as ‘Requires Improvement’ in their first Ofsted inspection after conversion.<sup>106</sup> However, over time this picture has changed considerably. At the time of writing, all but one of the former independent schools are now rated as ‘Outstanding’ or ‘Good’ at their most recent Ofsted inspection compared to 90 per cent of all state schools in England.<sup>107</sup> Only three independent schools have ever been judged as ‘Inadequate’ and two of those were rated ‘Good’ in their latest inspection, with the other having transferred in September 2024 to a new academy trust.

<sup>104</sup> This analysis of Progress 8 scores excludes the results for The Steiner Academy Hereford because pupils do not sit SATs exams at age 11, meaning that the baseline for calculating Progress 8 is not comparable to other state schools.

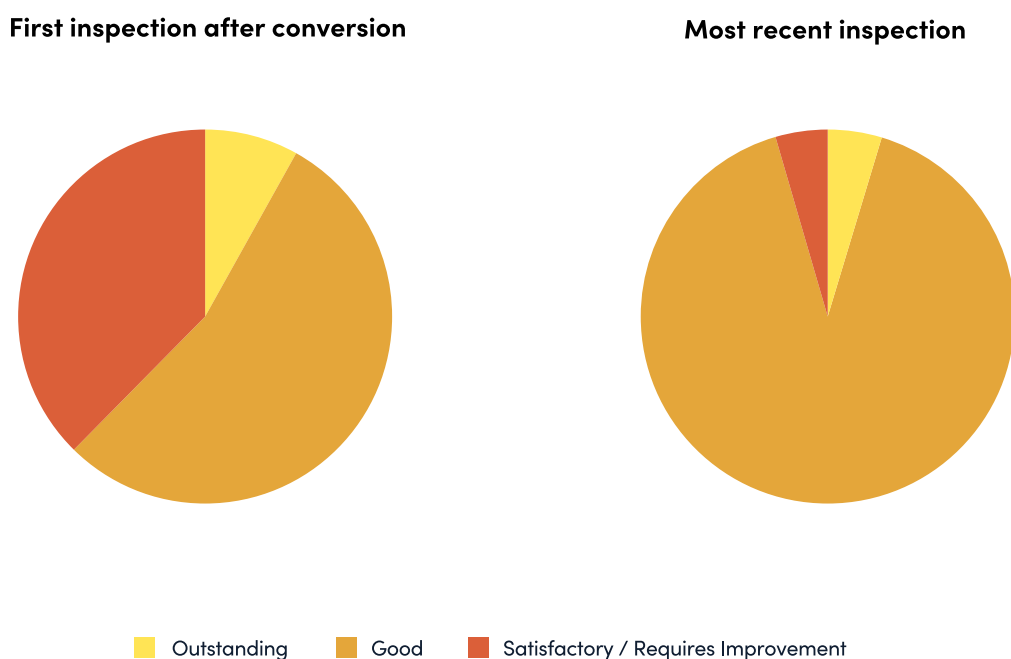
<sup>105</sup> Montpelier High School has recently become E-ACT Montpelier High School, meaning that it no longer has an official Ofsted rating and is therefore excluded from the above analysis of Ofsted grades including the ‘Most recent inspection’ graphic in Figure 4.

<sup>106</sup> This includes one school that was judged to be ‘Satisfactory’ under a previous grading system.

<sup>107</sup> Data collected from Ofsted’s ‘Find an inspection report’ webpage. Any school inspected since the start of 2024 has not received an overall inspection grade, in which case this analysis used the most common judgement made among the different sub-judgements.

Overall, the trend is one of substantial improvements over the past decade or so as these former independent schools became more accustomed to life in the state sector.

**Figure 4: the outcomes of Ofsted inspections for former independent schools**



## 5.4. The Profile of Pupils

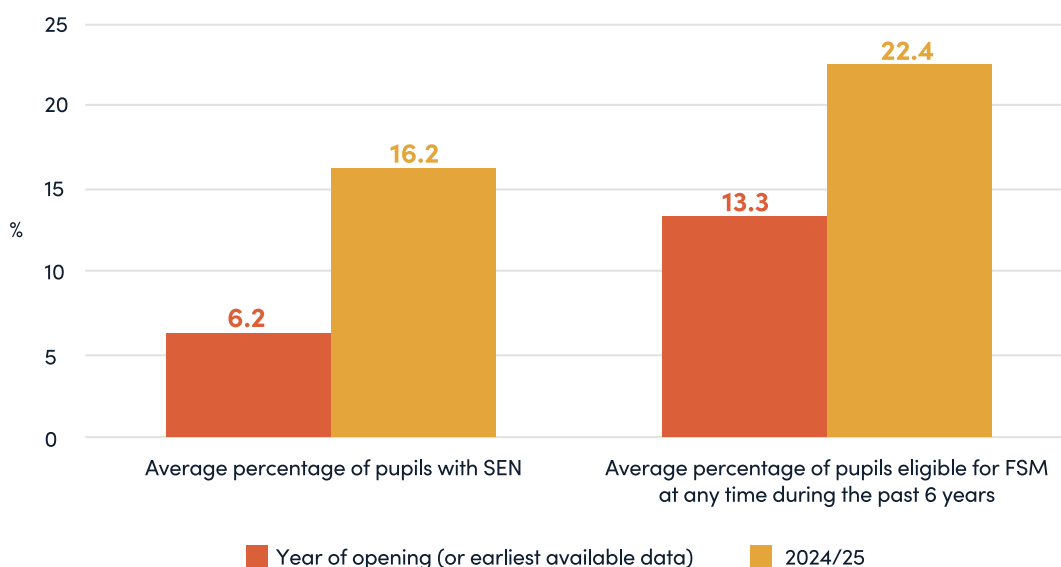
Even if former independent schools are performing at a high level, this still leaves the question of whether the intake of pupils at these schools has become more representative of nearby schools and communities after moving into the state sector. For all 24 independent schools that have become academies or free schools, it is possible to assess whether their percentage of pupils who are or have been eligible for free school meals (FSM; due to low parental income) or have been classified as having Special Educational Needs (SEN)<sup>108</sup> has changed since the conversion.<sup>109</sup>

Figure 5 shows what has happened to the pupil profile of these independent schools since they joined the state sector. The proportion of pupils with SEN has more than doubled since these schools converted. Only one school has seen their proportion of SEN pupils decrease over that period, while 16 of the 24 schools have had their proportion increase by over 10 percentage points. At the same time, the proportion of FSM pupils at these former independent schools is now almost 70 per cent higher than it was when they converted. Only two schools have seen their proportion of FSM pupils decrease while eight have seen a rise of over 10 percentage points.

<sup>108</sup> As the definitions of Special Educational Needs has changed over time, this analysis includes pupils classified as having SEN statement or action plan under the previous system, or pupils who have an Education, Health and Care Plan or SEN support under the current system.

<sup>109</sup> Comparable data on both FSM and SEN percentages only extends back to 2011/12. Data for the six schools that converted into the state sector from 2007/08 to 2010/11 is therefore analysed as if it began in 2011/12.

**Figure 5: changes in the profile of pupils since conversion in the 24 independent schools that opened as academies or free schools in the state sector**



In both cases the trend is a positive one, although there remains a small gap between these figures for former independent schools and the mainstream state school population as a whole. For the proportion of FSM pupils the national average is approximately 27 per cent for state-funded schools,<sup>110</sup> whereas for SEN pupils the national average is around 17 per cent.<sup>111</sup> Regardless, this analysis shows that, since they converted into the state sector, these former independent schools have dramatically closed the gap on their state sector peers in terms of the profile of their pupils.

<sup>110</sup> Department for Education, 'Pupil Characteristics - Eligibility for FSM at Any Time during Past 6 Years', Webpage, 2025.

<sup>111</sup> Department for Education, 'Pupils in All Schools, by Type of SEN Provision for State-Funded Primary and State-Funded Secondary in England for 2024/25', Webpage, 2025.

## 6. Recommendations

This report began with the aim of building an evidence-based picture of the history and impact of mainstream independent schools converting into the state sector. Below is a summary of what the desk-based research and interviews carried out for this report have identified in terms of the most important elements of these past conversions:

- Only a small number of independent schools have ever switched to the state sector. Our report found 27 independent schools that had converted into academies or free schools – 24 of which remain open.
- There are various reasons why independent schools have chosen to convert. These include responding to a fall in pupil numbers due to demographic changes, a stated desire to return to their founding mission (which typically relate to being inclusive and supporting their local community) and difficulties coping with rising costs and/or demand for bursaries.
- Parents have generally been very supportive of independent schools moving into the state sector, not least because of the removal of fees. That said, other nearby state schools may have been inadvertently affected in some cases by the creation of more local school places.
- Converting schools have often reported lacking the necessary advice and guidance on how to operate within the state sector, particularly around financial management, governance and the increased requirements they face in relation to Ofsted inspections and delivering the National Curriculum.
- Despite the challenges faced by some schools as they switched from the independent to the state sector, these converted schools achieve comparable Ofsted ratings to other state schools. In terms of academic outcomes, former independent primary schools tend to perform at a similar level to other schools in the same local authority, whereas former independent secondary schools typically deliver better attainment and progress scores than nearby schools.
- The removal of academic selection has led to converting independent schools becoming much more representative of their local communities in terms of the proportion of pupils at the school who have a Special Educational Need or have claimed FSM.

The following recommendations are designed to reflect these nuanced findings in a way that draws the most important lessons from the experience accumulated over the past two decades.

**Recommendation 1: A permanent conversion route should be established by the Department for Education through which independent schools can convert to a state-funded school, as this would allow the Department to take advantage of any circumstances in which a conversion would benefit the state sector.**

Given the performance level achieved by former independent schools as well as the facilities and assets that these schools possess, the analysis in this report suggests that it is logical to allow other independent schools to follow the same conversion path in future.

The demographic shifts affecting independent and state schools mean that the number of pupils in both sectors is likely to decrease in the coming years, thus removing the need for extra state school places in many areas.

That said, the creation of a permanent conversion route for independent schools will give the DfE the option to allow conversions as and when the conditions suit the Government (and potentially other nearby state schools) rather than simply allowing independent schools to convert at will. Despite the reduced need for additional state school places at a system level, there may be some local circumstances that would support the case for converting a particular school, especially when the cost of converting an existing independent school is far lower than the cost of building a new school.

These circumstances could include the following scenarios:

- Some state schools may be struggling to access sufficient government funding to deal with unsafe or unsuitable buildings – for example, due to the historical use of reinforced autoclaved aerated concrete (Raac). 235 schools were identified as having used Raac, 119 of which needed to have one or more buildings rebuilt or refurbished as a result.<sup>112</sup> In some situations, it is conceivable that converting an independent school with spare capacity into a state school may be more cost-effective than rebuilding some or all of an affected state school.
- Due to falling pupil numbers, several schools in a local area may be becoming less viable with every academic year that passes. If a nearby independent school and state school both have spare capacity then it may be prudent to consider closing the state school and moving their pupils into the independent school as it converts to the state sector. This would give local pupils and parents access to what are likely to be superior facilities from the independent sector while making the one remaining (now state) school a more sustainable institution.
- The Government has set out a plan to create 100,000 new nursery places using spare capacity in English primary schools, yet one of the concerns with this policy is that the projected spare capacity is not necessarily in the right places to match projected demand.<sup>113</sup> By bringing some independent schools into the state sector in areas of high demand for nurseries, especially if those schools already have spare capacity, the Government could potentially increase the volume of new nursery places being made available.

<sup>112</sup> BBC News online, 'Raac Schools List of Buildings with Unsafe Concrete in England', 13 February 2024.

<sup>113</sup> Sally Weale, 'Labour Plan for 100,000 New Nursery Places in England "Unlikely to Work"', *The Guardian*, 19 November 2024.

Although such scenarios are speculative, they illustrate the value in having a formal conversion route in place so that, should the need arise in a specific location, independent schools could help the DfE achieve its goals in the state-funded education system.

## **Recommendation 2: the proposed permanent route should be based on the processes previously used by independent schools converting through the academies and free schools route**

The proposed new conversion route for independent schools will need to be carefully constructed to ensure that it reflects the more helpful elements of the processes used since 2007. The opportunity to protect their legal independence was one of the reasons that the academies and free schools routes were far more attractive to independent school converters than becoming a local authority maintained school. Even so, independent schools converting through the academies programme were treated differently to those converting as free schools, and both routes offer benefits and drawbacks depending on how a government wishes to approach future conversions. The three most important questions facing policymakers would be as follows:

- **Should the conversions be dealt with privately or publicly?**

Former independent schools that became academies, especially the first schools to use this route in the late 2000s and early 2010s, were generally able to discuss their conversions with the then DCSF in private. This allowed independent schools to confirm the viability of their conversion before discussing their plans with parents, pupils, local councils and other stakeholders. As a result, the conversion process was faster and more straightforward than it would otherwise have been. Keeping such discussions private also meant that the independent school's reputation would be unaffected if – for whatever reason – the conversion did not go ahead. However, these private discussions reduced the transparency around independent school conversions. In contrast, the free schools route was an open application process that came with no guarantees of success and generated a great deal of bureaucracy, yet offered no opportunities for behind-the-scenes discussions with government about an independent school's ambitions or plans.

- **Should the conversion process operate on a case-by-case basis or through a standardised process?**

As the DCSF recognised in the late 2000s, there was merit in dealing with each converting independent school on an individual basis because it allowed them to tailor the process to a given school's needs and challenges. The free schools process in subsequent years took a different approach by pushing converting schools through the same standardised process that used the same criteria to assess every application. A tailored approach would almost certainly be more effective from the perspective of the converting school and could potentially increase the chance of a successful conversion, whereas a standardised approach would presumably reduce the departmental resources required to convert independent schools relative to a tailored approach.

- **How much is government willing to invest in the conversion process? (e.g. debt write offs, investing in expansions / upgrades /alterations)**

Given the constraints on the public finances, the DfE would understandably be reticent to spend additional funds on a new scheme for converting independent schools into state schools. As discussed earlier in this report, it has sometimes been necessary to invest in such conversions – for example, expanding or redeveloping classrooms and facilities at former independent schools to get them ready to accommodate state school pupils, especially if the school was set to expand after conversion (which was a regular occurrence). However, any concerns over such investment should be weighed against the substantial cost of building an entirely new school or trying to renovate an existing state school in poor condition. Through this lens, such capital investment from government may seem prudent or even desirable.

### **Recommendation 3: the Department for Education should establish a ‘peer mentoring network’ through which former independent schools that have already converted into state schools can provide support and advice to newly converting schools**

The relatively small number of independent schools that have successfully converted will inevitably limit the amount of advice available. Nevertheless, this report has highlighted how converting schools were often left to fend for themselves with little advice and guidance from government about what the conversion process entails, the impact it will have on the school or how to deal with common obstacles and challenges before, during and after the conversion. These obstacles include delivering the National Curriculum, becoming familiar with Ofsted inspections and learning how to work with DfE funding rules and regulations – all of which require careful consideration by school management teams and governors.

To improve the level of support and advice available to independent schools as part of the conversion process, the DfE should create a ‘peer mentoring network’ that brings together former independent schools already in the state sector with independent schools that are either considering making the switch or have begun the conversion process. This network – made up of senior leaders from former independent schools – will, among other things, provide honest and candid advice to current independent schools as well as guidance on how to navigate the different stages of the conversion and prepare for life as a state-funded school. This network could complement the formal conversion process run by the DfE and would, at a very low cost to government, use the expertise and experience already gained by former independent schools to create a smoother, simpler and hopefully more successful process for future converters.

## Conclusion

*“In short, the [academies] programme establishes an opportunity to do something big, important, new and worthwhile in education, which benefits all those directly involved, contributing to the healthy development of our whole society.”<sup>114</sup>*

When the DCSF published their prospectus in 2007 outlining how independent schools could support or even become state schools, the then Labour Government was clearly enthusiastic about the potential impact of this initiative. Two decades later, such enthusiasm around the conversion of independent schools into the state sector is notable by its absence. Even so, the evidence presented in this report has shown that there are good reasons to lament the decline of these conversions, particularly if they are used in a targeted manner to provide a high-quality state-funded education to pupils from a wide range of backgrounds.

It would be unwise to draw definitive conclusions from the relatively small number of schools that have successfully switched from the independent to the state sector, for several reasons. First and foremost, the DCSF (and later the DfE) did not systematically collect information from converting schools on important issues such as a school’s experience of the conversion process or the views of staff, pupils and parents before and after the conversion. In addition, no formal goals were ever set by government for measuring the impact of conversions on either the schools or their pupils, meaning that any judgements on the ‘success’ of the conversions is open to interpretation. Regardless, this report has demonstrated that not only have former independent schools generally performed well in the state sector but they have done so while becoming more inclusive and representative of their local communities.

Although the relationship between the current government and the independent school sector has become strained following the decision to add VAT to fees and remove the schools’ charitable rates relief, it is noteworthy that the Government’s rationale for these changes was that they would help to create a stronger state education system. It is this same rationale that underpins this report’s desire to ensure that there is a conversion route available so that, when it is in the Government’s interests, an independent school could be allowed to convert into a state school. Given that many independent schools are likely to face significant financial pressures in the coming years, it is now arguably more important than ever that the Government once again gives these schools the chance to join the state sector.

<sup>114</sup> Department for Children, Schools and Families, *Academies & Independent Schools: Prospectus* (DCSF, 2007), 6, [https://dera.ioe.ac.uk/id/eprint/6578/7/Academies\\_Prospectus\\_Redacted.pdf](https://dera.ioe.ac.uk/id/eprint/6578/7/Academies_Prospectus_Redacted.pdf).

## Appendix 1: list of former independent schools that converted to academies or free schools

### Academies route

Academic year of conversion	Old School Name	New School Name	Size post-conversion <sup>115</sup>	Current size (2025 unless stated)	Region	Status
2007/2008	William Hulme's Grammar School	(no change)	870 (2008)	1611	North West	Open
2007/2008	The Belvedere School	The Belvedere Academy	660 (2010)	1106	North West	Open
2008/2009	Bristol Cathedral School	Bristol Cathedral Choir School	553 (2010)	1167	South West	Open
2008/2009	Hereford Waldorf School	The Steiner Academy Hereford	318 (2011)	343	West Midlands	Open
2008/2009	Colstons Girls' School	Montpelier High School	532 (2010)	906 (2024)	South West	Closed 2024
2009/2010	Birkenhead High School	Birkenhead High School Academy	842 (2012)	1202	North West	Open
2010/2011	Duke of York's Royal Military School	(no change)	438 (2012)	487	South East	Open
2013/2014	The King's School	Kings Priory School	1234 (2015)	1533	North East	Open
2013/2014	Liverpool College International	Liverpool College	1022 (2015)	1646	North West	Open

<sup>115</sup> Measured by data given in first full Ofsted report post-conversion.

## Appendix 1: list of former independent schools that converted to academies or free schools

### Free Schools Route

Academic year of conversion	Old School Name	New School Name	Size post-conversion <sup>116</sup>	Current size (2025 unless stated)	Region	Status
2011/2012	Batley Grammar School	(no change)	678 (2013)	1006	Yorkshire and the Humber	Open
2011/2012	The Priors School	(no change)	40 (2013)	100	West Midlands	Open
2011/2012	Sandbach School	(no change)	1217 (2013)	1507	North West	Open
2011/2012	Maharishi School of the Age of Enlightenment	Maharishi Free School	158 (2013)	230	North West	Open
2012/2013	Grindon Hall Christian School	Christ's College	541 (2014)	761	South East	Open
2012/2013	St Michael's Catholic Small School	St Michael's Secondary School	N/A	N/A	South West	Closed 2016
2012/2013	St Mary's Primary School, Dilwyn	(no change)	50 (2015)	77	West Midlands	Open
2012/2013	Cramlington Village Primary School	(no change)	58 (2014)	185	North East	Open
2013/2014	Bradford Girls' Grammar School	(no change)	877 (2015)	1041	Yorkshire and the Humber	Open
2013/2014	Peaslake School	Peaslake Free School	30 (2015)	32	South East	Open
2013/2014	St Anthony's Convent School	St Anthony's School	N/A	93 (2018)	South East	Closed 2018
2013/2014	Langdale Preparatory School	Langdale Free School	117 (2015)	97 (2023)	North West	Closed 2023

<sup>116</sup> Measured by data given in first full Ofsted report post-conversion.

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### Free Schools Route

2014/2015	Chetwynde School	(no change)	470 (2017)	506	North West	Open
2014/2015	Holy Trinity School	(no change)	540 (2017)	747	West Midlands	Open
2014/2015	Queen Elizabeth's Grammar School	(no change)	1041 (2017)	874	North West	Open
2015/2016	Polam Hall School	(no change)	722 (2018)	816	North East	Open
2016/2017	The Royal Wolverhampton School	The Royal School, Wolverhampton	1251 (2019)	1493	West Midlands	Open
2016/2017	North Cestrian Grammar School	North Cestrian School	514 (2019)	779	North West	Open