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|  | **Date/**  **Time Scale** | **Stages to Conversion** | **Action** | **Decision** | **Com-pleted** | **Lead Person** |
| 1a |  | **Due Diligence**  School Governing Body to gather information on available academy status options and to consider the possible implications of each option for the school. This process can be supported by the Diocesan Academies Adviser. Schools are advised to set up a **working group** to consider the pros/cons of becoming an academy and familiarise themselves with the process involved. This work should be reported back to the Full Governing Body. (NB see Academies Toolkit for further Guidance) | GB/Academy  Working Group  Discuss with School Effectiveness Adviser or School Org adviser. |  |  |  |
| 1b |  | Schools must seek **advice from the School Organisation Team** at the Diocese to discuss their thinking on conversion and options during the due diligence process.  Schools can invite the School Organisation Team to a Governing Body meeting for further discussion and advice, particularly where this is likely to develop into a firm proposal**. Voluntary Aided schools should seek advice at the earliest opportunity. (See toolkit)** | CofG/HT/Chair of Working Group  Contact Academies Adviser |  |  |  |
| 2 |  | The School Governing Body should make a **formally minuted decision** to register their interest in moving to academy status as part of a Multi-Academy Trust. Please **ensure the LA are informed of your plans.** | CofG  Contact LA | GB |  |  |
| 3 |  | **Obtaining MAT Approval**  Provide information to the MAT which will allow the MAT to give agreement in principle to the conversion – the MAT is likely to be particularly concerned about the school being a good geographical and education fit as well as the financial viability. They will also carefully consider the capacity of their MAT. A mintued decision will need to be made by the MAT Board of Trustees/Directors and in some cases by the Members e.g. if a change of articles is required. | GB/  School  MAT Directors and possibly Members. | MAT Directors/Trustees |  |  |
| 4 |  | **Obtaining DBE Conditional Consent**  The GB fills in the **‘Application form for Conditional Consent’**  to join their chosen MAT. GB to include supporting information obtained during the due diligence process.  Form available on B&W Website. <http://www.bathandwells.org.uk/supporting-children/school-organisation/academies/> | GB/  School | DBE |  |  |
|  | **NB VA Schools and New Trusts** will need to be considered by the School Organisation Working Group (SOWG). The dates of theses meetings are published in the Academies Toolkit. |  | SOWG |  |  |
| 6 |  | **Land/Local Trustees Conditional Consent is minuted** (if applicable)  The Governing Body should make contact with the Land Trustees to seek their formal written approval of the proposed move to academy status. Head/CofG should speak to the incumbent and church wardens about the continuing relationship with the parish. (Please discuss this with the School Organisation Team who can support you with this) | CofG/HT/  Foundation Governors | Land Trustees |  |  |
| 5 |  | **Formally Register interest with the DFE** once the DBE Conditional Consent is received in writing. (This should be in discussion with the proposed MAT). The school will be assigned a Lead Contact person. <https://www.gov.uk/government/collections/convert-to-an-academy-documents-for-schools>. NB Groups of schools who are joining can now submit one application form. | CofG |  |  |  |
| 7 |  | **Informal Pre-Consultation**  Schools should produce information to inform parents and stakeholders about a possible conversion to academy status (The MAT you are joining may have model documents to help.) | GB/  School/MAT |  |  |  |

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| **Applying for an Academy Order** | | | | | | |
|  | **Date/**  **Time Scale** | **Stages to Conversion** | **Action** | **Decision** | **Com-pleted** | **Lead Person** |
| 9 |  | GB completes the **DFE Academy Conversion Form** in liaison with the MAT. The signed DBE Conditional Consent Letter must be attached to this application. Your application can not proceed without this Conditional Consent. A copy of you application form should be send to the DBE Academies Adviser. | GB/BW  DBE/School or MAT | RSC |  |  |
| 10 |  | Following submission the GB and School respond to any questions received from the DfE. All relevant correspondence related to the submission should be copied to the DBE. |  | GB/School |  |  |
| 11 |  | A lead RSC officer will be appointed to the Trust and/or School. They will work with you, the Trust and the Diocese to decide the best date to submit the proposal to the **Headteacher Board.**  The RSC will be undertaking further due diligence on the school and the capacity of the Trust to support you. You may be assigned a **Headteacher Board Advocate** who will work with the Trust.  The Diocese will work with RSC officers on your behalf during this period related to timings etc. | CofG or Working Group Lead |  |  |  |
| 12 |  | Headteacher Board will review the information provided. If they approve the academisation then the RSC will issue an **Academy Order (AO)** – sometimes there are conditions are attached to this e.g. financial.  The Academy Order is received by the school. A copy of the AO is sent to the MAT and the School for information and a copy should be sent to the DBE and, if relevant, to the Local Trustees. Please also inform the LA.  With the order you will receive confirmation of the DfE Project Leads for the conversion and the £25k conversion grant will be allocated. The cost of the grant, in most cases, covers the cost of conversion.  If an Academy Order isn’t granted, feedback will be given to the Trust and/or School explaining the reasons. The Diocese will also liaise with the RSC and support the school with the next steps. | School | RSC  DfE/School |  |  |
| **Post Academy Order to Conversion** | | | | | | |
|  | **Date/**  **Time Scale** | **Stages to Conversion** | **Action** | **Decision** | **Com-pleted** | **Lead Person** |
| 12 |  | **Parent and Community- Formal Consultation**  Arrange for a letter/consultation document to go out inviting comments and questions; allow a six week consultation period during term time, which can begin at any time. Arrange a formal consultation meeting to be held within the consultation period and invite all stakeholders. Ensuring the meeting is minuted. **Please follow guidance from your LA and RSC lead regarding this process.**  **A Written Report of the Consultation Process (Statutory)**  Following the formal consultation the Governing Body should meet to consider responses and to decide whether to ratify the decision to seek academy status. Ensure the decisions are minuted with a copy sent to the MAT and DBE. | CofG/  School | GB |  |  |
| 13 |  | **Legal Work & Transfers by MAT Appointed Solicitors, Diocesan Solicitor, Local Authority and Diocese**  Ensure outstanding statutory land transfers are completed (from LA to trustees) MAT solicitors will draw up:   * Supplemental Funding Agreement * Church (Land) Supplemental Agreement * Lease for playing fields or other land held by the LA * Commercial Transfer Agreement * Bath and Wells MOU   Note: All of these legal documents will need the formal approval of the DBE and/or approval of the DBE’s own solicitor)  **This list is not exhaustive, only indicative, and dependent on each school’s personal circumstances. The LA and Trust Solicitor will be able to guide you through the process for your school.** NB An undertaking should be given to the Diocesan Solicitor for the DBE legal work to take place. | LA  MAT legal Advisers  Diocesan Solicitor  Diocesan School Organisation Team |  |  |  |
| 13a |  | **Local Authority**  Each local authority will have a meetings with schools during the transfer process and additional information is available from them. | School and LA |  |  |  |
| 14 |  | **HR Matters** – Led by the HR Adviser of the Current Employer (and may be supported by the MAT HR Adviser) who will:   * Arrange an informal staff consultation meeting at the school * The existing employer will issue a ‘measure letter’ (which must specify and proposed changes to Terms and Conditions) to all staff, and then hold a meeting with the regional union representatives, to which Head and C of G will be invited. * LA (or Governors if VA) lead a formal staff TUPE meeting with HR officers and Union representatives with MAT representation. | MAT HR Team  LA HR team or GB if VA |  |  |  |
| 15 |  | **Administrative Preparation**  The MAT will have a list of all of the processes that will be undertaken, the following are just a few to be noted:   * Information for the setting up of a new ‘local’ bank account * List all the leases and contracts held by the school for the CTA (Commercial Transfer Agreement) * The MAT will use a different finance system – bursar training will be given * Assessment systems may differ – guidance will be offered from the MAT | MAT/  School Admin |  |  |  |
| 16 |  | **Governance**   * The MAT will issue the new **Scheme of Delegation** for signature by relevant parties, including DBE. (This should be published on the MAT website) * The MAT agrees constitution of the new local governing body including the DBE’s approval for Foundation Representatives. * If a MATs articles change, there may be additional appointments of Foundation Representatives at Director and Member level required. * Ensure the school is issued with a list of MAT policies which apply to all schools within the MAT. | MAT/GB/School/DBE | MAT  BWDBE |  |  |
| **Post Academy Order to Conversion** | | | | | | |
|  | **Date/**  **Time Scale** | **Stages to Conversion** | **Action** | **Decision** | **Com-pleted** | **Lead Person** |
| 17 |  | **Final Signing of all Legal documentation**, agreed and signed off by all parties, signed in multiple (DfE, DBE, LA and MAT Directors and/or Members. Any local Land Trustees signatures will also be required.  **Signed documents are returned to the MAT solicitor to send to the DfE.** | Legal teams/  MAT/DBE/School |  |  |  |
| 18 |  | **DfE formal approval of academy conversion**  DfE notifies the LA of the order to cease to maintain the school. |  | DfE |  |  |
| 19 |  | **Insurance**  Ensure building and third party Indemnity Insurance relating to your school is in place and copies of insurance are kept by the school for reference. This will usually be by joining the RPA (the DfE central insurance scheme) plus extras i.e. motor insurance, foreign travel etc. | MAT/  School |  |  |  |
| 20 |  | **Contracts**  The school ensures that all existing contracts are either transferred or are terminated and replaced (as captured in the CTA) | School Personnel/MAT/  Solicitors |  |  |  |
| 21 |  | **School Converts to Academy Status**  DfE issues School with the new URN; if sponsored.  DfE issues letter.  EFA agreement in place | DfE |  |  |  |
| **School becomes an Academy within a Multi Academy Trust** | | | | | | |
|  | **Date/**  **Time Scale** | **Post Conversion Information linked to the Diocese** | **Action** | **Decision** | **Com-pleted** | **Lead Person** |
| **22** |  | **Governance**   * Liaise with the diocese regarding appointments of new Foundation Representative LGB members . Also update if any changes made to the Chair of Governors and the Clerk. * Inform the LA of the new members of the LGB. * Foundation Members/Directors/Governors must be appointed and should attend Christian Distinctiveness Training provided by the DBE | **Head/Chair/Clerk/MAT** | **MAT** |  |  |
| **23** |  | **Annual Meeting**  Every MAT, which has a church School in, will undertake an Annual Review which focuses on the MOU signed by the Trust and links closely to the new SIAMS framework. | **CEO/DBE** |  |  |  |
| **24** |  | **Ongoing CPD**  The DBE continues to offer all its Church Schools and Church School Academies a continuing offer of CPD, this currently includes:   * Headteacher and Chair Termly Updates * A SIAMS Health Check * Approval of Foundation Representatives at all governance levels * Training for Foundation Members, Directors and Governors * Headteacher retreat * A wealth of other training and CPD opportunities outlined on the [website](http://www.bathandwells.org.uk/supporting-children/school-effectiveness/training-opps/) | **Head/CEO** |  |  |  |