

# The Academy Conversion Journey

## 1 Pre Application Stage

- Register interest with DfE
- Choose single or MAT structure
- Consent from Governing Body, Foundation / Diocese (where relevant)
- Get familiar with how academy governance works
- Draw up a project plan
- Seek legal advice
- Begin consultation with stakeholders, staff, parents & pupils
- Understand potential pensions liabilities
- Assemble information about land ownership & site issues
- Assemble information about contracts & assets



Start statutory consultation with all affected stakeholders, parents, staff, LA, other schools (~6 weeks)

## 2 Begin Application

- Governing Body resolves to proceed
- Complete DfE Application
- Notify your Local Authority and begin discussions about land and asset transfers
- Draw up stakeholder communications plan



DfE considers application (2-6 weeks)

## 3 Set up Academy Trust

- Academy order is made by Sec of State
- £25k support grant paid
- Funding allocation letter issued
- Draft constitution & incorporate the academy trust company
- Compile statutory registers
- Open bank account
- Adviser drafts Funding Agreement
- Adviser completes & sends Land Questionnaire to DfE



TUPE Consultation with staff – LA leads this (~4 weeks)



## 6 Open as an Academy

- Receive first payment from DfE
- Submit Support Grant certificate
- Publish mandatory info on website
- Complete land and buildings valuation with EFA
- Develop and publish Standing Orders, Board Code of Conduct, Scheme of Delegation, Register of Business Interests, Conflicts of Interest Policy, Risk Register, Business Continuity Plan



(2-4 weeks)

## 5 Prepare for Opening

- Appoint 'Accounting Officer & 'Chief Finance Officer'
- Set up accounting systems
- Last GB meeting & first meeting of Academy Trust board
- Appoint external auditor
- Apply for VAT registration
- Put in place insurances
- Complete DBS checks
- Register with ICO
- Complete all mandatory policies
- Notify exam boards & EduBase



Settle & sign agreements & conclude consultations (~6-8 weeks)

## 4 Transfer Responsibilities

- Adviser drafts and negotiates Lease / Land Transfer arrangements
- Adviser drafts and negotiates Commercial Transfer Agreement
- Apply for pensions registration with TPS & LGPS
- Transfer permits and licences (eg copyright agency, CCTV, music)
- Overseas teachers' registration
- Governing Body meeting approves final documents