## **Transform Trust – Summary Conversion Process Map**

Initial Stage

- An approach is made by a school to join our Trust (or vice versa); or via the RSC (particularly for a school in difficulty).
- A desktop review conducted (Stage 1 DD): website, Ofsted, published performance data.
- A presentation is made to the Governing Body and/or Staff.
- The Governing Body agree to go to consultation and notify LA of intention to consult, OR apply for Academy Order first.
- If the school has a PFI contract, they must alert the DfE prior to applying to become an Academy.

Consultation

- The Governing Body undertakes statutory consultation to seek the views of ALL stakeholders.
- Following the end of the consultation, Governors review and make a resolution to become an Academy and join the Trust (minuted).
- Trustees informed of new enquiries and kept up-to-date on progress.

Consent/ Due Diligence

- The School applies to the RSC to become an Academy.
- The Trust Exec Team conducts its due diligence (Stage 2) and submits to Trustees with recommendation Trustees approve.
- The DfE/RSC give approval and an Academy Order is issued with a conversion date agreed.
- Where any new school is a faith school the Diocese is notified.

<u>Aca</u>demisation

- Academy Order issued.
- Legal teams advised, searches commenced and formal process for usafe of school land and buildings and transfer of contracts begins.
- The Trust applies for an actuarial assessment for pension liability for statutory accounts purpose.
- The site is also valued for statutory accounts purpose.
- Formal TUPE consultation is held owned by the current employer unions invited to attend with all staff.
- Any peculiarities 'ironed out' (eg. solar panels, easements, temporary arrangements).

Final stage

- School registered with RPA.
- Legal documentation is completed and signed: Lease of land and buildings; Supplemental Funding Agreement (SFA) (or Church SFA for Diocesan Schools) and Common Transfer Agreement (CTA).
- Trust Scheme of Delegation issued.
- School becomes an official member of the Trust.
- Welcome to the Trust letter issued to the staff and Trust Induction organised.

Engagement with the Trust



- The Schools joins the TSA (if not already a member)
- Headteacher attends the CEO Headteacher meetings
- The School team begins to access and engage with the range of school improvement support and networks that the Trust has to offer
- Financial, Estates and IT support is provided where appropriate
- HR support is provided where appropriate
- Governors access to the Trust Governor Services

## **Due Diligence Flowcart - Trustee Approval Process**

