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 Regional Director (particularly for a school in difficulty).
- A desktop review conducted (Stage 1 DD): website, Ofsted, published performance data (Exec Team).
- A presentation is made to the Governing Body and/or Staff (Exec Team).
- •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.
- •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).

Consultation

•Trustees informed of new enquiries and kept up-to-date on progress (RM/JW).

Consent/
Due Diligence

- •The School applies to the Regional Director to become an Academy.
- •The Trust Exec Team conducts its due diligence (Stage 2) and submits to Trustees with recommendation Trustees approve. (JW)
- •The DfE/Regional Director 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 (SC).

Academisation

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

Final stage

- School registered with RPA (SC).
- •Legal documentation is completed and signed: Lease of land and buildings; Supplemental Funding Agreement (SFA). A Church Supplemental Agreement (CFA) for Diocesan Schools is in place of a Lease; and Commercial Transfer Agreement (CTA) (Browne Jacobson).
- Trust Scheme of Delegation issued (SC).
- •School becomes an official member of the Trust.
- Welcome to the Trust letter issued to the staff and Trust Induction organised (RH/SH). `

Engagement with the Trust



- The Schools joins our networks
- Headteacher attends the Headteachers Business and Strategic meetings
- Headteacher receives copies of HeadsUp
- The School team begins to access and engage with the range of school improvement support and networks that the Trust has to offer through our TransformApplied
- 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

