CONVERSION TO ACADEMY FOR THE [ ] CATHOLIC SCHOOLS CLUSTER
TIMELINE AND KEY MILESTONES

Dec/Jan

- Initial consultation & due diligence, assessment of governance solution/ model (submission of Expression of Interest to DfE)
- WS appointed
- GB resolution to convert
- Diocesan consent obtained (following application if appropriate)

Feb/March

- Application form submitted to DfE
- Further advisors appointed (if not already appointed)

March/April

- Formal consultation commences: local community (parents, local schools) and staff
- Title investigations to land commence

March/April

- "Academy Order" issued in principle by SoS
- Grant paid on issue of order
- Staff (TUPE) requirements "Measures" Letter sent
- LA notified of intention to convert

May

- Academy trust company (MAT) established
- Negotiations commence with LA:
  - Lease (if necessary)
  - Commercial Transfer Agreement
- Bank accounts opened
- Land issues addressed

June

- Funding Agreements sent to DfE for approval
- Land Questionnaire sent to DfE
- Funding letters received from EFA
- TUPE consultation concludes

July

- Signed Funding Agreements (and Church Supplemental Agreements) sent to DfE
- Insurance/ RPA put in place
- Any Transfer/ Lease signed
- Commercial Transfer Agreement signed

September +

- Conversion Date
- LA notified of removal of duty to maintain
- Funding Agreements completed by SoS
- TUPE transfer takes place, staff notified
- Transfer/ Lease and Commercial Transfer Agreement completed

Winckworth Sherwood

If you would like to discuss this structure, please contact Andrea Squires on: 0207 593 5039/ asquires@wslaw.co.uk