Department for Education

Key dates for schools converting to academy status on 1 July 2015

If these deadlines are not met, whilst we will try our best we cannot guarantee your school will be able to convert on 1 July 2015

Schools open as an academy on the first day of the month. In order to open on the chosen month, all the necessary paperwork associated with the conversion must be completed in the previous month.

In order to achieve this, the table below sets out the key dates for schools planning to convert on 1 July 2015. The table indicates the final dates for documents and other information to be sent to your Department for Education project lead and the Education Funding Agency (EFA) in order to ensure your opening on 1 July 2015. If these deadlines are not met whilst we will always do our best, we cannot guarantee your school will be able to convert on 1 July 2015.

Please note that the model documents have been developed with advice from the Department's legal advisers and the Charities Commission. They have also been adapted over time based on our experience of helping schools become academies. They should be suitable for all schools converting to academy status. We do not expect changes to these documents and any changes do risk delaying your conversion.

Actions for schools to complete

There are a range of actions that schools must complete prior to conversion. You will have already started many of these earlier in the process. They are:

- TUPE

- Consultation

- Any shared use agreements must be approved by the DfE and set up with the academy trust

- Any loans must be approved by the DfE and transferred to the academy trust

- Land arrangements must be agreed by the DfE. Land issues can often be tricky, time consuming to resolve and cause delays to conversion so we suggest that you prioritise these for early work.

In some conversions, even where the deadlines have been met, complex issues (particularly for schools which have PFI contracts) can arise which need to be resolved prior to conversion date. If you have any questions about what action you should be taking, by when, please see the guidance on the http://www.gov.uk/dfe website or speak to your project lead.

The key dates are shown below:

Date	Event

Friday 29 May	Final <u>fully completed</u> versions of the following documents to be sent to your DfE Project Lead
	
	  - A fully completed land questionnaire, including site plan for the academy.
	
	  Partially completed land questionnaires will be returned to solicitors and the deadline not met unless re-submitted by this date.
	
	  - Draft memorandum and articles of association.
	
	  - Draft funding agreement(s) and annexes.
	
	  Please note: no changes should be made to the text of documents once they are cleared by the Department.
	
	In addition, and where applicable
	
	  - Final draft of any leases/sub-leases which the academy trust plans to issue. This is where post–conversion an academy trust holding a freehold or leasehold interest in land intends to issue a lease or sublease to a third party tenant. This is not the 125 year lease from the LA to the academy trust.

Monday 1 June	Written confirmation (via email) to your DfE project lead that: - The Commercial Transfer Agreement (CTA) has been agreed. - The main terms of any leases have been agreed (125 year lease from LA to academy trust), including any sub-leases that the academy trust intends to issue.
Monday 8 June	Submit to your DfE project lead: - 2 paper copies of DfE approved and signed but not dated funding agreements, memorandum and articles of association, any supplemental agreements or supplemental funding agreements. **Please note no changes should be made to the DfE approved text.** - Confirmation that leases and sub-leases have been signed by all parties. Confirmation that the CTA has been signed by all parties.
Wednesday 10 June	Send the academy's bank details to EFA using the form provided and copied to your DfE project lead. This is essential so that the EFA can set up the mechanism to fund the academy once it has converted.