



GUIDANCE TIMELINE TO JOIN THE POTTERIES EDUCATIONAL TRUST

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 April 2021. The table indicates the final dates for documents and other information to be sent to your Department for Education project lead and the Education and Skills Funding Agency (ESFA) in order to ensure your opening/joining on 1 April 2021.

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.

Action	Deadline	Person responsible	Complete (✓)
1. School to seek a resolution to convert to an academy and join a MAT from their governing body and record their resolution in minutes	June 2020		
2. Complete the relevant DfE application form to apply to convert Trust then receives £25k start up grant to support	June 2020		
3. School to notify Local Authority of its intention to convert to Academy status.	June 2020		
4. School to consult with staff	June 2020		
5. School to consult with parents/carers and feeder schools	June 2020		
6. School Board take decision to join MAT.	July 2020		
7. MAT Board notified of School's decision to start process to join the MAT and obtain their agreement.	July 2020		
8. Inform School staff of decision to join the MAT.	July 2020		
9. Inform School parents/carers of decision to join the MAT.	July 2020		
10. Application to join the MAT submitted online to DfE by the Potteries Educational Trust.	September 2020		
11. Timeline for conversion finalised and circulated.	September 2020		

12. Engage solicitors to undertake legal process.	September 2020		
13. Meet with Professional Associations to share proposals.	October 2020		
14. Information event for staff and parents/carers.	October 2020		
15. Begin formal due diligence process	October 2020		
16. Regional Schools' Commissioner and Headteacher Board consider proposal.	November 2020		
17. Meet with Staff and Professional Associations to explain TUPE and launch consultation .	December 2020		
18. Meet to review progress on timeline for April start.	December 2020		
19. Financial Due Diligence completed and considered by MAT board Finance Committee.	January 2021		
20. Academic and Legal Due Diligence completed.	January 2021		
21. All Boards agree and finalise proposals.	February 2021		
22. Letter to LA for transfer, charges, novation and carry forward balances	February 2021		
23. A fully completed land questionnaire including site plan submitted to DfE	February 2021		
24. Draft memorandum and articles of association sent to DfE project lead.	March 2021		
25. Draft funding agreement(s) and annexes sent to DfE project lead.	March 2021		
26. Final draft of any leases/sub-leases which the academy trust plans to issue sent to DfE project lead.	March 2021		
27. MAT board ratifies proposal for School to join the MAT.	March 2021		
28. Submit written confirmation that The Commercial Transfer Agreement has been agreed to DfE project lead.	March 2021		
29. Submit written confirmation that the main terms of any leases have been agreed including any sub-leases that the MAT intends to issue to DfE project lead.	March 2021		
30. Submit approved and signed Funding Agreement (CTA), Memorandum and Articles of Association and any supplemental agreements to DfE project lead.	March 2021		