



Department
for Education

Academy Conversion information

North West Regions Group

Process overview

Stage 1 and 2
consent given by the
Diocese of Salford

Complete DfE
application form
through 'Apply to
Become Service on
gov.uk

A Delivery Officer in
North West Regions
Group will be
allocated to you and
will contact the CoG
and Headteacher
within 5 days of
receiving the
application

The Delivery Officer
prepares papers of
the proposal to
present to the
Regional Director for
approval at Advisory
Board (AB)

Once approved, the
project moves into
the 'delivery' phase
and a Delivery
Officer* supports the
school through to
conversion

*May not be the same Delivery Officer that
presented to AB

Application to conversion – an average timeline

10-12 weeks from application to approval

16 – 20 weeks from approval to
conversion

Before you apply

Gov.uk has guidance documents to support through conversion from the application stage, this includes model land questionnaires, information regarding leases and commercial agreements. All this information can be found at: [Convert to an academy: documents for schools - GOV.UK \(www.gov.uk\)](https://www.gov.uk/guidance/convert-to-an-academy:documents-for-schools)

Where and how to apply

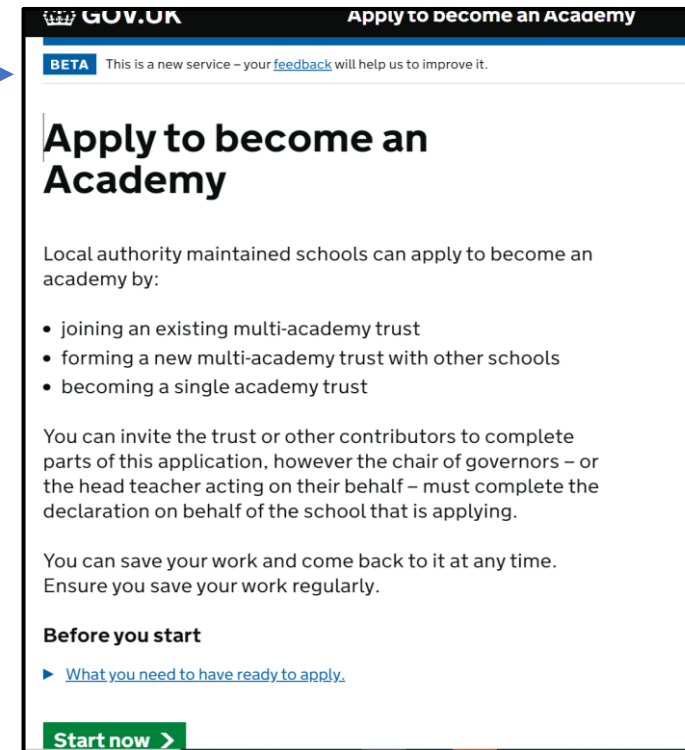
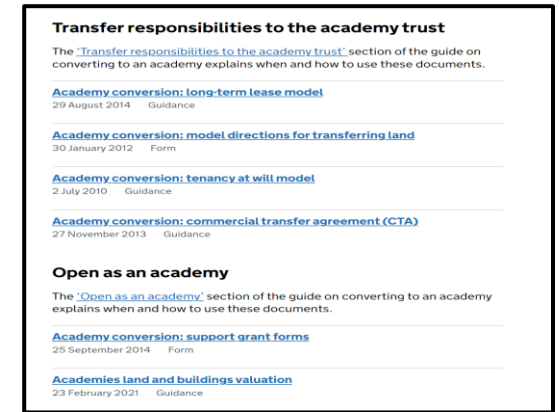
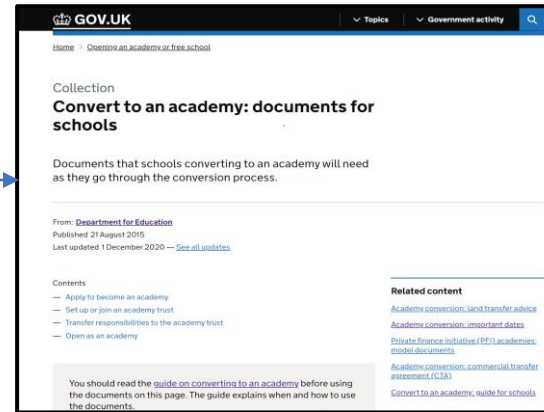
All applications are completed online at:
[A2C - GOV.UK \(apply-convert-academy.service.gov.uk\)](https://apply-convert-academy.service.gov.uk)

To apply you will need:

- School finance information including capital and revenue balances for last year and this year
- Details of any loans and leases
- Pupil numbers on roll for the next 3 years

Important points:

- The CoG must submit the application, if this is not possible it can be submitted by a SBM or Headteacher but the CoG must confirm they approve of the application through an email to Debbie Dempsey
- Minutes from GB meeting or a resolution letter must be sent to Debbie that confirms necessary action has been taken to vote on academisation



Important!

Be clear on why you want to become an academy now, what can the school offer to the trust and what will the school gain by joining the trust.

Who is the Regional Director

Vicky Beer is the Regional Director for the North West, Vicky has been in post since 2015 (prior to September 2022 this role was the Regional Schools Commissioner for Lancashire and West Yorkshire).

What is the Advisory Board and what is its function?

Advisory boards are responsible for advising and challenging regional directors on academy related decisions, this includes decisions on LAM schools to convert to academy status, free schools, trust growth etc.

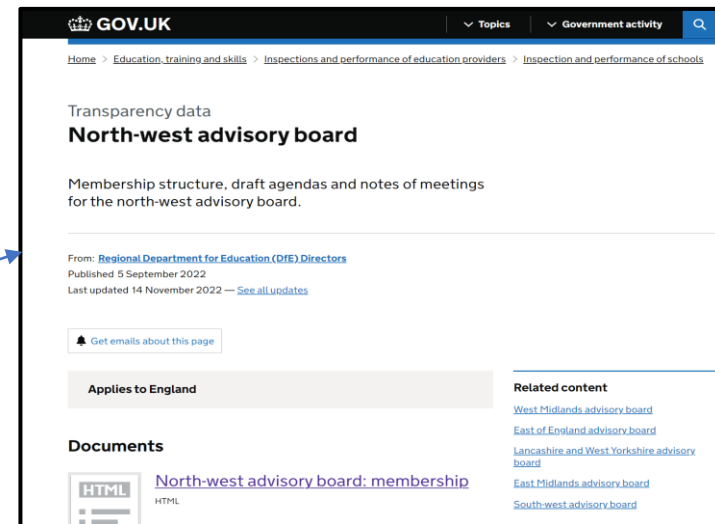
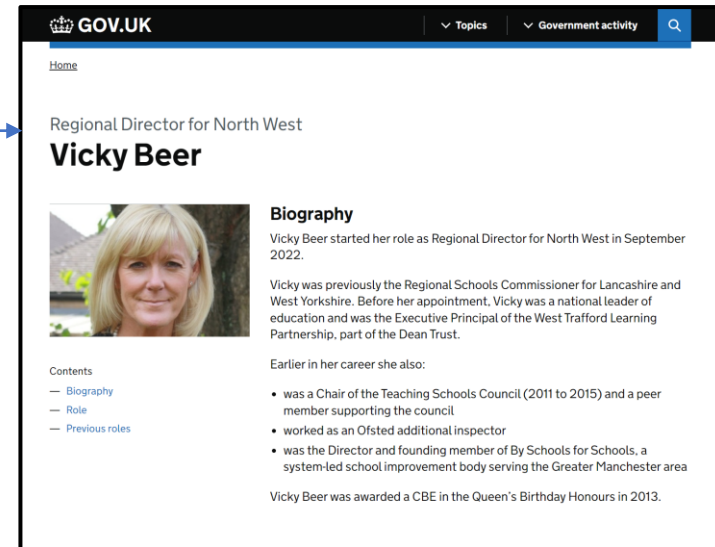
During AB meetings the Board will listen to proposals and when advising the Regional Director will consider:

- Capacity of the trust
- Strengths of the school
- Trust growth strategy
- Local context

Details on who the members of AB are can be found online [North-west advisory board: membership - GOV.UK \(www.gov.uk\)](https://www.gov.uk/north-west-advisory-board/membership)

There are 10 AB meetings per year, there is no meeting in January or August.

Meeting agendas are published online 3 weeks before the meeting and can be found here [North-west advisory board - GOV.UK \(www.gov.uk\)](https://www.gov.uk/north-west-advisory-board) outcomes are also published online after the meeting.



Preparing for Advisory Board

Things that the Delivery Officer will want to discuss to prepare AB papers and presentation

What is the rationale for the school applying to join the trust now

What are the school's strengths and capacity that will be brought into the trust

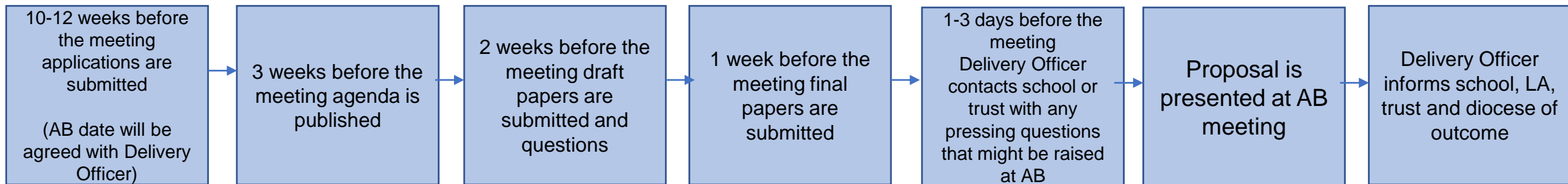
What will the trust gain from joining the trust

Is the school working with local clusters and partnerships on school improvement or sharing best practice/QA? If so, which ones

Has the LA been informed of the application

Information about school leadership

Preparing for AB – an average timeline



Delivery Officer drafts AB papers and seeks further information from the school and trust throughout



When will I be informed of AB outcome and what happens next?


The Delivery Officer will contact the school, trust, diocese and LA to inform of the AB outcome within 2 working days of the AB meeting and the Academy Order will also be sent out.

The Delivery Officer will arrange a project planning meeting and will invite the school and their legal team, trust, diocese and LA. An agenda and a readiness opening checklist will be shared ahead of this meeting, one of the first items at this meeting will be **to agree a conversion date (this will depend on the capacity of the LA, DfE and school)**.

Delivery Officer will work with the school, trust and LA throughout the conversion to ensure actions and deadlines are met. A link to the published deadlines is here: [Academy conversion: important dates - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/publications/academy-conversion-important-dates)

Appointed legal team will advise the school throughout conversion.

ACADEMY READINESS FOR OPENING CHECKLIST			
In advance of the [ENTER CONVERSION DATE] conversion of [ENTER SCHOOL NAME], I would be grateful if you could confirm that the following actions have been completed.			
Schools open as an academy on the first day of the month. In order to open on the chosen month, all necessary paperwork associated with the conversion must be completed in the previous month.			
<i>If these deadlines are not met, whilst we will try our best we cannot guarantee your school will be able to convert on the agreed date. If the school does not convert on the chosen month, the opening will be moved to a date both the Department and the Local Authority can accommodate.</i>			
Action	Responsibility for confirming	Target date for completion	Comments (where actions have not been completed please provide comments on progress and expected completion date)
1. Consultation a. Has TUPE consultation completed? Or, as a foundation school or VA school, has the governing body confirmed that a TUPE consultation has completed?	Academy Trust/School	[insert deadline date you have agreed] All deadlines are either 4 or 8 weeks before the agreed conversion date.	
2. Duty to Inform Parents [for dAOs only] The Education & Adoption Act 2016 places a duty on sponsors to communicate to parents their plans to improve the school, before the school is converted into a sponsored academy. Note that this is to communicate, not consult parents. How does the Trust intend to communicate to parents their plans to improve the school?	Academy Trust		
3. Legal Documents. Please confirm that the following has been completed: Articles – have been agreed with the DfE and incorporated at Companies House.	Solicitors		



Department for Education

Key dates for schools converting to academy status on 1 March 2023

If these deadlines are not met, whilst we will try our best we cannot guarantee your school will be able to convert on 1 March 2023.

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 March 2023. 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 on 1 March 2023. 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 March 2023.

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.



If you have any questions please contact:

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