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| Academy Conversion Questionnaire |
| Joining a Multi-Academy Trust  Information Request |



Proposed Conversion

Information

This questionnaire has been prepared to assist us in efficiently gathering the information that we require in order to carry out the legal work in connection with the conversion of the school.

| **Question No.** | **Enquiry** | **Response** |
| --- | --- | --- |
|  | **The school** | |
|  | Name of school (please also confirm the name of the academy on conversion if it will be different). |  |
|  | Type of school (e.g. special, community, foundation, VA, VC, etc). |  |
|  | Age range (please explain if different from GIAS). |  |
|  | Capacity (please explain if different from GIAS).  (note that this needs to be the net capacity figure that has been agreed with the Local Authority). |  |
|  | Full time nursery numbers (if applicable).  (please provide separate figures for compulsory school places and full-time nursery places). |  |
|  | 6th form numbers (if applicable). |  |
|  | SEN Unit or resource provision (if applicable).  (please confirm number of planned places, the age range and SEN categories). |  |
|  | Preferred conversion date. |  |
|  | Do you have a copy of your DfE letter of conditional consent/Academy Order? If so, please attach.  Please confirm if this is a Directive Academy Order. |  |
|  | **The Multi Academy Trust (MAT)** | |
|  | Name of the MAT the school is joining. |  |
|  | Do you have a signed and sealed copy of the MAT Master Funding Agreement? If so, please attach. |  |
|  | **Contact Details** | |
|  | Main school contact(s):  Telephone no:  Mobile No:  Email address: |  |
|  | Main MAT contact(s):  Telephone no:  Mobile No:  Email address: |  |
|  | Local Authority (LA) contact:  Telephone no:  Mobile No:  Email address: |  |
|  | DfE project lead:  Telephone no:  Mobile No:  Email address: |  |
|  | (For church schools/schools with religious ethos only)  Diocese lead:  Telephone no:  Mobile No:  Email address: |  |
|  | **Employees and TUPE**  *Where you respond ‘yes’ to a question in this section then please provide brief details* | |
|  | Is the Local Authority (LA) currently working with you in respect of the TUPE process? |  |
|  | Please let us know if you need any support with respect to TUPE from our specialist education employment lawyers/HR team. |  |
|  | **Assets and liabilities** | |
|  | Please provide a list of all contracts/ licences and arrangements relating to the school which are to transfer to the MAT using the attached Annex to provide this information. |  |
|  | Are there any contracts/licences or arrangements which should not transfer to the MAT?  If yes, then please provide details |  |
|  | Please confirm if there any contracts or arrangements in your attached list of contracts which would require the consent of the supplier or any other party in order to transfer the benefit across to the MAT. |  |
|  | Are there any assets at the school which will **not** transfer across?  If yes, then please provide details. |  |
|  | Is the school budget in surplus or does the school have a deficit ?  If the school has a deficit, please provide brief details including details of any arrangements agreed with the DfE/LA to contribute towards repaying/writing off this deficit. |  |
|  | Does the school have a private fund account? (e.g. for funds for school trips) that should transfer to the MAT on the conversion date?  If so, please provide the following details:  Bank name:  Account name:  Account number:  Sort code: |  |
|  | Does the school have any collaboration companies, trading companies or separate charitable trusts? |  |
|  | **Real Estate**  *Where you respond ‘yes’ to a question in this section then please provide brief details* | |
|  | Please provide full address(es) of school site. |  |
|  | Who currently owns the school’s land?  If it is owned by a foundation/trust, do they agree in principle to the school’s conversion? |  |
|  | Does the school have the use of any other property which does not form part of the main school site? |  |
|  | Does any other third party use the school site or share use of any part of the school premises? This includes access to utilities.  If yes, please give details. |  |
|  | Have there been any issues arising in relation to the school gaining access to the property or the maintenance of the access roads? |  |
|  | Who is currently responsible for paying to maintain the access road and what is the proposal once the school becomes an academy? |  |
|  | Are there any communication masts on the site? |  |
|  | Are there any temporary buildings on the site, e.g. modular buildings or portacabins? |  |
|  | Is there a caretaker’s house on the school site? Please provide the address details. |  |
|  | Is the house occupied by a resident caretaker. If yes, please provide a copy of their service occupancy agreement. If no, what is the caretaker’s house used for and what will it be used for after conversion? |  |
|  | Can you provide a plan of the school site, showing edged red, all the land used and occupied by the school. Please also annotate the plan to show all vehicle and pedestrian entrance/exit points and if applicable, the location of the caretaker’s property (if applicable). |  |
|  | **Disputes and insurance** | |
|  | Please provide details of any ongoing or potential disputes involving the school (e.g. slip and trip claims, disputes with suppliers, etc) |  |
|  | Please provide details of any claims in the last three years under any insurance policy. |  |
|  | **Shared Use** | |
|  | Other than those already outlined in the ‘Property’ section, does the school have any other shared use arrangements in relation to land or premises?  If yes, please summarise these and explain whether and how the current shared use arrangements will continue after conversion. |  |
|  | **Leisure/Sports Facilities** | |
|  | Does the school premises have a leisure centre/sports hall/swimming pool/sports pitch/MUGA or any similar facilities which are used by the wider community as well as by the school itself?  If no, go to next question. |  |
|  | If yes: | |
|  | Who uses these facilities and what is the pattern of use specifically is the school the majority user? |  |
|  | Does the school or some other body manage this wider community use of the facilities? |  |
|  | What are the staffing arrangements in relation to the facilities? Are staff working in the facilities employed by the school or by some other body? |  |
|  | Are charges levied for the use of the facilities?  If yes, who sets the level of fees charged? |  |
|  | What is the total annual income received? |  |
|  | What are the costs of running the facility? |  |
|  | How are the finances monitored? |  |
|  | What is the level of any profit generated, and what is it used for? |  |
|  | Has any external body contributed to the costs of the facility?  If yes, are there any conditions attached to their contributions? |  |
|  | What arrangements for the management and running of the facilities are proposed post conversion? If this facility is owned by the local authority rather than a school facility will it be carved out of any lease to the Academy Trust or will it be leased back to the local authority (or a third party)? |  |
|  | **Children’s Centres** |  |
|  | Is there a Surestart/Children’s Centre on the school premises or operated/run by the school?  If no, go to next question. |  |
|  | If yes: | |
|  | Please confirm who runs the centre and the management arrangements. |  |
|  | What arrangements/agreements exist in relation to the centre/centres? |  |
|  | Who will operate the centre and what arrangements/agreements are proposed post conversion? |  |
|  | **Nursery** |  |
|  | Is there a nursery on the school premises or operated/run by the school?  If no, go to next question. |  |
|  | If yes: | |
|  | Please confirm who runs the nursery i.e. the Governors using their community powers (s.27 Education Act 2002). |  |
|  | What arrangements/agreements exist in relation to the nursery? e.g. about the use of space, access, or operation out of term time/school hours? |  |
|  | What is the age range of the children attending the nursery? |  |
|  | **Grant funding** | |
|  | Has the school received any grants?  *Sport England grants, National Lottery grants, Energy Local grants, Football Foundation grants* |  |
|  | Please provide brief details of each grant received and indicate for each one whether it has been spent.  Please also provide a copy of any novation agreements in respect of such grants. |  |
|  | Is the school in the process of applying for any grant funding/any further grant funding?  If so, please provide details. |  |
|  | **Capital funding and building works** | |
|  | Is the school being allocated capital funding (SCA or CIF funding, Targeted Basic Need, School Rebuilding Programmes) or is it part of a local authority Basic Need expansion or any local authority funded maintenance or building works?  In 10.2 below please confirm either ‘Yes’, ‘No’ or ‘Does not apply’ and provide the required details where necessary: |  |
|  | If yes, please provide full details, including:  a) What works are planned and when?  b) What is the total level of funding?  c) Who is paying for the building works?  d) Will the funder continue to fund the works if the school converts?  e) What is the scheduled completion date for the works?  f) Whether any contracts relating to the building works (or its project management) need to be novated to the academy trust  g) Please confirm that the benefit of any warranties or guarantees will pass to the academy trust. |  |
|  | Please can you confirm if are there any other current or planned building works?  In 10.4 below, please confirm either ‘Yes’, ‘No’ or ‘Does not apply’ and provide the required details where necessary: |  |
|  | If yes, please confirm:  a) Arrangements for the funding and how, if at all, these will be affected by the conversion;  b) That the benefit of any warranties or guarantees will pass to the Academy Trust. |  |
|  | **General** | |
|  | Is there anything else that you think we should know in respect of this project?  If yes, please provide details |  |
|  | Is there any aspect of the project that you are particularly concerned about?  If yes, please provide details |  |

Annex: School Contracts & Licences

Contracts to be **transferred** to the MAT

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| --- | --- | --- | --- |
| Name of contractor/supplier | Goods/services provided under contract | Contract start date | Contract end date |
| *e.g. Konica* | *e.g. Photocopiers* | *e.g. 1 April 2016* | *e.g. 31 March 2023* |
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Contracts to be **excluded** from the conversion (will not transfer to the MAT)

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| --- | --- | --- | --- |
| Name of contractor/supplier | Goods/services provided under contract | Contract start date | Contract end date |
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