

MAST Academy Handbook

September 2022
Version 3

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This Academy Toolkit has been prepared by the MAST Executive Team as a guide to assist governors as they consider the process of academisation.

Please read this document alongside 'MAST Policy for Academisation' (Annex 1)

Government guidance can be found at

<https://www.gov.uk/guidance/convert-to-an-academy-information-for-schools>

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/987336/Building_strong_academy_trusts_guidance.pdf

In the context of this document, the term 'Methodist school' refers to any school for which the Methodist Council is the Religious Authority, or shares authority with another denomination. This includes solely Methodist, Joint and Ecumenical schools. TMCP refers to Trustees for Methodist Church Purposes who secure the trust deeds of the schools.

Further information for Methodist schools is available from the MAST Executive Team or by contacting oolayinka@methodistschools.org.uk

THE CURRENT CONTEXT

In March 2022, the White Paper, 'Opportunity for all: strong schools with great teachers for your child' shared a vision for a fully trust led system with a single regulatory approach.

The Government's ambition is for this to be realised by 2030 and the Department for Education has begun to put in to place the legislation to make this vision a reality.

MAST has until recently maintained a neutral stance towards academisation, while working to support the transition of any schools seeking to convert. The drive to a fully trust led system has placed a different expectation upon MAST; MAST is now required to have a long term strategy for Methodist Schools and to work closely with the Government to realise this.

As the Religious Authority, MAST plays a key role in the academy conversion of Methodist Schools, ensuring that they belong to an Academy Trust that will support the flourishing of their Methodist ethos and trust deed with the legal documents to secure this for the long term. It also has a duty to ensure the Executive Team, Trustees for Methodist Church Purposes (TMCP) and other Church partners have the right capacity in place to manage, and phase, the work that will arise. MAST will continue to work closely with the DfE, Local Authority and Diocesan partners during this period.

This work forms part of a bigger picture nationally - the Government and Local Authorities are undertaking similar audits and establishing their long term strategy to ensure that they have strong trusts in all areas. At all levels, this means moving from an incremental to a strategic approach to academisation.

This seismic shift in education policy and organisation appears to be as significant as that which emerged following the 1944 Education Act. At that time, the Methodist Church made a long-term commitment to Methodist education, which has been lived out since in the Voluntary Aided and Voluntary Controlled systems that have brought us to this point. In 2021 the Methodist Conference adopted *Transforming Lives*, the church's education strategy for the next 10 years. This again confirmed its long term commitment to sustaining and growing Methodist education. The MAST policy on academisation and this handbook are established within the ethos of this work.

INDIVIDUAL SCHOOLS CONVERTING TO ACADEMY STATUS

INITIAL STEPS

- Governors must consider the document 'MAST Policy for Academisation' before proceeding further.
- The Chair of Governors and Headteacher should engage in an initial discussion with either the MAST Head of Service or a member of the Executive Team at the earliest opportunity regarding the exploration of academisation.
- Governors must convene a full, quorate meeting of the governing body to discuss the academy agenda. If at the meeting governors resolve not to pursue academy conversion further at this stage, they should ensure that the subject is placed as an agenda item on a full governing body meeting at least once in every academic year.
- If the full governing body resolves to explore academy conversion further, they should agree the constitution of and then establish an Academy Working Group.

RESEARCH AND NEXT STEPS

School leaders should begin to research:

- Which schools (church and community) in the area are considering conversion to academy status – hold conversations with any interested schools to see if there is interest in establishing a HUB for the Methodist trust in the area.
- The MAT provision in the area that would provide a potential home for you / your group of schools (for Methodist schools this will be the Methodist led trust in that area and joint schools to be either in the Methodist led trust or a Diocesan trust). This will include discussions with trust leaders.
- The Chair of the Governing body should complete the form 'Register Interest in Academy status' (Appendix 2) and send it electronically to the MAST via oolayinka@methodistschools.org.uk marking the covering email 'Register Interest in Academy Status Form – name of school'

CONVERT TO ACADEMY STATUS WITHIN AN EXISTING MAT – APPLICATION FOR MAST CONSENT

- Following the meeting with MAST and completion of action points raised, the Chair of Governors should convene a meeting of the full governing body to consider all information collated to date. Governors must resolve either to progress to academy conversion, or not at this stage.
- If governors resolve to progress to conversion, the Chair of Governors should complete the form 'Application for MAST approval to proceed to conversion' (Appendix 3). This should be sent electronically, along with a copy of the governors' resolution and a copy of the resolution of the potential receiving MAT, to MAST via oolayinka@methodistschools.org.uk marking the covering email 'Application for MAST approval to proceed to conversion – name of school'.

- On receipt of the application by MAST, an electronic acknowledgement will be dispatched within 12 working days containing details of the allocated date/time for MAST to consider the application. Governors may be called to present their case to the relevant sub-committee of MAST responsible for academisation.
- MAST will send a written response to the Chair of Governors within 12 working days of MAST's consideration of the application. This response will reflect the specific context of the school applying and will name the Multi Academy Trust (MAT) into which the school will convert. It will also include undertakings that governors must give to MAST that certain conditions will be met before conversion can take place.
- Note: Any application by a Methodist school to the DfE for an academy order requires written MAST consent. This consent will be conditional until all conditions required for conversion have been met.

Governors must not register their interest online with the DfE until agreement is reached with MAST on the timing of registration.

PROGRESS TOWARDS CONVERSION

Following receipt of a MAST conditional consent letter, the Chair of Governors will:

Action (some can be simultaneous)	By Whom	Comments
Register online with the DfE	Chair of Governors	https://apply-convert-academy.service.gov.uk
Apply to the Secretary of State for an Academy Order	Chair of Governors	https://apply-convert-academy.service.gov.uk
DfE Project Lead assigned	Regional Directors office	The RD office will inform you of your project lead
Inform the Local Authority (LA)	Chair of Governors	By email to the Head of School Organisation in the appropriate LA
Academy Order is received	From the DfE to the school/MAT	A copy of this must be sent to MAST via oolayinka@methodistschools.org.uk marking the covering email: [school name] copy of Academy Order
Apply to ESFA for grants	MAT	See DfE website www.gov.uk *a receiving bank account will be required so details can be included in the form. Details should be obtained from the MAT the school will be joining.
Grants received	From ESFA by the MAT	These will be received into the MAT bank account
Instruct Solicitors	MAT	Some MATs engage a Project Manager to alleviate pressure from the Head Teacher and Business Manager. Speak to the MAT to find out more
	MAST (via the Executive Team)	MAST will provide the name of the solicitors they are using and inform TMCP. The MAT/school may wish to consider whether economies of scale can be achieved by instructing the same firm of solicitors as MAST.
Further consultation	MAT	There is no formal process and timescale for consultation, however there is useful guidance at www.gov.uk . Good practice models are also available from other MATs

Action	By Whom	Comments
TUPE process	MAT	Transfer of Undertaking & Protection of Employees rights. This should be carried out by the current employer; however, an existing MAT may provide support or the project manager.
Preparation of legal documents <ul style="list-style-type: none"> • Land questionnaire • Title searches • Supplemental Funding Agreement (SFA) • Church Supplemental Agreement (CSA) • Side letter (if using the DfE Risk Pooling Agreement (RPA) in place of insurance) • 125year lease with LA (playing fields and any other land owned by the LA) • Trust Modification Order (where appropriate) • Commercial Transfer Agreement (see below) • Consent letters from trustees and/or those who appoint foundation governors • Consent from receiving MAT 	MAST and MAT solicitors	All outstanding statutory transfers by the LA to TMCP or site trustees must be completed prior to conversion and all costs pertaining thereto met from the academy conversion grant. *whilst the Executive Team will use their best endeavours to recoup all costs in relation to statutory transfers from the LA, governors will remain responsible for paying these in the event that recoupment is not successful.
Commercial Transfer Agreement	MAT/school solicitors	Transfer all contract and service matters from the LA to the MAT.
Finance	MAT	Receipt from and accounting to the ESFA for funding. Agree closing balance with LA.
Insurance	MAT	The interest of the trustees and MAST should be noted on the policy. Even if using the DfE Risk Pooling Agreement (RPA), care should be taken that all relevant insurances, apart from those covered under the RPA, are put in place. A list of required insurance cover

		can be found on the DfE website www.gov.uk
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Notes:

Land issues – complexities may be uncovered during the conversion process and have the potential to delay the provisional conversion date.

OPEN AS AN ACADEMY

The following will happen (some simultaneously) and will be dealt with by the MAT:

- Welcome letter and information pack received from ESFA
- First payment from ESFA received (by the MAT)
- Publish SFA on academy website (school)
- Complete land/building valuation within 6 weeks (MAT/school)
- Support from ESFA (finance)
- Peer support where appropriate from relevant professional bodies.

CONCLUSION:

The Executive Team is working diligently to ensure there will be a suitable Methodist MAT for all schools as they become academies. With political and social change, it is uncertain what national authorities will be available to support schools and what the demands of those who do might be. The Methodist Church has been responsible for providing educational establishments for just short of 300 years and is still a stable, secure and thriving provider, committed to continuing to do so. The MAST family of schools has a strong community as we watch over one another in love to support the very best outcomes for staff and children alike.

Whilst every care has been taken in the preparation of this document, the process and procedures of the academy programme are subject to change. The document will therefore be reviewed regularly. Check the MAST and Methodist Schools websites regularly for the most recent copy.

APPENDIX 1: MAST POLICY FOR ACADEMISATION

Please download the latest copy from the MAST website.

KEY PRINCIPLES

- Methodist Academies Schools Trust will work proactively with Local Authorities, Regional Directors, our local Methodist, Diocesan and School-led Multi Academy Trusts (MATs), our local schools and the Department for Education (DfE) in strategic planning and determining academy proposals and arrangements.
- In its role as Religious Authority, the Methodist Council has directed that solely Methodist Schools should join a Methodist academies trust. By definition these are our own Methodist led Trusts – Epworth Education Trust (EET) or Inspiring Lives Education Trust (ILET). MAST acts as the delegated body of the Council, liaising with the Connexional officer with responsibility for education and the Chair of the Methodist Schools Committee.
- Acting on behalf of the Religious Authority, MAST expects our joint schools (either Church of England or Ecumenical) to join a MAST-led or Diocesan-led option. By definition these are our Methodist led Trusts – Epworth Education Trust (EET) or Inspiring Lives Education Trust (ILET), or those MATs within a Diocese that are classed as Diocesan MATs.
- MAST requires schools to submit applications for consent to convert in good time for the process for consideration to be carried out. Consent will not be given unless MAST has had the time to give the application due consideration.

THE PROCESS

Conditional Consent from MAST will be required in respect of academy conversions. This will only be granted following a full discussion and is not to be viewed as a formality.

- An initial conversation will need to be held with a member of the MAST Executive Team outlining the school's intentions around academisation and their choices.
- The MAST Executive Team will outline any further discussions that MAST will require before any application is submitted. MAST will not consider giving consent until the appropriate options have been fully explored. For solely Methodist Schools, this will be a Methodist led trust and for joint schools both Methodist led trusts and Diocesan MATs.
- A written application (on the specific form attached) from both the school and the receiving MAT needs to be submitted to MAST so that conditional consent can be considered.
- The MAST board can only grant conditional consent. Schools need to be aware of the timescales this might involve, allowing for the passage through the sub-committees and the full Board that meets once a term only.
- MAST will normally grant provisional and conditional consent to conversion to academy status, providing certain conditions are met: -
 - The school consults MAST throughout the process as per the guidance;
 - A MAST- led or Diocesan-led option is being pursued;

- MAST approves the Articles of Association of the MAT and can be assured that Methodist schools are protected;
- MAST approves the membership/directorship structure and local governance arrangements of the trust;
- That a members agreement is in place where one is required;
- The school pays MAST's legal/administrative fees and a fee for work carried out by TMPC officers;
- The school or the MAT undertakes to subscribe to the MAST Partnership Scheme;
- MAST's Conditional Consent to convert may be withheld if it has concerns about the long-term sustainability or capacity of any proposed MAT, or its ethos in protecting the Methodist character of the school. In granting or withholding approval, MAST will take into account the nature of Methodist provision and the strategic interests of Methodist schools in an area.
- MAST will carry out its own due diligence in respect of requests from Methodist schools to convert to academy status and will seek a meeting with governors and the Headteacher (and may request to see a written statement of the educational plan and vision for the MAT). As Standing Orders require the Methodist Council to have oversight of the standards and ethos of all the schools, due diligence will encompass issues of land and trusteeship; trust capacity and performance; trust identity, ethos and planning. It will also take into account the school's and the trust's due diligence in the academisation process.
- For all MATs that are not a Methodist led MAT, MAST will require a Members' Agreement to be in place, which commits the Members (i.e. the legal owners of the MAT) to ensure the implementation of the Methodist objects of any Methodist school in the MAT. This will be secured by a memorandum of understanding.
- Where a MAST school is underperforming according to national criteria (or placed in an Ofsted category, triggering the Secretary of State's duty to issue an academy order), MAST will ensure that either:
 - (1) EET or the ILET become the Sponsor and the school converts into one of the Methodist MATs.
 - (2) For joint schools' consideration will also be given to Diocesan MAT sponsors
- MAST will not permit Methodist schools to be sponsored by non-Church (secular) national academy chains. If the Regional Director proposes this (because no other solution is potentially available), the Board (at a quorate meeting) will consider the merits of the case and make a determination, using its statutory powers if necessary but would only agree in exceptional cases.
- If there is a disagreement about the basis of MAST consent to an academy proposal, then the governors can make an approach to the MAST Board to discuss this. The Board will request that a written case is produced, and that the governors meet with representatives of MAST before a decision is made.
- In the event of a former VA or VC school needing to be re-brokered, the Regional Director should seek the agreement of MAST about which Trust will take the Academy (in keeping with the nationally agreed MOU) and the new Trust will be subject to all of the conditions listed above.

APPENDIX 2: REGISTER OF INTEREST FORM

Schools must not register their interest with the DFE or inform the LA until advised by the MAST Executive Team

SCHOOL DETAILS				
School Name				
URN				
School Address				
Phase (eg primary/junior/etc)				
School type (eg VA, VC, Foundation/Academy)				
School religious foundation (eg Methodist/ Joint Methodist and Church of England/ Ecumenical)				
Details of any formal relationships such as a federation/ Executive Headteacher etc				
Local Authority				
Diocese (for joint schools)				
KEY PERSONNEL DETAILS				
Headteacher				
Email				
Telephone number(s)				
Chair of Governors/Chair of Trust				
Email				
Telephone number(s)				
Circuit Superintendent				
Email				
Telephone number(s)				
SIAMS and OFSTED DETAILS				
Number on Roll		Latest SIAMS overall judgement incl date		Latest overall Ofsted judgement incl date
Is the school due a SIAMS inspection YES / NO If yes, approx when:			Is your school due an Ofsted inspection YES / NO If yes, approx when:	

OTHER INFORMATION		
Date on which the change to academy status was discussed at a quorate meeting of the full governing body		
Have governors formed an Academy Working Group?	Yes	If yes, what is the constitution of the group and who has been appointed chair?
	No	
If a joint school, have you informed the Diocese of your intentions?	Yes	Please provide contact details in the Diocese (name, email and telephone number)
	No	
What is the estimated provisional conversion date?		
Please add any other comments Please continue on a separate sheet if required		
Signed by the Chair of Governors		Dated
Full Name		

Please send this form electronically to oolayinka@methodistschools.org.uk marking the email 'School Register of Interest in Academisation – name of school'.

APPENDIX 3: APPLICATION TO MAST TO PROCEED WITH ACADEMISATION

SCHOOL DETAILS	
School Name	
URN	
School Address	
Phase (eg primary/junior/etc)	
School type (eg VA, VC, Foundation/Academy)	
School religious foundation: (eg Methodist/ Joint Methodist and Church of England/ Ecumenical)	
Details of any formal relationships such as a federation/ Executive Headteacher etc	
Local Authority	
Diocese (for joint schools)	
PERSONNEL DETAILS	
Headteacher	
Email	
Telephone number(s)	
Chair of Governors	
Email	
Telephone number(s)	
Circuit Superintendent	
Email	
Telephone number(s)	
Diocesan link officer	
Email	
Telephone number(s)	
DISCUSSIONS WITH MULTI ACADEMY TRUSTS (to be completed by joint schools)	
Name of Trust	What discussions have taken place? What key information informed your decision to join or not join?

Name of Trust	What discussions have taken place and what are the outcomes of these? What key information informed your decision to join or not join?
Name of Trust	What discussions have taken place and what are the outcomes of these? What key information informed your decision to join or not join?

Please include information regarding all Trusts that you had a discussion with

GOVERNORS' OUTLINE INTENTIONS/ACTIONS/KNOWLEDGE

Name of MAT intended to join	
Have governors carried out any consultations? if so, please provide details	
What is the provisional conversion date?	
Have governors identified who owns their school site, and if so, please provide details.	
Are there any specific land or building issues or peculiarities we should be aware of?	
Who appoints Foundation Governors to the governing body?	
Is there a nursery provider/childcare/ community provision on site? If so, who runs this/them?	

FINANCIAL continue on a separate sheet if required

Are there any concerns that you forecast which the due diligence undertaken by the MAT will reveal?	
What reserves does the school hold?	
Is the school currently operating a surplus or deficit budget? What is the amount of the surplus or deficit?	
Please provide projected balances for both in year and carry forward for the next 3 years	
What are governors' financial and business plans for the conversion?	

DOCUMENTS IN SUPPORT OF APPLICATION

Please list any documents attached in support of this application e.g. consultation brochure, power point slides (please include copies of any resolutions by the governors and the proposed MAT)	Please list documents to be attached
Other relevant comments	

SIGNATURE

Signed by the Chair of Governors	
Full name (print)	
Dated	

Please send this form electronically to oolayinka@methodistschools.org.uk marking the email 'School Application to MAST to Proceed to Conversion – Name of school'.

APPENDIX 4: RECEIVING MAT APPLICATION TO MAST TO PROCEED TO CONVERSION

FOR COMPLETION BY THE RECEIVING MULTI ACADEMY TRUST	
Name of the MAT	
CEO	
Contact details	
How many academies are in the MAT? (please include the phases eg infant, junior, primary, secondary etc)	
Provide details of the most recent SIAMS and Ofsted (last S5 and latest S8) results for the academies within the MAT	
What major challenges does the MAT face in the next 1-3 years?	
What is the MAT growth strategy?	
What will the MAT offer to the new academy?	
What will the academy bring to the MAT?	
Give brief details of the primary support available in the MAT and attach a copy of the MAT improvement strategy	
Give details of the support available in the MAT with regards to SIAMs and upholding the Methodist trust deed?	
What is the MAT's preferred provisional conversion date for the academy?	
Please attach a copy of the MAT's resolution in relation to conversion	
Any other comments	

Signed by the CEO	
Full name (print)	
Dated	

Please send this form and any accompanying documents electronically to oolayinka@methodistschools.org.uk marked 'MAT Application for DBE approval to proceed to conversion [insert school name]'

APPENDIX 5: GOVERNOR CHECKLIST

Following receipt of a MAST conditional consent letter, the Chair of Governors will initiate the following (some of these steps take place simultaneously):

Action	By Whom	Tick when complete	Date
Full governing body considers the MAST Policy for Academisation			
A quorate meeting of the full governing body resolves by majority vote to progress exploring academy conversion, or (ii) not to explore progressing at this stage and to place the item on the Agenda of a meeting in the next year.			
If the governing body has resolved to progress exploring conversion (or a Directive Academy Order (DAO) is in place), the GB should form an Academy Working Group (AWG) which the Chair of Governors (CofG) should chair.			
Research and next steps			
AWG researches: <ul style="list-style-type: none"> • Which schools (church and community) in the area are considering conversion to academy status – hold conversations with any interested schools. • MAT provision in the area 			
For joint schools ensure that discussions are held both with Methodist led trusts and Diocesan led trusts			
AWG undertake discussions with MAST			
MAST approval process - must be completed before contacting the DfE or notifying the LA			
Register interest			
CofG completes MAST Form 'Register Interest in Academy Status' and sends to MAST via oolayinka@methodistschools.org.uk marking the covering email 'Register Interest in Academy Status [insert school name]'			
Meeting with MAST to set action points takes place			
The AWG collates all information and implications for the school and presents this at a quorate meeting of the full governing body			
The outcome of the above meeting records the resolution in the minutes (a majority vote required) Copy of the minute is sent to MAST via oolayinka@methodistschools.org.uk marking the covering email '[school name] – Governors' Resolution on academy conversion'			

Action	By Whom	Tick when complete	Date
Application for MAST approval to proceed to conversion			
<p>Chair completes Form 'Application for MAST approval to proceed to conversion' sending this electronically to MAST via oolayinka@methodistschools.org.uk marking the covering email '[insert school name] Application for MAST approval to proceed to academy conversion'</p> <p>If not already sent, a copy of governors' resolution and the resolution of the potential receiving MAT should be sent to MAST via oolayinka@methodistschools.org.uk</p>			
<p>MAST responds within 12 working days confirming the date the application will be considered by them.</p> <p>NB MAST may request that the chair of governors and MAT representatives attend the meeting.</p>			
<p>MAST will dispatch a written response to the chair of the GB and CEO of the receiving MAT within 12 working days of the date of consideration of the application by MAST.</p>			
Registration with the DfE, obtaining an Academy Order and notifying the LA			
<p>The governing body must be cognisant of both MAST and DfE deadlines</p>			
<p>If conditional consent to progress is given by MAST, the school registers its interest on the DfE website (unless the school is 'required' to convert to academy status, when this interest is automatically recorded)</p> <p>A copy of the DfE Application forms must be sent to the MAST via oolayinka@methodistschools.org.uk marking the covering email 'Copy of DfE Application Form to convert to academy status [insert school name and MAT]</p>			
<p>The DfE assign a Project Lead Officer (DFE PLO) to the school (a school will have a DfE PLO assigned at the time of issue of the DAO).</p>			
<p>Agree provisional conversion date (negotiated between MAST, DfE, governors, MAT and solicitors)</p>			
<p>The school informs the LA of the decision to convert and provisional conversion date</p>			
<p>The GB writes to the Secretary of State for Education with a copy of the governors' resolution, seeking conversion to academy status</p>			
<p>The Secretary of State for Education writes to the GB with the outcome of their decision</p>			
<p>The Secretary of State for Education produces an Academy Order</p>			

Action	By Whom	Tick when complete	Date
Consultation and General Actions			
The GB/MAT carry out an audit of school personnel to establish suitably qualified person(s) with availability to support the HT, CofG (and where appropriate the project manager) throughout the conversion process			
Commence a list to assist in due diligence: <ul style="list-style-type: none"> - contracts/services/utilities/hire and letting agreements/licences - staff details (incl. pensions/childcare vouchers) - shared facilities - any buildings projects - loans - grants received - potential claims 			
The school/MAT carry out consultations with: <ol style="list-style-type: none"> 1) staff 2) parents 3) pupils 4) local church(es) 5) wider community Record the meetings dates/times/venues including numbers attending and the responses. Include the GB's consideration and actions resulting from the consultations. Before conversion can take place written confirmation that due diligence is complete must be submitted to oolayinka@methodistschools.org.uk marking the covering email 'Due Diligence confirmation [insert school name and MAT name]'			
Applying for Grants			
GB/MAT make an application(s) to the Education Funding Agency (ESFA) for: <ul style="list-style-type: none"> • set up grant of £25k • school improvement grant of £45k (for schools with a DAO) • any other grants where appropriate Current details of grants available for conversion are available on the DfE website www.gov.uk			
Appointing Solicitors (and project manager where appropriate)			
Upon receipt of the £25k set up grant, the GB/MAT engage Solicitors (and Project Manager if decision taken to appoint such a person)			

Action	By Whom	Tick when complete	Date
Legal / documentation			
<p>Solicitors will ensure the following documentation is in place:</p> <ul style="list-style-type: none"> - Completed Land Questionnaire - Memorandum & Articles of Association (if required) - Deeds of Variation (if required) - Supplemental Funding Agreement - Church Supplemental Agreement (for the trustees' land) - Leases (if required) - Trust Modification Order (if required) - Side Letter for the RPA (if required) - Commercial Transfer Agreement - Agreements in relation to any outstanding loans/building projects/shared facilities - Novation of any contracts that are required - If a school is subject to PFI, additional legal documentation will be required <p>Report on title is prepared to establish who owns the school site / extent thereof and if any transfers/regularisation is required by the LA in favour of the trustees</p> <p>Methodist Church land use remains on an 'as is' basis as identified and protected in the Church Supplemental Agreement</p> <p>Where there is land owned by the Local Authority (often the playing fields) this will be subject to a 125year Lease</p> <p><i>NB land matters can be complex and can lead to delays in provisional conversion dates.</i></p>			
<p>Checks of the Trust Deed and Instrument of Government take place, to identify:</p> <ul style="list-style-type: none"> - trustees (including land trustees) - all bodies appointing foundation governors - MAST <p>Dispatch letter seeking formal written approval to the conversion from these bodies</p> <p>Formal written response is received from:</p> <ul style="list-style-type: none"> - trustees - all bodies appointing foundation governors <p>Governors can only proceed to conversion if approval is received from each of the bodies above as the DfE will ask for evidence of this.</p>			
MAT arrangements			
<p>The MAT confirms provisional arrangements for membership of the MAT:</p> <ul style="list-style-type: none"> - Due diligence - Banking - Budgets (incl. indicative budget from ESFA) - HR (incl. all staff matters/pensions) - Insurance - IT systems/services - Reporting (financial/data) mechanisms 			
Staff			
<p>TUPE meetings with Unions and staff are undertaken by suitably qualified/skilled person(s)</p>			
<p>Non-teaching staff pensions actuarial assessment requested (any deficits will be transferred to the MAT, but be the academy budget's responsibility)</p> <p>Teachers' Pensions deficits remain with central Government</p>			

Action	By Whom	Tick when complete	Date
Getting ready for conversion			
Further information meeting with parents (as required)			
Written confirmation from the MAT that due diligence is complete, and a copy of the DfE Application to convert to academy status have been submitted to the MAST via oolayinka@methodistschools.org.uk (see above)			
MAT commences governor appointments to the Local Academy Board (LAB) noting that Methodist foundation governors are appointed by the circuit			
LAB DBS checks completed			
MAT provider of Payroll is informed of conversion date			
Staff records are checked for accuracy with all staff members			
Pass all staff information to Payroll provider			
Pass all Payroll information onto MAT Payroll provider			
Registered with Teachers' Pensions and LGPS			
Draft Scheme of Delegation between the MAT and the academy (dealing with delegation of specified items to the HT and LAB)			
School/MAT close down LA budget and open academy budget			
The school transfers from the current LA IT finance/data systems to the systems operated by the relevant MAT			
Preparations for opening: signage, logos, website, communication to parents			
Conversion			
The DfE notifies the LA to cease to maintain the school			
The school converts to academy status			
Current GB ceases to exist and comes into being			
Check details on GIAS for new URN			
Received Welcome letter and pack from ESFA			
Adequate insurance arrangements are in place			
All existing Leases/Agreements transferred to academy/MAT			
Complaints procedures in place			
Academy/MAT joins the MAST Partnership Agreement			
The school has an appropriate insurance in place			
Formal Opening arranged			
Website reflects academy status			
Upload Supplemental Funding Agreement to the academy website			
Ongoing requirements and deadlines are available on the DfE and ESFA websites www.gov.uk and https://www.gov.uk/government/organisations/education-funding-agency			

APPENDIX 6: CONTACT DETAILS FOR METHODIST LED TRUSTS

Name of Trust	Epworth Education Trust (EET)
CEO	Mrs Julie-Ann Hewitt
Contact details	07554 421440 ceo@epworthtrust.org.uk
Website	www.epworthtrust.org.uk

Name of Trust	Inspiring Lives Education Trust (ILET)
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