



Cheshire Academies Trust

# PROCESS FOR CONVERSION

In advance of becoming a member of Cheshire Academies Trust (CAT) a school should undertake all the investigations they need to ensure that being a CAT member is the right fit for their ethos and culture and the CAT Executive Team will work with you to do the same for CAT. This can involve informal and formal meetings between senior leadership and governing body members, visits to CAT schools or 'soft collaboration' via attendance at CAT SENDCo, EYFS or subject leadership team meetings, for example. The school will also want to consult with their stakeholders and wider community.

At the point that the governing body has made a formal decision to convert, the following process will be initiated:

1. **SCHOOL** to express an interest in joining the Trust by contacting Luci Jones ([lucijones@cheshireacademiestrust.co.uk](mailto:lucijones@cheshireacademiestrust.co.uk)) and to minute and send governing body decision to CAT ([juliegriffiths@cheshireacademiestrust.co.uk](mailto:juliegriffiths@cheshireacademiestrust.co.uk))
2. **SCHOOL** to read DfE [Six Steps to Conversion](#) and to register an interest using the [Register your interest form](#) on the DfE website
3. The **DfE** will then contact CAT and the Trustees will consider the application and advise if it is ok to proceed
4. **SCHOOL** should identify a person as the main point of contact for conversion
5. With the support of CAT the **SCHOOL** will submit a formal application to convert to the DfE. This should include the proposed conversion date as advised by CAT.
6. The **DfE** will send the application to the RSC to approve
7. **CAT** will commence formal due diligence (academic, organisational structure, pensions, finance, property) for the CAT Board to consider and approve. At this point CAT will advise the SCHOOL of the Boards decision to proceed and will inform the LA
8. With support from the CAT central team the **SCHOOL** will provide all requested details to the DfE
9. The **DfE** will confirm the project lead who will seek clarification and answers to any DfE questions
10. If the RSC approves the application the **Secretary of State** will issue the Academy Order to the SCHOOL and pay a conversion grant of £25k to CAT

11. The **SCHOOL** should advise CAT when they are in receipt of the Academy Order
12. **CAT** will then commence the conversion process and instruct solicitors. The conversion process usually takes around 4 months
13. If not completed previously the **SCHOOL** should consult with stakeholders and the outcome of the consultation should be reported to the CAT Board (CAT will support with this process) and the DfE
14. **CAT** will support the SCHOOL through TUPE consultation meetings
15. **CAT** will finalise staff transfer details and liaise with the current employer (LA) regarding the transfer
16. **SCHOOL** should identify all assets, liabilities, contracts and licences that will transfer to the ownership of CAT under the transfer of commercial assets (CTA). SCHOOL with the support of CAT should liaise with the LA regarding approved funding for capital projects
17. **CAT** and their solicitors will prepare the CTA, land questionnaire, leasehold documents and supplemental funding agreement to send to the DfE
18. The funding letter will be received from the **DfE** and CAT will set up an academy bank account and arrange for purchasing cards
19. **SCHOOL** should ensure any existing direct debits, loans, purchasing cards are cancelled and/or paid off.
20. **CAT** will reconcile the school funds for consolidation into the CAT accounts
21. Payroll will be transferred to **CAT** under their PAYE reference number with HMRC and the school will be set up within the CAT employer accounts for teacher's pensions and the local government pension scheme
22. **CONVERSION PROCESS IS COMPLETE**