

**PETERBOROUGH DIOCESE EDUCATIONAL TRUST ("PDET")
[SCHOOL NAME] - ACADEMY CONVERSION
KEY STEPS FOR CONVERSION ON 1 DECEMBER 2014**

ACTION		RESPONSIBILITY				INDICATIVE TIMING
		School	DfE	LA	PDET	
ACADEMY ORDER		✓	✓		✓	
CONSULTATIONS	Parents/Stakeholders	✓			✓	4-5 term time weeks before Governing Body of your School make the final decision to convert to an academy
	Staff – informal	✓			✓	
	Staff – formal TUPE (to commence, in liaison with HR consultant as appropriate) ¹	[✓]		[✓]	✓	
SUPPLEMENTAL FUNDING AGREEMENT (between DfE and PDET)	Instructions	✓			✓	
	Initial draft				✓	
	Comments	✓			✓	
	Initial draft to DfE				✓	Wednesday 1 October
	Approval		✓			
	Signature by PDET and EFA		✓		✓	Monday 10 November
PROPERTY	Ascertain Title	✓		✓	✓	
	Land Questionnaire	✓			✓	Wednesday 1 October
	Draft Lease – main terms agreed – if applicable			✓	✓	Monday 3 November
	Signature of Lease – if applicable			✓	✓	Monday 10 November
COMMERCIAL TRANSFER AGREEMENT (between PDET, the LA and Governing Body your School)	Provide due diligence to PDET	✓				
	Provide list of transferring employees (TUPE due diligence spreadsheet/names and job titles) to PDET	[✓]		[✓]		
	Initial draft of the CTA				✓	
	Comments/Negotiation of the CTA	✓		✓	✓	
	Agree the CTA	✓		✓	✓	Monday 3 November
	Signature of the CTA	✓		✓		Monday 10 November

¹ Who carries out the TUPE consultation process depends on who is the employer of the school staff- the LA or the Governing Body

ACTION		RESPONSIBILITY				INDICATIVE TIMING
		School	DfE	LA	PDET	
STAFFING						
- TUPE	Liaise with HR consultant	[✓]		[✓]	✓	
	Carry out due diligence and complete spreadsheet for transferring employees	✓		✓	✓	
- PENSIONS	Notify Teachers' Pension Scheme of your School's conversion	✓			✓	
	Notify LGPS of your School's conversion	✓			✓	
	Obtain and review actuarial valuation for LGPS	✓		✓	✓	ASAP
CONTRACTS	Identify existing contracts	✓		[✓]	✓	
	Due Diligence - check transfer provisions in existing contracts to be transferred	✓		[✓]	✓	
	Send transfer letter/deed to third parties (SK to advise)	✓			✓	
	Negotiate with contractors, as applicable	✓			✓	
GOVERNING BODY MEETING	Initial meeting/briefing	✓			[✓]	
	Appointment of Steering Group/authorised governors	✓				
	Meeting to consider Outcome of Consultations and resolve to convert	✓			[✓]	