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Convert to an academy: guide for schools

From: **Department for Education**
Updated: **26 November 2015, see all updates**

3. Set up or join an academy trust

What actions to take following approval of your academy conversion application.

Academy order

It will take somewhere between 2 and 6 weeks for us to assess your application and grant your academy order, if you have been successful.

Your project lead will get in touch if they need to check anything in your application.

Support grant

As soon as we have granted your academy order, your project lead will arrange for you to receive a £25,000 support grant for you to spend on the conversion process.

We will send the grant to your school's existing bank account (the one you provided in your application form). You should receive this grant within 14 working days.

Funding allocation letter

The Education Funding Agency (EFA) will send you your funding allocation pack once we have approved your academy order. This pack will include your indicative funding allocation letter, which confirms how much funding your academy is likely to get after conversion.

If you have any queries about your funding allocation, contact EFA:
academy.questions@education.gsi.gov.uk.

Primary academy chain development grant and small school supplement (primary schools only)

You can apply to get extra funding from the primary academy chain development grant (<https://www.gov.uk/government/publications/academy-conversion-primary-academy-chain-development-grant>) if you are one of the following:

- a primary school planning to set up a multi-academy trust (<https://www.gov.uk/guidance/convert-to-an-academy-information-for-schools/1-before-you-apply#consider-the-different-types-of-academy>) (MAT) made up of at least 3 schools
- part of a group of 2 or more primary schools planning to join an existing MAT at the same time

If your school has fewer than 210 pupils, you could also apply for funding from the small school supplement grant (<https://www.gov.uk/government/publications/academy-conversion-small-school-supplement-for-primary-schools>).

You should speak with your project lead before applying for either of these grants.

Prepare to set up your academy trust

Once we have granted your academy order and you have received your support grant, you can start the process of setting up your academy trust.

Appoint a solicitor

If you have decided to hire a solicitor, you should formally appoint them now.

Statutory consultation

Your governing body must consult formally about your school's plans to become an academy with anyone who has an interest in your school. This will include staff members and parents, but you should also involve pupils and the wider local community.

You must complete the formal consultation process before you sign your academy funding agreement, so we suggest you begin the consultation now to allow time for everyone with an interest to respond.

Apply to open your academy's bank account

We strongly recommend that you start the process of opening a bank account for your academy at this stage.

You will not be able to finalise your bank account application until you have finished setting up your academy trust and have registered your academy as a limited company. However, because this can take time, we advise that you start the process now.

Complete and return the land questionnaire

You should first ask your solicitor or legal adviser to complete the land and title checks.

You can then instruct your solicitor or legal adviser to complete and return the academy land questionnaire (<https://www.gov.uk/government/publications/academy-land-questionnaires>) to your project lead. Your project lead will let you know what the deadline for submitting your land questionnaire is.

Before completing the questionnaire, we suggest that your solicitor or legal adviser reads the academy land transfer advice document (<https://www.gov.uk/government/publications/academy-land-transfer-advice>). This document will help you and your project lead identify any potential problems with the ownership or transfer of the land.

Get in touch with your project lead if you need advice.

The deadline by which you need to complete and submit the land questionnaire is in the 'Academy conversion: important dates' (<https://www.gov.uk/government/publications/academy-conversion-important-dates>) document.

Complete and submit your draft memorandum and articles of association

If you are establishing a new academy trust, instruct your solicitor or legal adviser to complete and return the model memorandum and articles of association (<https://www.gov.uk/government/publications/academy-model-memorandum-and-articles-of-association>) to your project lead.

Church of England and Catholic schools should use the model memorandum and articles of association for church schools (<https://www.gov.uk/government/publications/church-academies-model-documents>).

Private finance initiative (PFI) schools should use the model memorandum and articles of association for PFI schools (<https://www.gov.uk/government/publications/private-finance-initiative-pfi-academies-model-documents>).

We do not expect you to make any changes to the model documents except in exceptional circumstances. If your solicitor or legal adviser believes that your school should amend the model documents, please make sure they outline their suggested amendments and the reasons for them in the schedule of changes (<https://www.gov.uk/government/publications/academy-model-documents-schedule-of-changes>).

If you have used the schedule of changes, submit it to your project lead along with your model memorandum and articles of association.

Your project lead will check the draft documents and consider any changes you have requested. They may reject changes and ask you to revert to the wording of the model document.

Your project lead will clear your final memorandum and articles of association.

The deadline by which you need to complete and submit your draft memorandum and articles of association is in the 'Academy conversion: important dates' (<https://www.gov.uk/government/publications/academy-conversion-important-dates>) document.

Complete and submit your draft funding agreement

Instruct your solicitor or legal adviser to produce a draft funding agreement.

Depending on what sort of academy you will be, you should use either the single model funding agreement (<https://www.gov.uk/government/publications/academy-and-free-school-funding-agreements-single-academy-trust>) or the multi-academy trust model funding agreements (<https://www.gov.uk/government/publications/academy-and-free-school-multi-model-master-funding-agreement>).

Church of England and Catholic schools should use one of the model funding agreements for church schools (<https://www.gov.uk/government/publications/church-academies-model-documents>).

Private finance initiative (PFI) schools should use one of the model funding agreements for PFI schools (<https://www.gov.uk/government/publications/private-finance-initiative-pfi-academies-model-documents>).

We do not expect you to vary from the model agreements, except in exceptional circumstances. If your solicitor or legal adviser believes that your school should amend the model documents, make sure they outline their suggested changes and the reasons for them in the schedule of changes (<https://www.gov.uk/government/publications/academy-model-documents-schedule-of-changes>).

If you have used the schedule of changes, submit it to your project lead along with your draft funding agreement.

Your project lead will check the draft funding agreement and consider any changes you have requested. They may reject changes and ask you to revert to the wording of the model document.

Your project lead will clear your final funding agreement.

The deadline by which you need to complete and submit your draft funding agreement is in the 'Academy conversion: important dates' (<https://www.gov.uk/government/publications/academy-conversion-important-dates>) document.

Model documents to make changes to your admissions policy (grammar schools only)

If you are a grammar school, you may need to make changes to your admissions policy before you can convert to an academy.

Ask your solicitor to complete the model document (<https://www.gov.uk/government/publications/academies-ending-selection-at-former-grammar-schools>) that relates to your type of grammar school. Once the model is complete, return it to your project lead along with your draft funding agreement.

Get in touch with your project lead if you need advice.

Set up the academy trust (if you are establishing a new academy trust)

Register with Companies House

Once your project lead has confirmed that DfE has approved a final version of your memorandum and articles of association, you should register your academy trust with Companies House (<http://www.companieshouse.gov.uk/>).

Appoint your academy trustees

You should now appoint the academy's trustees. The memorandum and articles of association that DfE cleared will say:

- how many people will make up the academy trust
- who will be in charge of appointing your academy trustees and how

If you're a foundation school or a voluntary school with a foundation, the foundation should also be involved in appointing the trustees.

If you're a faith school, you must involve the diocese as well.

Get in touch with your project lead if you need advice.

Appoint your academy's local governing body (for all schools in a multi-academy trust)

If you're converting as part of a multi-academy trust, your board of trustees should now appoint the members of the governing bodies of each academy in your multi-academy trust. These are called local governing bodies.

The trustees' choice of governors must comply with the rules around the composition of academy governing bodies set out in section 2 of the 'Governors' handbook (https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/311400/Governors_Handbook_May_2014_FINAL.pdf).

Get in touch with your project lead if you need advice.