

THE >>>>>>>>> TRUST (VVV)

Name of School

TRANSFER TIMELINE

DATE BY	LEGAL DELIVERABLE (Ward Hadaway)	STAKEHOLDER (Students, Parents, trust, TCG and wider community) COMMUNICATION	GOVERNANCE DELIVERABLE	HR DELIVERABLE	Finance Deliverables
28 September	Ward Hadaway (WH) to issue engagement letters to				Complete 6/11
	WH to issue transfer checklists in relation to legal documentation to Trust for completion.				Contracts list signed off 6/11
29th September			School Improvement Board Meeting		
5 October	WH to request outstanding construction documentation from the local authority (LA) and contact the LA in relation to the land			Set up meeting with school to discuss TUPE process & agree timeline.	Scope of site searches agreed
13th October			School Improvement Board Meeting		

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14 October – Board paper	<i>Any headline issues for Board</i>	<i>Any headline issues for Board</i>	<i>Any headline issues for Board</i>	<i>Any headline issues for Board</i>	Update o/s due diligence items: 1. EFA grant 2. BFET balances (EFA/DFE) – MG confirmed to GS detail of BFET relationship and reflected in draft agt
15th October		Y7 settling in evening at School			
16 October	Trust to return transfer checklist and information requested.			Meet School (7 Oct) to agree actions / timescales for TUPE process and gather additional information on “measures”. Any update on due diligence items?	
	WH to issue final construction due diligence report.			First draft of Regulation 13 letter and FAQs (to go to lawyers) Dates for union & staff consultation meetings scheduled – staff updated on plans for formal	

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26 October	WH to submit draft Deed of Variation & Novation (of the School Funding Agreement(s)) and draft Transfer Agreement to Trust for review and approval.				1. Confirmed SFA to existing Master FA (Aug 2013) includes unfettered use of carry forward
28 October			Fortnightly meetings of FN with CofG and HT		
30 October	WH to issue addendum to construction due diligence report regarding appointments/sub-contracts (if outstanding documents received sufficiently in advance of this date).			Regulation 13 & FAQs signed off (all preparation for consultation completed) and final version sent to trade unions. Decision making on payroll transfer completed	
3rd November			School Improvement Board Meeting		
5 November		Trust Board at School for meeting and tour, also = photo opp for internal comms piece at TCG and			

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9 November	WH to submit draft Deed of Variation & Novation (of the School Funding Agreement(s)) to EFA for approval.			Meeting with Strictly Education to agree transition plan (6 Nov) TUPE consultation process formally opened: meeting with Trade Unions and open forum with staff held. Then issue letter / FAQs to staff unable to attend briefing.	
Mid November			Tel working group meeting chaired by FWN & DH		
17th November					
27th November				Any individual meetings completed; formal response from unions received. Any updates to due diligence information (feed to Louise for Commercial Transfer Agreement)?	

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TBC					Induction of School FD into Trust – ?? to contact ?? Begin budget planning with School FD & Principal (Trust options) Plan implementation of Trust finance systems
1 December 2 – Board paper				Prep to attend SCITT Day	Final draft central budget – Trust Board
Early December				Written response on queries arising provided to unions / staff. Follow up meeting with trade unions held if required to resolve any issues. Meet School to agree plans to move on to Trust HR	Define and implement CAT process: - Budget/forecast - Financial regulations Reserves policy Procurement – include School in revised Trust approach
8 th December					
10 th December		Year 11 Parents' evening Trust attendance		Update School / Unions on additional policies approved by Trust Board (prior to closing consultation)	
15 th December		Trust attendance reqd at SCITT day	School Improvement Board Meeting 5pm	Update meeting on payroll transfer (14 Dec)	

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18 th December				Write to close formal consultation (no legal requirement to consult for specific period, but must be “full & meaningful” – can continue in to Jan if necessary) – but leave open invitation to raise any questions between now and actual transfer date	
7 th January		Year 8 Parents’ evening ?? to attend			
8 January	Legal documentation to be substantially agreed.			Agree plans for issuing letters / contracts to staff.	
11 – 15 January	Trust Board Meeting to approve transfer of School & execute legal documentation (subject to final amendments).	FWN to undertake Year Grp assemblies at School to explain The Grp, The trust and what is in it for the students ?? TBC	Shadow governing body or working group meeting chaired by FWN. 14 January at 5pm.	Any updates to due diligence information (feed to Louise for Commercial Transfer Agreement)?	Trust Finance meeting to be held at school
14 January			Trust Improvement Board Meeting 3.30pm	Update meeting on payroll transfer (13 Jan)	
Mid January		Parents and carers meeting at School. Meet the trust and the grp. Moved from			

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18 – 22 January	Anticipated Secretary of State sealing date of the Deed of Variation and Novation (of the School Funding Agreement(s)).				
31 January	Deed of Variation & Novation (of the School Funding Agreement(s)), Transfer Agreement, Deed of Novation of the Commercial Transfer Agreement, Assignment of Warranties, new warranties in favour of Trust, Lease and Transfer Agreement dated/ completed and Notices of			Notifications to pension providers, HMRC (etc), re. change of employer completed	
1 February	Completion of the transfer of School to Trust.	?? and ??to officially open school as Trust academy. Availability TBC. There will be an official opening on this day tho.		Issue letters / contracts confirming new employment to staff, and launch employee benefits. TUPE transfer completed / employment by the Trust commences Payroll transferred to Strictly Education Ltd.	

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4 February		1AS Auditorium Presence by Trust academics including Swing band, HTs/Principals and pupils/students Sponsor would like this prior to Xmas. Discussions	Initial GB meeting 4.30pm at School	Feb onwards: - Induction to the Trust - Support to adopt Trust's HR policies & procedures Note: half term is w/c 15	GB – share/engage on 2015/16 forecast and basis for 2016/17 budget
23 rd February			School Improvement Board Meeting?		
25 th February		Year 11 Parents' evening (2)			
26 th February				New pay date	
Early March			2 nd GB meeting TBC		GB - Finance induction session – budget, Trust processes
8 th March			School Improvement Board Meeting?— Finance sub-committee meeting TBC		
22 nd March			School Improvement Board Meeting?		
23 rd March		Year 9 Parents' evening			
24 March		INSET Day at School Trust Induction			
Early April			3 rd GB meeting TBC		

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April	Lease and Novation of the Building Contract to be completed once the defects have been signed-off as completed and the end of the defects rectification period has been certified.				
19th April			School Improvement Board Meeting?		
21st April		Year 7 Parents' evening			
3rd May			School Improvement Board Meeting?		
Mid May			4th GB meeting TBC		Next year's budget principles, assumptions,
17th May			School Improvement Board Meeting?		
7th June			School Improvement Board Meeting?		
9th June		Year 10 Parents' evening			
Early June			5 th GB meeting		Three year budget approved by GB

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21st June			School Improvement Board Meeting?		
5th July			School Improvement Board Meeting?		
19th July			School Improvement Board Meeting?		