

Project template

Please use this template for 'all' conversion and transfer projects.

Section 1 – Recommendation

Recommendation:	
Version:	
Author:	
Is AO required?	
Cleared by:	
Date of AB:	
Previous AB date:	

Section 2 – Project details

Project name (URN), LA	
Name and number of sponsor/MAT	

Academy type and route

Delete where necessary.

<p>Transfer from [Trust] – grant sought – [insert grant amount] *</p> <p>Conversion grant only – [£25k] *</p> <p>Fast track sponsored - School improvement grant – £70k (primary) / £80k (secondary/all-through) *</p> <p>Intermediate sponsored - School improvement grant - £90k (primary) / £115k (secondary/all-through) *</p> <p>Full sponsored – Project development grant - £110k (primary) / £150k (secondary/all-through) *</p> <p>Receiving trust received any DfE funding? * e.g. TSI/TEG/TCAF or other funding?</p> <p>*Delete where necessary</p>
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Proposed open date	
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General information

School phase:	
Age range:	
School type:	
NOR (% full):	
Percentage of free school meal pupils at the school (%FSM)	
Capacity:	
Published Admission Number (PAN):	
PFI?:	
Viability issues?:	
Deficit?:	
Is this a Diocesan MAT?	
If yes, % of schools that are G or O?	
Distance to proposed MAT or sponsor:	
MP:	

Section 3 – School performance (Ofsted information)

Latest short inspection date	
Latest full inspection date	
Overall effectiveness	
Quality of education	
Behaviour and attitudes	
Personal development	
Effectiveness of leadership and management	
Additional information	

Section 4 – Rationale

Rationale for project:	
Governance:	
Key people:	
Feeder links:	
Rationale for sponsor or MAT:	

Risks and issues

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Legal requirements

Has the Governing body resolution been received?	
Has the school consulted?	
Has the school received Diocesan consent?	
Has the school received Foundation consent?	

Equalities duty

Has an Equalities Impact Assessment been considered?

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Section 5 – financial health

Basic Regions Group financial health assessment

Date completed:	
Template completed by:	
Approved by:	

	Actuals - Financial Statements: 2020/21	Actuals - Financial Statements: 2021/22	Forecast Finances 2022: 2022/23	Forecast Finances 2022: 2023/24	Forecast Finances 2022: 2024/25
Total Revenue Income					
In-year surplus/deficit					
Carried forward surplus/deficit					
Carried forward as % of total income					

Is the trust in ESFA intervention?	Yes/No	
Has the trust received a Notice to Improve?	Yes/No	
Are there any other concerns relevant for Advisory Board to consider?	Yes/No	
Forecasted staff expenditure as % of income		
Has the trust had an Schools Resource management Advisor (SRMA) deployment? If yes, when was this?	Yes/No When?	
Has the trust conducted an External Review of Governance? If yes, when?	Yes/No When?	
Does the trust charge a top slice?	Yes/No	

Delivery Officer assessment of the project

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Other views from SFSO/ESFA on financial issues at the trust

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Section 6 – Project funding (for full sponsored projects only)

Deliverables	Forecast (£)
Project Management	
Education advice & development of educational plan, curriculum, staffing structure and policies	
Legal services	
Communications and marketing support (including uniform)	
Consultation services	
HR and recruitment services (incl. TUPE)	
Financial management and advice	
Appointment of key staff, including Principal Designate	
Financial and management information systems	
Other (e.g. ICT systems, project contingency allocation)	
Total:	
EIG funding:	

School budget information

Revenue carry forward at end-March [current year]	
Projected revenue balance at end-March [following year]:	£
If revenue deficit, give reasons and if more than 1% of total annual revenue budget, note remedial action:	
Capital carry forward at end-March [following year]	
Projected capital balance at end-March [following year]:	£
If capital deficit, give reasons and remedial action:	
Details of any agreed loans/financial leases:	

Use this box for any supplementary information:

2024 to 2026 finance plans

Revenue balances:	2023/24 budget	2024/25 budget	2025/26 budget
Total Allocation and Income			
Revenue Gross Expenditure			
Revenue Balance In Year			
Revenue Balance Brought Forward from previous year			
Revenue Balance Carried Forward to following year			

School pupil forecasts

	Capacity	Total Pupil Number	% Full
Current AY (2022/23)			
2023/24 Forecast			
2024/25 Forecast			
2025/26 Forecast			

Section 7 – Special or PRU provision

Delete if not required.

General information

School phase:	
Age range:	
School type:	
NOR (% full):	
Capacity:	
Categories of SEN catered for:	
No of places school is currently funded for:	
No of residential places:	
No of residential places the school is funded for:	
PFI:	
Viability issues:	
Deficit:	
Diocese % Good or Outstanding:	
Relevant distance:	
MP:	

School performance

Latest short inspection date	
Latest full inspection date	
Overall effectiveness	
Quality of education	
Behaviour and attitudes	
Personal development	
Effectiveness of leadership and management	
Additional information	

Additional information about pupil progress and outcomes

Use this box for the answer -

School performance data (updated KS1/Phonics/KS2/KS4/KS5 tables) - example of performance tables

KS1 Table

Attainment	2022 Nat avg. (%) - KS1 % expected standard in reading, writing and maths	2019 Nat avg. (%) - KS1 % expected standard in reading, writing and maths	2018 Nat avg. (%) - KS1 % expected standard in reading, writing and maths
Reading			
Writing			
Maths			

Phonics

	2022 Nat avg. (%) - % of pupils meeting the expected standard in the phonics screening check in year 1	2019 Nat avg. (%) - % of pupils meeting the expected standard in the phonics screening check in year 1	2018 Nat avg. (%) - % of pupils meeting the expected standard in the phonics screening check in year 1
Phonics			

KS2 tables

	% meeting expected std in RWM (PP) - 2022	% meeting expected std in RWM (PP) - 2019	% meeting expected std in RWM - 2018 (PP)	% achieving a higher std in RWM (PP) - 2022	% achieving a higher std in RWM (PP) - 2019	% achieving a higher std in RWM (PP) - 2018
[Name of school]						
National Average						

Progress Score

	Reading 2022	Writing 2022	Maths 2022	Reading 2019	Writing 2019	Maths 2019	Reading 2018	Writing 2018	Maths 2018
[Name of school]									
National Average									

KS4 tables

	5+ inc. Eng & Maths GCSE (5+ inc. Eng & Maths GCSE PP) 2022	APS Ebacc (Ebacc PP) 2022	Entering Ebacc % 2022	5+ inc. Eng & Maths GCSE (5+ inc. Eng & Maths GCSE PP) 2019	APS Ebacc (Ebacc PP) 2019	Entering Ebacc % 2019	5+ inc. Eng & Maths GCSE (5+ inc. Eng & Maths GCSE PP) 2018	APS Ebacc (Ebacc PP) 2018	Ebacc % entering 2018
[Name of school]									
National Average									

KS4 progress (%)

	English 2022	Maths 2022	English 2019	Maths 2019	English 2018	Maths 2018
[Name of school]						
National Average						

Attainment 8

	Year	A8 score	A8 - English	A8 - Maths	A8 - EBacc
[Name of school]					
National Average					

Progress 8

	Year (previous)	P8 score	P8 - lower CI	P8 - upper CI	P8 - English	P8 - Maths	P8 - EBacc
[Name of school]							
National Average							

KS5 info and data

Delete if not required.

Annex A – map