

Project template

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 of sponsor/MAT	

Academy type and route: Converter, Fast track, Intermediate, Full sponsored

Delete where necessary.

<p>Transfer from [Trust] – grant sought – [insert grant amount] *</p> <p>Conversion grant only – [amount] *</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. MDIF</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):	
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 judgement (date):	
Outcomes for pupils:	
Quality of teaching, learning and assessment:	
Effectiveness of leadership and management:	
Personal development, behaviour and welfare:	
Early years provision, 11 to 18 or 16 to 19?	
Overall effectiveness:	

Section 4 – Rationale

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

Risks and issues

PFI/Viability/Deficit?

Free schools: interdependencies with FS/Studio School/UTC projects and applications? [Yes/No]

if yes, please describe.

Equalities duty

Has an Equalities Impact Assessment been considered? Delete one of the following statements.

Either:

The equalities duty has been considered and the Secretary of State's decision is unlikely to affect disproportionately any particular person or group who share protected characteristics.

Or

The equalities duty has been considered and there are some impacts but on balance the analysis indicates these changes will not affect disproportionately any particular person or group who share protected characteristics.

Delete as appropriate

Section 5 – financial health

Standard Regions Group national financial health assessment

	Actuals - £000s Financial Statements	Actuals - £000s Financial Statements	Forecast Finances 2022	Forecast Finances 2022	Forecast Finances 2022
	2019/20	2020/21	2021/22	2022/23	2023/24
Total Revenue Income					
In-year surplus/deficit					
Carried forward surplus/deficit					
Carried forward as % of total income					

Is the trust in Education & Schools Funding Agency (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 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	
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Delivery Officer assessment

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Other views from ESFA on financial issues at the trust

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Section 6 – Project funding (for 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

School pupil forecasts

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

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			

Section 7 – Special provision [if required or delete]

Delete if not required.

General information

School phase:	
Age range:	
School type:	
Number On Roll (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:	
Private Finance Initiative (PFI):	
Viability issues:	
Deficit:	
Diocese % Good or Outstanding:	
Relevant distance:	
MP:	

School performance

Ofsted judgement (date):	
Outcomes for pupils:	
Quality of teaching, learning and assessment:	
Effectiveness of leadership and management:	
Personal development, behaviour and welfare:	
Early years provision, 11 to 18 or 16 to 19:	
Overall effectiveness:	

Additional information about pupil progress and outcomes

Use this box for the answer -

Section 8 – Pupil Referral Unit (PRU) provisions [if required or delete]

Delete if not required.

General information

School phase:	
Age range:	
School type:	Pupil Referral Unit
Number of agreed places:	
Cohort: (e.g. permanently excluded, hospital provision, teenage mums unit etc)	
No of AP places:	
No of SEN Unit places:	
No of medical places:	
No of post-16 places:	
PFI:	
Viability issues:	
Deficit:	
Diocese % Good or Outstanding:	
Relevant distance:	
MP:	

PRU performance

Ofsted judgement (date):	
Outcomes for pupils:	
Quality of teaching, learning and assessment:	
Effectiveness of leadership and management:	
Personal development, behaviour and welfare:	
Early years provision, 11 to 18 or 16 to 19:	
Overall effectiveness:	

School performance data (updated (Key Stage) KS2/KS4/KS5 tables) - example of performance tables

For consideration of 21/22 performance data, please refer to the [2022 RD decision-making](#) advice.

KS2 tables

Delete if not required.

	% meeting expected std in *RWM (**PP)	% meeting expected std in RWM (PP)	% achieving a higher std in RWM (PP)	% achieving a higher std in RWM (PP)	% KS2 ***L4+ (L4+ PP)	% KS2 L5+ (L5+ PP)
	2022	2019	2022	2019	2022	2019
[Name of school]						
National Average						

*RWM = Reading Writing & Maths, **PP = Pass, ***L = Level

Progress Score

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

KS4 tables

Delete if not required.

	5+ A*-C inc. Eng & Maths GCSE (5+ A*-C inc. Eng & Maths GCSE PP) 2022	EBacc (EBacc PP) 2022	Entering EBacc % 2022	5+ A*-C inc. Eng & Maths GCSE (5+ A*-C inc. Eng & Maths GCSE PP) 2019	EBacc (EBacc PP) 2019	Entering EBacc % 2019	5+ A*-C inc. Eng & Maths GCSE (5+ A*-C inc. Eng & Maths GCSE PP) 2018	EBacc (EBacc PP) 2018	Entering EBacc % 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						

KS4 2022, 2019, and 2018 (DN: re COVID and the national lockdown, data for 19/20 and 20/21 is not being used)

Attainment 8

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

Progress 8

	Year	Pupils included in P8	P8 score	P8 - lower CI	P8 - upper CI	P8 - English	P8 - Maths	P8 - EBacc
[Name of school]								
National Average								

*CI = Confidence Interval

KS5 info and data

if required or delete

Annex A – map

[Please insert]