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**ACADEMY CONVERSIONS & THE  
FIRST 12 MONTHS: WHAT I WISH  
I'D KNOWN FIRST!**

**#SBM15**

# Conversion from a maintained Primary & a year down the road

Not a bible according to.... Just a  
personal insight on how I felt  
having been in post for quite a few  
years as a maintained school, SBM

## Practical preparation before converting in Black text from Jayne

### Neal's inset last year & **Comments in Red after the event**

- Think about your conversion date – September is ideal, but summer deadlines are not! *April was a good date for Our school others in the DA converted in January*
- Choose your advisors wisely – *especially solicitors accountants their support and expertise can make a huge difference as a group we picked companies who had academy experience*
- Bring everything you possibly can up to date before conversion *Pretty straight forward, from a finance point of view.*
- Don't neglect Premises, H&S *especially if you are stand alone academy the responsibility and accountability for these areas ranks up a few notches make sure you are buying into a trusted service YOU NEED IT.*
- Get your own office!! *More important make sure you have the correct level of personnel in the main school office; layered structure to fit with segregation of duties*

# Saving Grace

- If you can go through this with other colleagues it helps. The other School Business Managers in the Discovery Alliance were my saving grace



# Useful points important for change

## Don't make too many changes in the first year

- Maximise, the opportunity to make savings – everything is negotiable! **My thoughts are** *you don't have the time to do this in the first 6 months as you are busy trying to keep your feet above water , I would recommend start looking a year down the road when your renewal of your SLA's come in.*
- Challenge every quote, and beware the ones you don't really need. *Everyone wants to sell to you now you are an academy and I mean **everyone!!***
- Think like a business. *The difference with the LA is dramatic not as I expected it to be!*
- Embrace change - it's unavoidable *Always have but when it comes all at once the overload is tremendous*
- Start as you mean to go on – get your house in order from the off. *Wonderful advice but due to all the changes that were going on with change in personnel, process and most procedures you find yourself running behind and quite stressed about things*

## Some tips to support you with success

- Know your numbers *Pupil numbers on census matter get it right first time check the information from the EFA they are not always right.*
- Get the money in – don't assume it all comes when it should! *Use your Planner from the EFA to check the remittances off*
- Smooth your spending – monthly billing *this is good planning and makes your life so much better*
- Take advantage of training and networking *I use the support from the accountants for the new processes, also the HT and I have accessed Employment Law training through the legal company*
- Don't waste time reinventing the wheel - just ask!- *ask & ask*
- Keep your finance system up to date for efficient month end processing – *Great advice but I couldn't keep it up to date for quite some time just not enough time*

# Lessons Learned

- Accounts coding structure – *set up a structure that fits with your schools individual needs*
- Conversion is the perfect moment to change things for the better – short term pain for long term gain- *take a look at the schools administration process and procedures how could you do things better – what have you wanted to change for a while – Look at what your Site Manager /Caretaker does*
- Ensure contracts and agreements include exit clauses *check these with your legal team- check all you SLA's with the SLT to ensure everything will still apply as an academy.*
- Be realistic about timeframes and in house abilities- *back to the personnel situation again – Check the timings of the governors meetings as all polices need to be re-written*

# What I didn't expect

- The time it takes to settle into the new ways of work
- On a personal level I thought it would be just another new thing.....like changing finance system.
- But in reality everything has changed from a Business Managers role , not from a pupil or teachers perspective.
- The time it takes to go through all the school policies and new processes
- A NOW for a positive!!!!



Things are settling down now we are **15**  
months into the new academy and I am  
back smiling again

