

**DATED** \_\_\_\_\_ **2016**

**(1) THE BOROUGH COUNCIL OF BOLTON**

**(2) THE GOVERNING BODY OF ST JAMES C OF E PRIMARY SCHOOL**

**(3) BOLTON AND FARNWORTH MULTI ACADEMY TRUST**

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**TRANSFER AGREEMENT**  
**Re: St James C of E Primary School**

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**BETWEEN:**

- (1) **THE BOROUGH COUNCIL OF BOLTON** of Town Hall, Victoria Square, Bolton BL1 1RU (the "**Council**");
- (2) **THE GOVERNING BODY OF ST JAMES C OF E PRIMARY SCHOOL** of St James C of E Primary School, Hillside, Farnworth, Bolton BL4 9QB (the "**Governing Body**");
- (3) **BOLTON AND FARNWORTH CHURCH OF ENGLAND PRIMARY MULTI ACADEMY TRUST** a company limited by guarantee registered in England and Wales (company number: TBC) whose registered office is at Rupert Street, Bolton, Lancs, BL3 6PY

(the "**Company**").

**WHEREAS**

- (A) The School will close and the Company will, from the Transfer Date, operate the Academy on the same site as the School.

**1. DEFINITIONS AND INTERPRETATION**

1.1 In this Agreement the following words shall have the following meanings:-

- |                     |   |
|---------------------|---|
| <b>"Academy"</b>    | means the academy to be run by the Company on the site of the School under the proposed name of St James C of E Primary School;   |
| <b>"Assets"</b>     | means all property, undertaking, rights and assets, whether tangible or intangible, of whatever nature used or held by the Council and/or the Governing Body (as the case may be) for the purposes of the School including those listed in Schedule 3, but excluding the Excluded Assets;   |
| <b>"Contractor"</b> | means a contractor providing services to the Company to whom the contract of employment of any Transferring Employee is transferred pursuant to the Regulations on or after the Transfer Date;  |
| <b>"Contracts"</b>  | means the contracts (including any collateral warranties, guarantees, bonds and third party rights in favour of the Council and/or the Governing Body (irrespective of whether the Council or the Governing Body is a signatory to the same)) entered into by the Council and/or the Governing Body (as the case may be) for the purpose of operating the School in the ordinary course of business which are still in force at the Transfer Date, including:- <ol style="list-style-type: none"><li>i) contracts, collateral warranties, guarantees, bonds and third party rights relating to building, improvement, maintenance or other works of the land and buildings comprised in the site of the School;</li><li>ii) any collateral warranties, guarantees, bonds and third party rights in favour of the Council and/or</li></ol> |

the Governing Body (irrespective of whether the Council or the Governing Body is a signatory to the same); and

(iii) those contracts listed in Schedule 2

**"Data Protection Legislation"**

means the Data Protection Act 1998 ("DPA"), and all applicable laws and regulations relating to processing of personal data and privacy, including where applicable, the guidance and codes of practice issued by the Information Commissioner;

**"Directive"**

means the Safeguarding of Employees Directive (2001/23/EC) (as amended, re-enacted or extended from time to time)

**"Eligible Employees"**

means the Transferring Employees who are active members of or eligible to join either the LGPS or the TPS immediately before the Transfer Date;

**"Employee Liability Information"**

means the information which a transferor is obliged to notify to a transferee pursuant to Regulation 11(2) of the Regulations

**"Employee Schedule"**

means a list of all School Employees as at the date that the list is provided to the Company;

**"Encumbrance"**

means any mortgage, charge, pledge, lien, equity, option, restriction, right of refusal, right of pre-emption, third party right or interest, any other encumbrance or security interest of any kind, and any other type of preferential arrangement (including title transfer and retention arrangements) having a similar effect;

**"Excluded Assets"**

means the assets described in Schedule 4 which are excluded from the transfer effected by this Agreement;

**"Final Employee Schedule"**

means a list of all School Employees as at the Transfer Date;

**"Funding Agreement"**

means a funding agreement to be entered into between the Secretary of State for Education and the Company with regard to funding arrangements for the Academy;

**"Loss"**

means all costs, claims, liabilities and expenses (including reasonable legal expenses);

**"the LGPS"**

means a Local Government Pension Scheme established pursuant to regulations made by the Secretary of State in exercise of powers under Sections 7 and 12 of the Superannuation Act 1972 as from time to time amended;

**"the Personnel Files"**

means in respect of the Transferring Employees copies of all personnel files or records relating to their employment at the School and any previous period of continuous employment with the Council and/or the Governing Body, including without limitation a copy of any contractual documentation, any documentation relating to job description, pay information, training records, information relating to sickness absence, a

	copy of any disciplinary warnings and a copy of any grievances;
<b>“the Pupil Records”</b>	means all records and information in respect of the pupils at the School who will or who are likely to become pupils at the Academy or who have previously been pupils at the School;
<b>“the Regulations”</b>	means The Transfer of Undertakings (Protection of Employment) Regulations 2006 (as amended or re-enacted from time to time);
<b>“the School”</b>	means St James Church of England Primary School;
<b>“School Employees”</b>	means any employees of the Council or of the Governing Body or of any other persons who are assigned to the School or to services provided in connection with the School;
<b>“Staffing Information”</b>	means, in respect of the School Employees, the information listed in Schedule 1;
<b>“the TPS”</b>	means the Teachers’ Pension Scheme established pursuant to regulations made by the Secretary of State in exercise of powers under sections 9 and 12 of and Schedule 3 to the Superannuation Act 1972 as from time to time amended;
<b>“Transfer Date”</b>	means the date specified in the Funding Agreement on which the Academy will open;
<b>“Transferring Employees”</b>	means any School Employees whose employment transfers to the Company or to a Contractor on the Transfer Date pursuant to the Regulations and who are listed in the Employee Schedule;

- 1.2 In this Agreement (except where the context otherwise requires):
- 1.2.1 use of the singular includes the plural (and *vice versa*) and use of any gender includes the other genders;
  - 1.2.2 a reference to a party is to a party to this Agreement and shall include that party's personal representatives, successors or permitted assignees;
  - 1.2.3 a reference to persons includes natural persons, firms, partnerships, bodies corporate and corporations, and associations, organisations, governments, states, foundations, trusts and other unincorporated bodies (in each case whether or not having separate legal personality and irrespective of their jurisdiction of origin, incorporation or residence); and
  - 1.2.4 a reference to a Clause or Schedule is to the relevant clause of or schedule to this Agreement; a reference to a sub-clause or paragraph is to the relevant sub-clause or paragraph of the Clause or Schedule in which it appears.
- 1.3 The Schedules form an integral part of this Agreement and have effect as if set out in full in the body of this Agreement. A reference to this Agreement includes the Schedules.
- 1.4 In the event of any conflict or inconsistency between the Clauses and the Schedules of this Agreement, the Clauses shall prevail.

1.5 General words are not to be given a restrictive meaning because they are followed by particular examples, and any words introduced by the terms "including", "include", "in particular" or any similar expression will be construed as illustrative and the words following any of those terms will not limit the sense of the words preceding those terms.

1.6 Any reference to a statute, statutory provision or statutory instrument includes a reference to that statute, statutory provision or statutory instrument together with all rules and regulations made under it as from time to time amended, consolidated or re-enacted .

## 2. **CONDITION PRECEDENT**

2.1 This Agreement is conditional upon the Funding Agreement being signed by the Company and the Secretary of State on or before 1 July 2016. In the event that the Funding Agreement is not signed by such date, this Agreement shall cease to have effect on 30 June 2016.

## 3. **OPERATION OF THE REGULATIONS**

The Parties intend and acknowledge that the closing of the School and the opening of the Academy shall constitute a transfer to which the Directive and the Regulations apply and agree that as a consequence that the contracts of employment made between the current employer and the Transferring Employees (save insofar as such contracts relate to benefits for old age, invalidity or survivors under any occupational pension scheme) shall have effect from and after the Transfer Date as if originally made between the Company or (as the case may be) a Contractor and the Transferring Employees.

## 4. **PROVISION OF STAFFING INFORMATION AND WARRANTIES**

4.1 Without prejudice to its obligation pursuant to the Regulations to provide the Employee Liability Information, the Council shall on or before 15 March 2016 to the extent lawfully permitted provide the Company with the Employee Schedule and Staffing Information.

4.2 The Council shall notify the Company of any material change to the Employee Schedule and the Staffing Information as soon as is reasonably practicable, and shall upon request by the Company meet the Company to discuss the information disclosed.

4.3 The Council warrants that the information in the Employee Schedule and the Staffing Information shall be complete and accurate and kept up-to-date.

4.4 The Council undertakes to the Company that during the period from the date of this Agreement up to and including the Transfer Date:

4.4.1 the Council and the Governing Body shall enable and assist the Company and such other persons as the Company may determine to communicate with and meet the School Employees and their trade union or other employee representatives;

4.4.2 the Council and the Governing Body, shall not, and shall procure that any other employer of the School Employees shall not, without the prior written consent of the Company:

(a) amend or vary (or purport or promise to amend or vary) the terms and conditions of employment or engagement (including, for the avoidance of doubt, pay and job description) of any School

Employees (other than where such amendment or variation has previously been agreed between the Council and the School Employees in the normal course of business, and where any such amendment or variation is not in any way related to the transfer to the Company);

(b) terminate or give notice to terminate the employment or engagement of any School Employees (other than in circumstances in which the termination is for reasons of misconduct or lack of capability);

(c) employ or assign any person to the School who would or might as a consequence of such employment or assignment become a Transferring Employee;

## 5. APPORTIONMENTS

5.1 The Council shall be responsible for all emoluments and outgoings in respect of the School Employees (including all wages, bonuses, commission, premiums, subscriptions, PAYE and national insurance contributions and pension contributions) which are attributable in whole or in part to the period up to and including the Transfer Date.

5.2 The Company shall be responsible for all emoluments and outgoings in respect of the Transferring Employees (including all wages, bonuses, commission, premiums, subscriptions, PAYE and national insurance contributions and pension contributions) which are attributable in whole or in part to the period after the Transfer Date.

## 6. INFORMATION AND CONSULTATION

6.1 The Company shall comply (and shall procure that any Contractor complies) with its obligations under Regulation 13 of the Regulations during the period prior to the Transfer Date.

6.2 The Council shall comply with its obligations under Regulations 13 and 14 of the Regulations during the period prior to the Transfer Date, save where the Council is unable to do so as a result of the failure of the Company and/or any Contractor to comply with their duties under Regulation 13 of the Regulations.

## 7. NOT USED

## 8. PENSIONS

8.1 The parties acknowledge that the Company is a “scheme employer” for the purposes of the Local Government Pension Scheme (Administration) Regulations 2008 (“the LGPS Regulations” which expression shall include any regulations amending or replacing the regulations from time to time) and that the LGPS Regulations shall apply to the Company (as the person carrying on the business of the Academy).

8.2 The parties acknowledge that the Company will from the Transfer Date be an “employer” for the purposes of the Teachers’ Pension Scheme Regulations 1997 SI 1997/3001 (“the TPS Regulations” which expression shall include any regulations amending or replacing the regulations from time to time) and that the TPS Regulations shall apply to the Company (as the person carrying on the business of the Academy) from the Transfer Date.

- 8.3 The Company acknowledges that the Eligible Employees shall be, or as the case may be, remain eligible for membership of the LGPS or the TPS (as the case may be) while employed at the Academy following the Transfer Date subject to the terms of the LGPS Regulations and the TPS Regulations.
- 8.4 The Company shall be responsible for any LGPS deficit relating to the Eligible Employees' membership of the LGPS referable to service up to and including the Transfer Date.
- 8.5 The Company shall from the Transfer Date be responsible for all employer contributions payable to the LGPS and the TPS in respect of the Eligible Employees and any other sum due to the LGPS and the TPS in respect of the Eligible Employees.
- 8.6 The Company shall:
- 8.6.1 maintain such documents and information as will be reasonably required to manage the pension aspects of any onward transfer of any of the Eligible Employees;
  - 8.6.2 promptly provide to the Council such documents and information which the Council may reasonably request in advance of any onward transfer of any person engaged or employed by the Company; and
  - 8.6.3 fully co-operate with the reasonable requests of the Council relating to any administrative tasks necessary to deal with the pension aspects of any onward transfer of any person engaged or employed by the Company.

## 9. **THE ASSETS AND THE CONTRACTS**

- 9.1 On the Transfer Date the Council and/or the Governing Body (as applicable) will transfer (or to the extent that it is not the owner thereof shall procure the transfer of) the legal and beneficial interest in the Assets, free of charge and free from any Encumbrance, to the Company, save for any Encumbrance which has been fully and accurately disclosed to the Company prior to the Transfer Date.
- 9.2 The Council and/or Governing Body (as applicable) with effect from the Transfer Date assigns (to the extent that they are a party to the Contracts and are able to assign) to the Company all the Contracts which are capable of assignment without the consent of other parties to those contracts.
- 9.3 If any of the Contracts cannot be transferred to the Company except by an assignment made with the consent of another party or by an agreement of novation:
- 9.3.1 this Agreement shall not constitute an assignment or an attempted assignment of the Contract if the assignment or attempted assignment would constitute a breach of the Contract;
  - 9.3.2 after the Transfer Date the parties shall use their respective reasonable endeavours to obtain the consent of the other party to the assignment, or to procure the novation, of the Contract; and
  - 9.3.3 until the consent or novation is obtained:
    - (a) the Council or the Governing Body (as the case may be) shall hold the same on trust for the Company and shall (at its cost) do all such acts and things as the Company may reasonably require to enable due performance of the Contract and to provide for the Company the benefits of the Contract (including enforcement of any right of the Council or the Governing Body (as the case may

- be) against the other party to the Contract arising out of its termination by the other party or otherwise);
- (b) the Company shall (if sub-contracting is permissible and lawful under the Contract in question), as the Council's or Governing Body's (as appropriate) sub-contractor, perform all the obligations of the Council (or Governing Body) under such Contract and where sub-contracting is not permissible, the Company shall perform such obligations as agent for the Council or Governing Body (as appropriate); and
- (c) unless and until any such Contract is assigned or novated, the Council or Governing Body (as appropriate) shall (so far as it lawfully may) at the Company's cost give all such assistance as the Company may reasonably require to enable the Company to enforce its rights under such Contract, including, providing access to all relevant books, documents and other information in relation to such Contract as the Company may reasonably require from time to time.
- 9.4 Pending the Transfer Date, possession of the Assets shall be retained by the Council and/or the Governing Body (as the case may be).
- 9.5 All receipts relating to the Assets and all Loss and outgoings incurred or payable in relation to the Assets up to the Transfer Date ("**Historic Liabilities**") shall belong to, and be paid and discharged by, the Council or, as the case may be, the Governing Body. For the avoidance of doubt all Historic Liabilities in relation to the Contracts shall belong to, and be paid and discharged by the Company.
- 9.6 All receipts relating to the Assets and the Contracts and all Losses and outgoings incurred or payable as from and including the Transfer Date ("**Future Liabilities**") shall belong to, and be paid and discharged by the Company.
- 9.7 The Company agrees that, following the Transfer Date, it shall provide the Council with sufficient information, as reasonably requested by the Council, to enable the Council to accurately determine and discharge any Historic Liabilities (including, without limitation, any payments relating to the School's accounts). In the event that the Council makes an underpayment or overpayment in relation to any Historic Liabilities (including, without limitation, any payments relating to the School's accounts), the Council and the Company agree to repay any such sums to the other (as appropriate). In the event that the Council has made no payment in relation to any Historic Liabilities but has received payment from the Secretary of State in respect of these, and this amount is an underpayment or an overpayment, the Council and the Company agree to repay any such sums to the other (as appropriate).
- 9.8 The Council and the Governing Body shall on or before the Transfer Date deliver to the Company the Personnel Files and the Pupil Records, to the extent that they are permitted to do so by Data Protection Legislation (and both the Council and the Governing Body shall use reasonable endeavours to ensure that they are permitted by Data Protection Legislation to deliver such information to the Company).
- 9.9 The Company undertakes not to use the Personnel Files or the Pupil Records for any purposes unconnected with the operation and management of the Academy, the purposes for which such information was originally collected or any other lawful purposes.
- 9.10 In the event that the Council has procured professional services in connection with building or maintenance works by utilising in-house resources instead of appointing external consultants, in respect of those services the Council warrants that it has



exercised (and if relevant will continue to do so) the degree of reasonable skill and care to be expected of an appropriately qualified professional of the relevant discipline to the services in question who is experienced in performing such services.

9.11 In any case where the Contracts relate to building works which have not reached practical completion or are still within the rectification period, defects liability period or maintenance period or where there are professional services still to perform the Contracts shall not be assigned and the Council shall hold the benefits of such Contracts on trust for the Company until the issue of the certificate of making good defects or equivalent of the building works or completion of professional services and the following clauses shall apply:

9.11.1 the Council shall continue to perform the employer's obligations under such Contracts;

9.11.2 the Council shall procure that the contract administrator shall provide 5 business days prior written notice to the Company of the contract administrator's intention to issue any certificate of practical completion and making good defects and the Council shall procure that the contract administrator shall take all due and proper regard of the representations made by the Company in relation to such certificate provided that such representations are provided within 5 business days of such notice;

9.11.3 the Council shall at the request and expense of the Company take such action under the Contracts as may reasonably be required by the Company and will pay to the Company all monies and sums received pursuant to such enforcement action as soon as reasonably practicable; and

9.11.4 upon the issue of the certificate of making good defects or equivalent of the building works or completion of professional services, the Council shall assign such Contracts to the Company and clause 9.3 shall apply.

10. **NOT USED**

11. **CONFIDENTIALITY**

Each party undertakes to the other that they will keep the contents of this Agreement confidential as between the parties, except to the extent that disclosure is required by law.

12. **THIRD PARTIES**

No person who is not a party to this Agreement is intended to reserve a benefit under, or be entitled to enforce, this Agreement pursuant to the Contracts (Rights of Third Parties) Act 1999 (the "**Act**") save that any Contractor may enjoy the benefit and enforce the terms of this Agreement in accordance with the Act. Notwithstanding this, neither the Council nor the Governing Body nor the Company require the consent of any Contractor to rescind or vary this Agreement at any time, even if that variation or rescission affects the benefits conferred on such Contractor.

13. **FORCE MAJEURE**

Neither party will be liable to the other for any delay or non-performance of its obligations under this Agreement arising from any cause or causes beyond its reasonable control.

14. **GENERAL**

14.1 No forbearance or delay by either party in enforcing its rights will prejudice or restrict the rights of that party, and no waiver of any such rights or of any breach of any contractual terms will be deemed to be a waiver of any other right or of any later breach.

14.2 No variation of this Agreement will be valid unless recorded in writing and signed by or on behalf of each of the parties to this Agreement.

14.3 If any provision of this Agreement (or part of any provision) is found by any court or other authority of competent jurisdiction or illegal, the other provisions will remain unaffected and in force.

14.4 Nothing in this Agreement will be construed as constituting or evidencing any partnership, contract of employment or joint venture of any kind between either of the parties or as authorising either party to act as agent for the other. Neither party will have authority to make representations for, act in the name or on behalf of or otherwise to bind the other party in any way.

14.5 Neither party will make any announcement relating to this Agreement or its subject matter without the prior written approval of the other party (such approval not to be unreasonably withheld or delayed).

14.6 Nothing in this Agreement shall oblige the Governing Body to continue in existence where it ceases to do so as a result of the closure of the School or by operation of law or shall place any obligation or liability on the individual members of the Governing Body whether or not the Governing Body continues to exist.

14.7 Each party will, at the request of the other party and its own cost, do (or procure others to do) everything necessary to give the other party the full benefit of this Agreement.

14.8 Any notice required to be given under this Agreement shall be in writing and shall be delivered personally, or sent by pre-paid first class or recorded delivery or by commercial courier, to each party required to receive the notice at the addresses specified by the relevant party by written notice to the other (and if no such address is specified), the address set out at the front of this Agreement.

14.9 Any notice shall be deemed to have been duly received:

14.9.1 if delivered personally, when left at the address and for the contract referred to in this Clause; or

14.9.2 if sent by pre-paid first class post or recorded delivery, at 9.00 a.m. on the second business day after posting; or

14.9.3 if delivered by commercial courier, on the date and at the time that the courier's delivery receipt is signed.

14.10 A notice required to be given under this Agreement shall not be validly given if sent by email.

- 14.11 This Agreement may be executed in any number of counterparts, each of which will be an original and all of which will together constitute a single agreement.
- 14.12 Each party shall bear its own costs and expenses (including legal fees) in relation to the preparation and execution of this Agreement.
- 14.13 This Agreement constitutes the entire agreement and understanding between the parties in respect of the matters dealt with in and supersedes any previous agreement between the parties.
- 14.14 Each of the parties acknowledge and agrees that in entering into this Agreement it does not rely on, and will have no remedy in respect of, any statement, representation, warranty or understanding (whether negligently or innocently made) of any person (whether party to this Agreement or not) other than as expressly set out in this Agreement.

15. **GOVERNING LAW AND JURISDICTION**

- 15.1 This Agreement will be governed by and interpreted in accordance with the law of England.
- 15.2 Each party irrevocably submits to the exclusive jurisdiction of the courts of England over any claim or matter arising under or in connection with this Agreement.

.....

**SIGNED** by \_\_\_\_\_ )

**Authorised Signatory on behalf of THE  
BOROUGH COUNCIL OF BOLTON**

**SIGNED** by \_\_\_\_\_ ) .....

Duly authorised on behalf of the )

**GOVERNING BODY**

**SIGNED** by \_\_\_\_\_ ) .....

Duly authorised on behalf of

**COMPANY**

## SCHEDULE 1

### STAFFING INFORMATION

1. **Individual terms and conditions**
- 1.1 Copies of all current employment contracts, and all other terms and conditions of employment.
- 1.2 A schedule comprising in respect of each employee, the following particulars:-
  - (a) full name;
  - (b) post;
  - (c) whether the employment is full or part time;
  - (d) sex;
  - (e) date of birth;
  - (f) date of commencement of service;
  - (g) notice period;
  - (h) normal retirement age;
  - (i) remuneration;
  - (j) pension;
  - (k) in respect of teachers:
    - (i) scale point or leadership group spine point;
    - (ii) assimilation point for the head teacher;
    - (iii) whether the employee is a post-threshold teacher;
    - (iv) whether the employee is a good honours graduate;
    - (v) management, recruitment, retention and/or any other allowances payable;
    - (vi) any applicable assimilation safeguarding,and all other benefits whether contractual or otherwise.
- 1.3 Details of any recent changes of terms and conditions in relation to any employee.
- 1.4 Copies of any employee handbooks, rules and other policies, procedures, arrangements or agreements in relation to:-
  - (a) redundancy procedures and payments;
  - (b) redeployment procedures;
  - (c) sickness absence and sick pay entitlements;

- (d) equal opportunities;
- (e) disciplinary matters;
- (f) maternity rights;

and details of whether or not each of the above are discretionary or contractual.

1.5 Copies of any job descriptions.

1.6 Details of any practices or customs which although not written down form part of employees' terms and conditions of employment.

## 2. **Collective bargaining**

2.1 Details of the names of all trade union and other employee representatives, with the name of the trade union, the position held and how long the position was held.

2.2 Details of any trade union recognised by the Council / Governing Body, giving the date and details of the recognition agreement (and a copy if available), with brief details of current and historic labour relations and any pending negotiations.

2.3 Details of any other agreement, whether school, local or national, with any trade union or other body of employee representatives (and copies if available) including any informal recognition and procedure arrangements and other arrangements honoured by "custom and practice".

2.4 Details of which, if any, of the terms of any collective agreement form part of individuals' terms and conditions of employment.

## 3. **Disputes**

3.1 Details of any dispute with any employee whether brought under the Council / Governing Body's disciplinary or grievance procedure or otherwise and any matters which might give rise to such.

3.2 Details of any litigation threatened or pending against the Council / Governing Body, including any court, employment tribunal or arbitration claims or any matters which might give rise to such.

3.3 Details of any enquiry, correspondence or contact between the Council / Governing Body and the Commission for Racial Equality, the Equal Opportunities Commission, the Health and Safety Inspector and the Inland Revenue concerning employees.

3.4 Details of any court judgment or current employment tribunal award in respect of any employee dispute.

3.5 Details, and, if available, copies, of any warnings given to employees under the Council / Governing Body's disciplinary or capability procedures.

## 4. **Dismissals**

4.1 Details of all dismissals/resignations within the last 12 months including reasons for the dismissal/resignation.

4.2 Details of all employees recruited within the last 12 months.

5. **Working Time Regulations 1998**
  - 5.1 Copies of any individual, collective and workforce agreements entered into pursuant to the Working Time Regulations.
6. **Health and Safety**
  - 6.1 Details of any health and safety committees/representatives.
  - 6.2 Details of any health and safety complaints or recommendations or claims within the last 5 years.
7. **Trainees/Consultants**
  - 7.1 Details of all individuals in the undertaking working on training, work experience or similar schemes.
  - 7.2 Details of all consultancy agreements or self-employed personnel who are or may actually be employees.
8. **Absent employees**
  - 8.1 Details of all employees who have notified the Council / Governing Body that they are pregnant or who are currently absent on maternity leave.
  - 8.2 Details of all employees on long term sick leave together with confirmation of the nature of their illness and the duration and dates of their absence(s) due to that condition.
9. **Job Evaluation Scheme**
  - 9.1 A copy of any job evaluation scheme.
10. **Contractor Employees**
  - 10.1 Details of any individuals employed by contractors working in the school.
11. **Pension**
  - 11.1 A list of all pension schemes (both occupational and personal) applicable to the employees.
  - 11.2 Details of any current or pending applications for early retirement.

**SCHEDULE 2**  
**THE CONTRACTS**



**SCHEDULE 3**  
**THE ASSETS**

1. All equipment, furniture, fixtures and fittings on the site of the School ("**the loose plant and equipment**"), subject to all contractual obligations in respect of any part of the loose plant and equipment which is the subject of any leasing, hire or hire purchase agreements listed in Schedule 2 except, for the avoidance of doubt, the Excluded Assets.
2. All rights to use the name of the School and all logos and domain names used exclusively by the School. All copyrights, database rights and other intellectual property rights owned by the Council or Governing Body (as appropriate) and used exclusively by the School.
3. All rights of the Council or Governing Body (as appropriate) in respect of computer software used by the School whether granted by licence or otherwise.
4. Any balance remaining from the School's budget following completion of due accounting procedures.
5. The benefit of any insurance proceeds in respect of claims made by the Governing Body and/or third parties (where appropriate) prior to the Transfer Date and agreed to be paid by the relevant insurer subject to the Company paying the policy excess in relation to any claim howsoever arising.

**SCHEDULE 4**  
**THE EXCLUDED ASSETS**

The following assets are excluded from this transfer:

1. The freehold titles to the site of the School.
2. Cash in hand or at bank (other than any surpluses transferred to the Company from the Council and the Governing Body pursuant to the Academy Conversions (Transfer of School Surpluses) Regulation 2010, the Working Capital Requirements or any amounts referred to at paragraph 4 of Schedule 3.
3. The assets or equipment belonging to any, club, society or other department of the Council which are stored at the School and are not required for the operation of the School.