



MAT Contribution Policy

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| Approved: | December 2020 |
| Applicable to: | All Trust Schools |
| Review Date: | April 2021 |

The Academy's Financial Handbook, states a trust with multiple academies can either amalgamate GAG for its academies to form one central fund or collect a proportion of general annual grant (GAG) funding from all its academies to form one central fund. It can use this fund to meet the costs of running any of the constituent academies within the trust and to pay for central and back office services.

The Academies Financial Handbook does not outline a limit on how much can be collected, but the MAT must:

- Give individual consideration to the funding needs and allocations of each constituent academy.
- Have an appeals mechanism in place.

Multi Academy Trust Central Services Contribution

The Board of Trustees agree the % of income revenue to be contributed to the management and running costs of central services. The current contribution for the financial year 2020/2021, is 4% for schools with an annual revenue budget of up to £2,000,000 and 5% for schools with an annual budget of over £2,000,000. Schools would be consulted on any proposed increase, and would have the opportunity to build it into their budget.

Academy Reserves

The Trustees plan for, manage and maintain an adequate level of financial reserves to meet the needs and identified risks of the organisation. Each academy is requested to work towards a 4% reserve to be held centrally during the period 2020-2021. Further detail on this can be found in the reserves policy.

A statement for the MAT contribution will be issued to individual academies no later than 31st of August for the next academic year detailing the fund to be collected by the Trust. Academies will have a period of 10 working days to appeal to the Board of Trustees.

The contribution will be used to fund the following expenditure on behalf of academies with the Trust, further details are held within the Central Services Brochure. The list includes but is not limited to:

Central services staff remuneration

Governance

- Scheme of Delegation, Terms of Reference and Standing Orders
- Policies
- Governance Plan
- Governors Handbook
- Clerks Handbook
- Termly newsletters
- Training
- Membership of The Key for School Governors
- Membership of the National Governance Association (NGA)
- NGA Learning Link - training modules for Chairs, Governors and Clerks
- Partnership Working and Support
- LGB Chairs Meetings
- Clerks Network
- Attendance at LGBs by Executive
- Exclusion and Admissions Panels
- Skills Audit Support
- Companies House Administration

School Improvement

Areas include but are not limited to:

- Quality of Education
- Clarity of vision & strategy including effectiveness of resource management
- Impact of curriculum leadership, teaching & assessment (English, Maths and Wider Curriculum)
- Building of cultural capital
- Outcomes for pupils
- Extent to which the needs of vulnerable learners are met
- Behaviour and Attitudes
- Attendance & punctuality
- Extent to which pupils feel safe in school
- Personal Development
- Promotion of fundamental British values
- Provision for and impact of SMSC development
- Impact of relationships and health education
- Range, quality & take-up of extra-curricular activities
- Leadership and Management
- Extent to which staff CDP is aligned with the curriculum
- Engagement of parents / community in ways that supports pupils' education
- Management of workload while developing & strengthening the quality of the workforce
- Impact of governance

- Effectiveness of safeguarding

School Improvement visits can involve any of the following as required:

- Leadership Development
- Action plans (writing, monitoring, accountability)
- Curriculum planning and progression
- Policy updates
- Joint lesson observations / learning walks
- Data analysis (ASP, internal tracking, Trust summaries, QLA etc.)
- Planning scrutinies
- Book scrutinies
- Pupil progress meetings
- Exploration of 'Deep Dive' questions
- Coaching and mentoring
- Lesson observations / learning walks and feedback
- Demonstration lessons
- Team teaching
- Lead professional development meetings
- Assessment
- Modelling of assessment for learning
- Moderation of judgements
- Analysis of data

Additional School Improvement Opportunities

- Trust Clusters
- Moderation
- Data Analysis

EYFS baseline data is also reported to the Trust at the end of term 1. Following submission, Trust-wide analysis is provided for schools by the Director of School Improvement to enable comparisons and benchmarking. As we move forward, this central analysis will be provided by FFT Aspire.

Teaching School

- School To School Support
- Initial Teacher Training
- Continuing professional and leadership development
- School to School Support
- Initial Teacher Training
- Continuing professional and leadership development

Human Resources (HR)

- Recruitment and pre-employment requirements
- Offer support and guidance with any HR query, signposting to the relevant legislation and recommendations.
- Policy review
- Capability issue support

- Disciplinary issue support
- Maternity and Paternity advice
- HR Risk Assessments
- Occupational Health referrals
- Liaison with union representatives

Payroll

- Administration of payroll in conjunction with Wiltshire Payroll Service.
- Managing and checking third party payments
- Liasing with HMRC on behalf of the employer
- Managing the Apprenticeship Levy payment and administration on behalf of the employer
- Administer any Local Government Pension administration
- Administer Teachers Pension administration
- Manage Teachers' Pension statutory returns
- Manage Local Government Pension statutory returns
- Manage Teacher's Pension and Local Government Pension End of Year Certificates
- Manage the buyback of pensionable service for all staff
- Manage Auto Pension Enrolment for all staff every three years as per Government Guidance.
- Manage updates to Teachers' Pension and Local Government Pension contribution rates including deficit management
- Update the MIS in respect of Teaching and Support Staff pay scales
- Prepare Teachers Salary Statements on an annual basis
- Administer Teaching and Support Staff pay awards,
- Prepare all year-end documentation including requesting FRS17, pension actuary valuations
- Prepare the Gender Pay Gap report, and submit to the Government

Finance

- Accounting Officer and Responsible Officer reporting
- ESFA/DfE returns
- External Auditors
- Internal Audit Service
- Central Finance Support Service
- Budget Setting
- Budget Monitoring and Management Accounts
- Year End and Annual Accounts
- Annual Accounts Return
- Payment Analysis Reporting
- IR35 guidance
- Land and Buildings Collection Tool Return
- School Resource Management self-assessment tool
- Regular finance and admin meeting with Office Managers and Business Managers.
- Procurement of Insurance requirements not covered by Risk Protection Arrangement (RPA)
- Procurement of Trust wide service level agreements or arrangements
- Source best value for money through collective purchasing

Administration

- Trust-wide training opportunities (eg. GDPR, H&S, safeguarding) as required
- School visits to support office/admin staff with areas of concern
- Support with set-up of essential documents and templates such as Single Central Record and guidance on how to maintain this
- Provision of guidance documents and templates for school administrative tasks.
- Maintenance of the Trust's Website including links to individual school websites
- Policies
- Legal Advice
- GDPR support

Estate Management

- Compliance Monitoring
- Risk Assessments
- Policies templates
- Critical Incident Management Plans
- Business Continuity Plans
- Arrangement of Condition
- Asset Management Plans
- Fire Safety Management
- Termly Meetings for Premises Staff
- Trust-wide caretaker support (as an additional cost)

The Bath and Mendip Partnership Trust will review this policy on an annual basis at the beginning of each financial year. Where appropriate the top-slice may be adjusted to reflect the costs related to that financial year; the increasing of services provided directly by the Trust or cost savings generated through streamlining of back office functions. Any funds remaining at the end of the financial year are retained and carried forward to the new financial year.

Appeals

The Academies Financial Handbook states:

If a constituent academy's principal feels the academy has been unfairly treated, they should appeal to the trust. If the grievance is not resolved, they can appeal to the Secretary of State, via ESFA. Where ESFA receives an appeal, it will review the process that the trust has followed, including whether the trust has considered the funding needs of the constituent academy, and whether the trust's internal appeals process has been applied. ESFA will provide the constituent academy and the trust with the opportunity to provide any evidence they feel is relevant to the case. ESFA's decision will be final and can result in the pooling provisions being dis-applied.

This is set out in paragraphs 5.29 and 5.30 of the Academies Financial Handbook, which [can be downloaded here](#).

Appeals Process

An Academies have 10 working days from the date of issuing the contribution statement to appeal

Appeals should be made in writing to the CEO who will consider the appeal and notify the Academy of their decision within 10 working days of receipt of the written appeal.

If the academy is dissatisfied with the decision from the CEO, they are entitled to appeal against this to the Board of Trustees. A minimum of three trustees will investigate the original appeal from the Academy and come to the decision and advise the academy accordingly.

If the Academy is still dissatisfied with the outcome, they are entitled to appeal further to the Education and Skills Funding Authority. This is stage 3 and the final stage in the appeals process.

This policy is reviewed by the Audit and Finance Committee on annual basis and approved by the Board of Trustees.