



BDMAT
Birmingham Diocesan
Multi-Academy Trust

Schools Contribution Policy

Issued: July 2018
Next review due: Summer 2021

1.0 Introduction

1.1 The Academies Financial Handbook, 2017 states

- *A multi-academy trust has the freedom to amalgamate a proportion of GAG funding for all its academies to form one central fund. This fund can then be used to meet the normal running costs of any of its constituent academies within the trust. In accordance with its funding agreement a multi-academy trust must not pool PFI funding.*
- *The multi-academy trust must give individual consideration to the funding needs and allocations of each constituent academy and must have an appeals mechanism in place. If a constituent academy's principal feels that the academy has been unfairly treated, they should first appeal to the Secretary of State, via ESFA, whose decision will be final and can dis-apply the provision for pooling in this handbook in relation to the multi-academy trusts.*

1.2 This policy sets out the approach taken by the Birmingham Diocesan Multi-Academy Trust (BDMAT) in respect of the above and will apply to all schools in the Trust as at 1st September 2017 and all those that join the Trust after this date.

1.3 An appeals mechanism is described within this policy document for academies that may feel they have been treated unfairly by the Central Funds process.

2.0 Trust Funding from Schools

2.1 Each year the Trust will retain 5% of the GAG funding for each constituent school. For clarity, this **excludes** the funding each school receives in respect of:

- Pupil Premium funding;
- PE Sport grants;
- nursery funding;
- funding for Universal Infant Free School Meals;
- Summer School funding;
- other non-GAG Government funding;
- top-up funding for special educational needs (SEN) or additional educational needs (AEN) in mainstream academies;
- other income generated by individual schools.

2.2 The Trust will consider the funding needs and allocation of each constituent school.



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2.3 A statement will be issued to constituent schools no later than 31st August for the next financial year, detailing the funds to be retained by the Trust. The constituent schools will have a period of 10 working days to appeal.

3.0 Use of Central Funds

3.1 The funds retained by the Trust will be used to fund the following expenditure on behalf of the schools within BDMAT.

- Trust salaries including CEO, Finance Director, Central Finance Team, Central Education Team and Central Administration.
- Support with negotiations with the Local Authority (LA) on all individual academy matters.
- Negotiations with the LA on academy matters at a strategic BDMAT level.
- Relationships with the LA, Department for Education (DfE), Education and Skills Funding Agency (ESFA) and Regional Schools Commissioner (RSC) at a strategic BDMAT level.
- Relationships with the Diocesan Board of Finance (DBF) and Diocesan Board of Education (DBE).
- Monthly briefing sheets / bulletin on all relevant topics.
- Annual BDMAT headteacher conference.
- Facilitated school to school networks.
- Succession planning.
- Risk management at Trust level and the preparation and oversight of BDMAT risk and issue registers.
- Basic telephone and e-mail advice and support as required.
- Administration of SIAMS support and advice pre and post inspection if relevant.
- Access to and information on education resources via electronic mailings and the MAT diocesan website.
- Attendance and support through head teacher and deputy headteacher appointment processes (interviews and preparation meetings).
- Access to new headteacher induction programme, access to NQT programme, pastoral support, including in times of crisis.
- Initial advice on legal issues related to Church school property, site ownership and trust deeds.
- Invitation to all training opportunities and events, including bespoke training (staff or governors).
- Support through the Ofsted process.



3.2 School Improvement

- Support and challenge through a minimum of six visits a year.
- A tailored offer developed in conversation with school leaders, around the concepts of regular external review, monitoring and evaluation.
- In-depth data analysis carried out by the School Improvement Advisor/CEO and shared with the school's assessment lead and senior leaders.
- Target setting support provided through FFT Aspire and School Improvement Advisor.
- Capacity building with individual schools and between schools, through a quality assured leadership programme developed from NQT through to executive headteacher providing MAT CPD opportunities to develop and share leaders.
- Self-sustaining school improvement provided through training and appointment of area/subject specialists to work across the MAT.
- Develop leaders to lead beyond their own school.
- Opportunities to work in partnership with existing centres of educational excellence through development of relationship with a local Higher Education provider to give access to research and development and masters programmes.
- Quality assured training and network opportunities (including an annual leadership conference and middle leader networks).

3.3 Safeguarding

- An initial safeguarding audit.
- Advice and guidance on the single central register.
- Support in dealing with allegations against staff etc.
- Guidance on mandatory training.
- Regular updates.

3.4 Finance and Business

- Strategic finance support from a central finance function.
- Support for all financial, back office and business support functions.
- Provision of the financial policy, policy setting and liaison with the ESFA.
- Bespoke financial package – all schools will be expected to operate the same financial software as provided by BDMAT (Hoge 100).
- Annual finance software licences.
- Training and support.
- Budget setting software.
- 1 – 3 year budget preparation and management support.
- Budget monitoring.
- Procurement, best value and contract negotiations.



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- Support with applications for additional grants and funding opportunities.
- Management of all month end procedures and submissions e.g. VAT returns.
- Preparation of monthly management accounts, if required by the school.
- Regular budget meetings with the headteacher, LAB, CEO and BDMAT.
- Support with the administration of the Teachers' Pension Scheme and Local Government Pension Scheme including annual certificates and audit administration.
- Preparation and submission of the SORP - charity accounts.
- Completion and submission of all reports required by DfE and ESFA.
- Ensure compliance to the academies handbook and accounts direction.

3.5 Human Resources

- Strategic HR advice.
- Head teacher recruitment.
- Support with headteacher's performance management/CPD/training.
- Recruitment at all levels utilising the discounts of a larger company, including contract negotiation, and ensuring the corporate image of BDMAT is protected.
- Negotiations with Unions.
- Review of HR practice and disseminating best practice.
- Advice and support to Headteachers and Local Academy Boards so they can carry out their responsibilities.
- Access to specialist HR legal advisers.
- Support with day to day HR queries.
- Payroll.

3.6 Governance

- Support and advice for Local Academy Boards (LABs).
- Training and continued support of the LAB.
- CPD/training opportunities for governors and staff.
- National Governor Association membership.
- Processing LAB appointments.
- Chair of Governors' network group.
- Recruiting, developing and training for effective governance.
- Maintenance of governor database.
- Support with skills audits.

3.7 Health and Safety

- Up to date policy documentation through the development and coordination of common policy and best practice.
- Advice on occupational health.

- Access to educational visit training.
- Coordination of annual monitoring visit which will include checks to ensure the academy school's testing regime is up to date.

3.8 Admissions

- Advice on admissions consultations.
- Advice and support for admissions.
- Liaison with LA admissions teams.
- Strategic response to changing admissions needs.
- Attendance at meetings.

4.0 Central Reserve

- 4.1 In addition, the Trust will build a central reserve which may be used for Capital expenditure or to help to alleviate financial pressures within individual schools during periods of fluctuating income and expenditure. From September 2017 the upper limit of the reserve shall be calculated as £100,000 plus £20,000 per constituent school, to a maximum of £300,000. These may be adjusted for inflation, or if otherwise recommended by external organisations providing services to the Trust.

5.0 Appeals

- 5.1 As required by the ESFA Academies Financial Handbook, schools have the right to appeal if they believe they have been unfairly treated in connection with central funds. Within BDMAT, constituent schools have 10 working days from the issuing of a settlement statement from the Trust to the School in which to appeal. Appeals should be made in writing direct to the CEO.
- 5.2 The CEO and Directors will consider the appeal and will notify the school of their decision within 10 working days of receipt of the written appeal.
- 5.3 If the schools wish to appeal the decision of the CEO and Directors, then a second appeals board will be convened. Appeals need to be received in writing to the Chair of the Trust Board within 5 working days of the previous decision. This board will consist of 3 new Directors and will notify the school of their decision within 10 working days of the meeting of the appeals board.
- 5.4 In the event that this does not resolve the school's grievance then the school has the right to appeal to the Secretary of State via the ESFA, whose decision will be final.