

**GROWTH PAPER**  
**March 2023**

**Governance Offer**

**School Improvement Offer**

**Operational Delivery Offer**

**Finance Delivery Offer**

**Background**

Great Heights Academy Trust's (GHAT) current planning is for measured growth of around two schools per year. Our overall aim is to incorporate good or outstanding schools, with a significant improvement capacity, in addition to schools that are vulnerable when they join the Trust. We anticipate that, in order to be in a position to benefit from economies of scale and to continue to have a significant educational impact over a number of schools, the Trust needs to work towards having at least 10 to 12 schools. These could be grouped in clusters of up to 6 schools in Calderdale, Kirklees and Leeds.

The DfE White Paper "Opportunity For All" was very supportive of multi-academy trusts (MATs) and encouraged all schools and academies to be part of a family of schools in a strong academy trust. The recommendation that MATs serve a minimum of 7,500 pupils or run at least 10 schools was a good base to aspire to. From April 2023, GHAT will serve around 4,500 pupils and run eight schools. We plan for continued Trust growth: 2 further schools in 2023/24 and again in 2024/25, which would take the Trust to 12 schools by September 2024.

**Proposal**

GHAT plans for measured growth, so that we can continue to support our current trust schools effectively, with quality and standards maintained, whilst it is probable that other schools, academies and small academy trusts may ask to join GHAT. In addition to prospective joiners sharing the vision and values of GHAT and being relatively close (probably in Calderdale, Kirklees or Leeds) our parameters for future growth are:

**Good or outstanding schools/academies – probably via a voluntary approach**

- Significant school improvement capacity
- Strong senior and middle leadership
- Sound financial position – now and in the future
- No significant intake issues

**Vulnerable schools – probably proposed by the Regional Director**

- Potential to contribute to the Trust school improvement capacity in the medium term
- Senior and middle leadership have the potential to be strong in the near future
- To have or have the potential to have a balanced budget in the near future
- Any significant intake issues are capable of resolution in the near future

**Key agreements as part of growth include:**

- MAT mission and purpose
- Vision and values
- Schemes of delegations
- Linking MAT operating models and structures to enact the above
- Centralised services and offers
- School Improvement, support and challenge offers
- Governance support
- Alignment with performance outcome indicators

With any potential joiners, we would be keen to discuss and plan appropriately for areas such as 'autonomy', 'culture' and 'funding' – aligning and/or revisiting our current schemes of delegation in connection with the [Academy Trust Handbook](#).

As part of this growth strategy these agreements will need constant review and evaluation to sense-check, adapt and adjust strategies in order to respond to changes of scale. A trust board sub-committee for MAT growth would be proposed in support of change management.

We recently explored our agreed values as part of our new 2-18 trust growth which provide a current positioning from our staff and leaders.

**"What are the features of a high trust working environment?"**



## Growth Rationale and Capacity

Use of existing expertise is key to maximising our delivery offers including:

- GHAT regional and national activity continues to connect our academies to expertise beyond that available locally: our unique roles in national School Improvement (TSIO) and workforce development (SCITT, Research School & English Hub)
- Successful SCITT training both primary and secondary students
- Good knowledge and positive relationships with partners within Kirklees, Calderdale and Leeds Services.
- Strong track record of school improvement, see our School Improvement support and challenge offer; all three Ofsted reports during 2021-22 referenced the positive impact of GHAT involvement
- The contribution from our core team expertise including our designations continues to enable us to prioritise 'developing great teachers' alongside 'staff retention planning' and meaningful collaborations

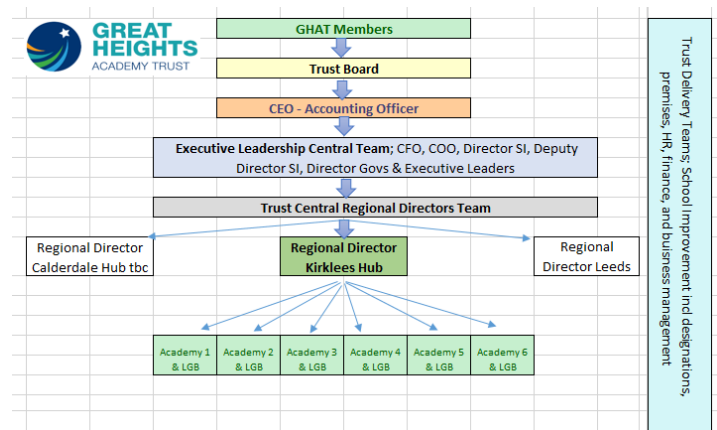
A major growth element is a strengthened 2-18 offer within all our localities. Our current secondary offer, is supported via expertise and connectivity to partners including:

- Newly appointed Deputy Director of School Improvement for secondary with recent Headship experience and specialism in curriculum development. Supported by Executive Leadership from our 2 new secondary partner academies joining us from February 2023
- External SIP partner – Mr Alan Giles – Secondary Headship/Leadership & Ofsted expertise to date
- Strong secondary leadership experience within the trust board with the Chair and Vice-Chair roles
- Secondary partnerships - Oldham 6<sup>th</sup> Form College – Associate Research School and East Manchester TSH

## Capacity Planning for Growth at Scale

Our operating models which are led by the CEO, CFO and COO require continuous development of teams and systems. Streamlining processes, system development and scaling up of operating teams is key to the clarity of our offers and to safeguard against potential workload and wellbeing strains during any growth period.

The creation of a trust central regional team to develop a hub-based offer is a major part of the 2023-24 offer.



## Trust Growth – Risk management

*“It’s all about school-led improvement and the key thing about due diligence is having a robust process which identifies any potential risk to your MAT in taking on a new school...effective due diligence determines what the school needs to improve and whether your MAT has the capacity to drive that improvement. It also asks questions around how you are going to manage costings and finances. The due diligence process will uncover whether there are any other liabilities hanging over that school, from the poor state of the school building to the possibility of a parent or teacher suing the school. It will go through all the major areas and leave you with this question to ask: ‘As a MAT, where are those resources required to improve this school going to come from...’”*

[Achieving Successful and Sustainable Growth](#) – Optimus Education

A key aspect of trust growth is the robustness of our due diligence, the use of external advisors to assess risks and future positioning as part of a trust board sub-committee to support acceptance of conversions.

A. Bennett CEO & C. Midgley CoG

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**Why do we ensure Governance support and challenge?**

*“So that trusts continue to be responsive to parents and local communities, all trusts should have local governance arrangements for their schools”*

*‘Opportunity For All’, Department for Education, March 2022*

GHAT’s vision has always included effective governance, including local governance. We believe that, in strong trusts, each Local Governing Body (LGB) adds value as it can focus on one school, one community and play a key role in understanding the needs and maintaining a school’s identity within the trust. As the trust grows, these aspects become even more important for overall trust strategic governance.

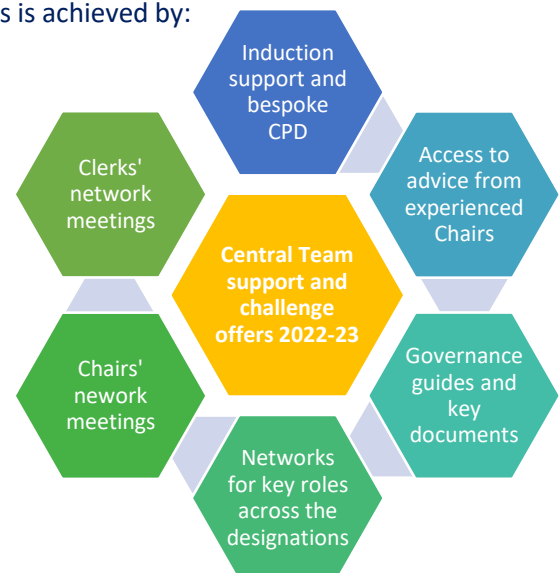
GHAT believes that the key benefits offered by LGBs are:

- **Enhanced accountability:** they form the bridge between the Trust Board and its schools as they are ‘the eyes and ears’ of the Trust Board at school level
- **Visible governance:** they are a powerful advocate for the Trust’s vision and values at the local level, helping to retain active engagement with the school and the wider community
- **Accountable governance:** they keep the Trust answerable to its stakeholders, providing a mechanism for the Trust to listen to parents, staff, pupils and others in the community
- **Checks and balances:** they provide a valuable source of challenge to the Trust Board and the central team, essential to good governance and leadership

All governors and trustees have support and CPD available to ensure they are up-to-date with current guidance/ legislation and can challenge and support leaders effectively. We ensure all involved are given the right information in a consistent format to feel confident that they know their school well – the strengths and areas for development.

Currently, many schools nationally are struggling to fill governor roles and ensure governors have the knowledge and understanding to become effective in their duties. The GHAT Governance team works with all our academies, designation leaders and trustees, in a supportive way, to achieve the appropriate level of challenge and support whilst continuing to focus on the priority of delivering excellent teaching and learning. This is achieved by:

- Clear LGB Terms of Reference and Scheme of Delegation
- Continually monitoring and supporting our LGBs, we ensure we analyse the needs of governance at Trust level and at school/ designation level.
- Offering tailored support for each academy/ designation
- Bespoke support for each academy whether it be an existing academy, a new academy to the MAT, one with an established governing body or one with an Interim Executive Board
- A common format for meetings, agendas and reports to ensure a consistent approach
- Membership for all governors to the NGA. This ensures access to high quality support, training, networking and sector leading publications.



**What is our Governance offer?**

- Consistent procedures for reporting, agendas etc. to ensure information sharing and full accountability
- Support for Principals’ reports to LGBs to ensure key information is presented appropriately and consistently
- Links between LGBs and the MAT board – reporting LGB meeting outcomes to the board and any key questions/ concerns that have arisen; these are responded to with feedback/answers from the MAT board to LGBs
- Monthly Leadership Newsletters with updates and actions required around LGBs / Trust for all senior leaders
- Attendance of a Trustee and Director of Governance at an LGB meeting during the year
- Regular network meetings for LGB Chairs, named governors and clerks
- Induction support for new governors
- Bespoke LGB Governance training where required.

### **Who provides our governance offer?**

We have an experienced central MAT Governance team, in summary:

- Our Chief Operations Officer ensures overall compliance with all DfE governance requirements
- A Governance Professional oversees all aspects of governance effectiveness within the Trust, ensuring Members and Trustees meets all statutory and regulatory requirements
- A dedicated Director of Governance for leadership support who ensures that governance adheres to good practice
- A very experienced Trust Board Chair, who is on national groups to keep up to date with changing legislation and improving practice – over 20 years' experience of chairing a variety of primary and secondary academies
- A range of skilled and experienced Members, Trustees and Governors covering primary and secondary leadership, finance, legal, procurement, business, marketing and health
- Access to funded support from the National Governance Association, including its full CPD offer
- Access to the Confederation of School Trusts and its regular remote meetings
- Networking opportunities across the Trust.

### **When is our governance offer provided?**

A calendar of events and meetings is designed annually to align with the requirements of the reporting schedule of academies, local governing bodies (LGBs) and the Trust Board:

- Half-termly LGB meetings and Trust Board meetings plus an annual Members' AGM
- Trust Board Committee meetings – Termly Finance & Premises Committee and Standards Committee
- Regular network meetings for sharing practice, where people can learn with and from each other:
  - Termly meeting of LGB Chairs with CEO, Director of Governance and Trust Chair
  - Annual meetings of named Trustee with named Governors – Safeguarding, SEND and Pupil Premium
  - Termly meeting of LGB Clerks

### **Where is our governance offer provided?**

We are able to support all our academies on their own sites as well as group attendance at our Trust offices.

The **impact** and **track record** of our governance offer for all our schools as of the academic year 2022-23 has helped support their journeys, ensuring that now all Trust schools are at least Ofsted good or better.

Carlinghow Academy – Ofsted Inadequate 2018 (joined GHAT 2019-20) to Good, May 2022. *“The chief executive officer and governing body have been key partners in reshaping the strategic direction of the school. The executive leadership team knows the school well. It has worked alongside school leaders to drive rapid, sustainable improvements in school. Trustees perform the required statutory duties with care. They hold senior leaders to account. Teachers are well supported. They express their gratitude at being part of this strong staff team.”*

The Greetland Academy – Ofsted Outstanding, October 2021 – *“Support from the trust has been highly effective. Trust leaders work closely with the leadership team to make the school even better. Staff told inspectors that leaders, including governors, are mindful of their well-being and workload. They feel well supported by leaders”*

West Vale Academy – Ofsted Inadequate 2017 (joined GHAT 2018-19) to Good June 2022 – *“Trustees and governors have taken effective action to ensure a rapid pace of school improvement. The interim principal, appointed by the trustees, is leading an effective senior leadership team. Pupils are making good progress and achieving well. Governors are already working with the incoming principal to ensure that this improvement momentum is sustained seamlessly from September onwards.”*

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**Why do we ensure School Improvement support and challenge?**

GHAT demands that all of its schools have a continuous focus on School improvement and that all leaders have high aspirations and Expectations for all pupils. We believe we are all on a continuous journey to learn and know more.

Through our 'Continuous Quality Improvement' offer (CQI) we support a forensic analysis of need in each school and a linking differentiated support approach at each of the varying stages of an academy improvement journey. Our academies all share common values including promoting a climate for learning which promotes effective learning behaviours and a broad variety of teaching approaches. The Trust's workforce development team enable academy staff to engage with evidence, make informed research decisions and create a culture of reflection to ensure teachers, managers and leaders are as good as they can be in what and how they teach. This is a 2-18 offer with a national workforce development delivery footprint from our Research School and English Hub.

We feel it is important to provide assurances through appropriate challenge, our continuous quality improvement offer is further supported through our 'Continuous Quality Assurance' offer (CQA) where termly the MAT CEO and external partner meet to quality assure the ongoing school improvement work, provide support and challenge whilst holding senior leadership to account. Findings, next steps and celebrations of successes are reported to senior leaders at each academy who in turn share with their Local Governing Bodies and are part of the CEO's reporting to the trust board.



**What is our school improvement support and challenge offer?**

**CQI – Continuous Quality Improvement**

- Understanding need, leading a culture of improvement and building capacity for improvement
- Ensuring academies curriculum is ambitious in design and matched to meet the needs of the pupils in order to prepare them for their next stage of learning
- Quality assurance of senior and middle leader accuracy of judgements through joint termly monitoring
- Providing a coaching and mentoring offer to senior leaders
- Supports academies in evaluating the impact of specific pedagogies and interventions
- Deployment of workforce development team through MAT internal offer
- Deployment of commissioned support following identification of need
- Analysis of academies use of assessment and moderation.

**CQA – Continued Quality Assurance**

- Quality assuring the CQI processes
- Ensures leadership through moral purpose
- Understanding all academies both quantitatively and qualitatively
- Holding Senior Leaders to Account
- Support, challenge and agreement with self-evaluation form
- Support, challenge and agreement with school improvement plan
- Ensures Governance Structure and skills retain focus on school improvement.

**Workforce Development**

- Includes Research School, English Hub and SCITT providing both internal and external offer of school improvement
- Offers evidence based professional learning
- Provides capacity to recruit, develop and retain talent

- Provides opportunities for leaders to support their career progression with involvement in national programs
- Has teams of designated system leaders with specialisms in different areas and teaching phases
- Support with principled curriculum design
- Encourages, assesses and supports scaling up of innovation
- Designs and delivers high quality programmes and support
- Supports and empowers middle leaders as leaders of teaching.

### ***Who provides our school improvement, support and challenge offer?***

We are uniquely placed with our own dedicated internal teams who support our academies to ensure school improvement including workforce development is prioritised. In summary:

- Trust board with school improvement and leadership experience at all phases
- Dedicated standards committee with oversight of school improvement support and challenge
- Linking chairs of local governing bodies network which provides local oversight and support materials
- Dedicated Director of Governance for leadership support
- Dedicated Director of School Improvement with a team including primary and secondary academy leaders, executive leaders, workforce development teams and post holders for current initiatives
- Academy leaders, Deputy-Head and subject co-ordinator forums.

### ***When is our school improvement, support and challenge offer provided?***

A calendar of events is designed annually with continuous support for CQI and workforce development alongside termly CQA including:

- Forensic assessment of data, a supported MAT assessment systems and processes
- Annual SDP (AIP) joint planning with support and planned offers from our workforce development teams
- Termly networks of leaders and managers to learn with and from each other
- Continuous opportunities to be part of research trials and roll out of latest innovations
- Set half termly CQI joint events with SI team support
- Set termly CQA events with SI team support for any external challenge
- Timetabled events to match governance reporting timelines and DfE expectations.

### ***Where is our school improvement support and challenge offer provided?***

We are able to support all our academies on their own sites with location-based hubs, at our Trust offices and have additional facilities available as needed.

The **impact** and **track record** of the above SI offer is clear with all our schools as of the academic year 2022-23 at least Ofsted good or better.

A key aspect is to engage in innovation to continuously respond and evolve to meet changing locality and national needs including our current ...

*[“Building a stronger, broader 2-18 trust offer in West Yorkshire – 2022-23 Stakeholder Overview.”](#)*

We are interested in working in partnership with those seeking to join our family of academies, both those wishing to contribute as capacity givers and those who for a shorter time-frame may need additional support.

<https://greateightstrust.org.uk/contact-us/>

Carlinghow Academy – Ofsted Inadequate 2018 (joined GHAT 2019-20) to Good, May 2022. *“The CEO and governing body have been key partners in reshaping the strategic direction of the school. The executive leadership team knows the school well. It has worked alongside school leaders to drive rapid, sustainable improvements in school. Trustees perform the required statutory duties with care. They hold senior leaders to account. Teachers are well supported. They express their gratitude at being part of this strong staff team.”*

The Greetland Academy – Retained Ofsted Outstanding, October 2021 – *“Support from the trust has been highly effective. Trust leaders work closely with the leadership team to make the school even better. Staff told inspectors that leaders, including governors, are mindful of their well-being and workload. They feel well supported by leaders. Staff are extremely proud to work at the school.”*

West Vale Academy – Ofsted Inadequate 2017 (joined GHAT 2018-19) to Good June 2022 – This comment, written by a West Vale parent, is typical of many parents’ and carers’ comments: *“West Vale has come a long, long way. I think as a school they have made massive progress.”* Inspectors agree. Trustees and governors have taken effective action to ensure a rapid pace of school improvement.

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**Why do we ensure Operational support and challenge?**

GHAT schools have a continuous focus on operational delivery and all leaders have high aspirations and expectations for the smooth running of operations. Schools need to ensure high standards of operations and make sure that they're following not only regulatory best practices but ethical best practices as well.

Headteachers Standards Section 7: Organisational Management:

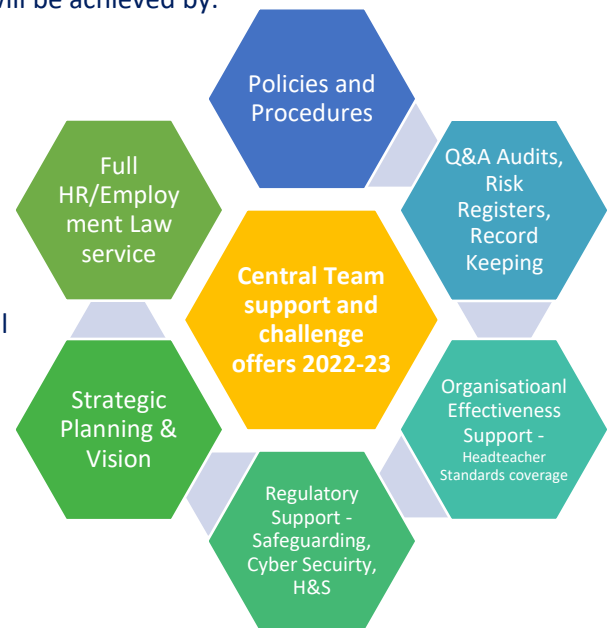
- ensure the protection/safety of pupils and staff through effective approaches to safeguarding as part of the duty of care
- prioritise and allocate financial resources appropriately, ensuring efficiency, effectiveness and probity in the use of public funds
- ensure staff are deployed and managed well with due attention paid to workload
- establish and oversee systems, processes and policies that enable the school to operate effectively and efficiently
- ensure rigorous approaches to identifying, managing and mitigating risk

Academy Trusts Handbook 2022 Statutory Duties include:

- safeguard and promote the welfare of children
- Health and Safety at Work Act 1974 and its regulations. GHAT, as an employer, is responsible for the health and safety of its staff, pupils, and any visitors.
- The DfE expects academy trusts to manage their school estate strategically and maintain it in a safe working condition

We believe we are all on a continuous journey of evaluating risk with the ever-changing challenges we face. At the heart of all priorities is teaching and learning with the Trust's remit to guide and support schools through the operational aspects that run alongside to ensure safety and compliance in all areas. This will be achieved by:

- Working with schools, whether on a collective basis or a bespoke basis, to continuously quality improve understanding of risk management
- The Trust's central team working with internal teams
- The Trust keeping abreast with current legislation, cascading information to all
- providing tools and procedures to ensure smooth operations
- providing assurances through appropriate challenge via operational effectiveness meetings with Principals; regular meetings with operational leads in schools
- Named Central Team link acting as a helpdesk for support and guidance
- Annual audits and adhoc checks
- Creation of action plans for areas requiring improvement



Findings, next steps and celebrations of successes are reported to senior leaders at each academy who in turn share with their Local Governing Bodies for comment and are part of the CEO reporting to the trust board.

**What is our operational support and challenge offer?**

**CQI – Continuous Quality Improvement:**

- Understanding staffing needs, aligning with budgets and an integrated curriculum for financial planning.
- Ensuring organisation charts, staff roles and structures, salaries and benefits align across the Trust
- Providing bespoke HR advice for support leaders with performance management, absence management and all aspects of HR employment law
- Recognised risks are embedded within all school development plans and plans are in place to drive improvement
- Ensuring Trust Strategic Estate Plans are planned for and funding opportunities utilised
- Quality assurance of senior and middle leader accuracy of compliance through joint termly monitoring

- Providing a coaching and mentoring offer to senior leaders
- Supports academies in evaluating the impact of action plans
- Deployment of Central Team through MAT internal offer
- Analysis of Census data for continuous tracking and triggers
- Support internal teams and offer hybrid opportunities of support
- Support and guidance with grant funding
- Full conversion support for new academies.

Carlinghow Academy – Ofsted Good, May 2022. *Trustees perform the required statutory duties with care. They hold senior leaders to account. They express their gratitude at being part of this strong staff team.”*

### **CQA – Continued Quality Assurance**

- In depth understanding of individual academy operations
- Quality assuring the CQI processes
- Ensuring leadership through moral purpose
- Holding Senior Leaders to account
- Support, challenge and agreement with action and school improvement plans
- Ensuring Governance Structure and skills retain focus on statutory obligations.

West Vale Academy – Ofsted Good June 2022 *“The arrangements for safeguarding are effective. Leaders ensure that all the necessary recruitment checks are made. All safeguarding policies are current and understood by staff”.*

### **Who provides our operational support and challenge offer?**

We are uniquely placed with our own dedicated central teams who support our academies to ensure compliance and risk management is prioritised and non-negotiables are met. In summary:

- Chief Operations Officer (COO) ensures compliance in all areas of business operations across the Trust
- Expertise in the delivery of academy conversions and Grant Funding
- Business Support Officers linked to each setting
- A dedicated HR Manager and team providing full HR package/services
- Health and Wellbeing Champion providing confidential support for all Trust staff
- Central Site Manager to support with risk assessments; audits; record keeping and premises queries
- Central IT Infrastructure Manager to support with ICT strategy; cyber security; risk management; IT support
- Trust board with leadership experience in insurance, risk and lease agreements
- Dedicated finance and premises committee with oversight of school operations support and challenge
- Experienced Academy Leader & Senior Leadership Teams providing a network of support.

### **When is our operational support and challenge offer provided?**

A calendar of events is designed annually with continuous support for CQI alongside termly operational effectiveness meetings including:

- Full on-site support during Ofsted Inspections
- Annual Health and Safety Audits
- Termly scrutiny and analysis of Census data
- Weekly monitoring of attendance and persistent absentees
- Spot checks during Exam weeks to ensure compliance with storage and administration of testing materials
- Annual Safeguarding audits and training
- Trust wide policies and procedures updates
- Internal staff resources web page with templates and guidance
- Ongoing review of contracts and SLAs to ensure value for money and benefits of bulk buying
- Monthly Leadership Newsletters with updates and actions required
- Continuous opportunities to be part of research trials and roll out of latest innovations
- Timetabled events to match governance reporting timelines and DfE expectations.

### **Where is our operational support and challenge offer provided?**

We are able to support all our academies on their own sites as well as group attendance at our Trust offices.

The **impact** and **track record** of our statutory obligations is clear with all our schools as of the academic year 2022-23 at least Ofsted good or better.

The Greetland Academy –Ofsted Outstanding, October 2021 – *“Support from the trust has been highly effective. Trust leaders work closely with the leadership team to make the school even better. Staff told inspectors that leaders, including governors, are mindful of their well-being and workload. They feel well supported by leaders”*



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**Why do we ensure Financial support and challenge?**

GHAT schools have a continuous focus on financial and operational efficiency to deliver value for money and effective use of public monies. All leaders are supported and challenged to work to the Trust aim that each academy achieves an in-year balanced budget in order to ensure financial sustainability in future years.

[Headteachers Standards](#) Section 7: Organisational Management:

- *prioritise and allocate financial resources appropriately, ensuring efficiency, effectiveness and probity in the use of public funds*
- *ensure staff are deployed and managed well with due attention paid to workload*
- *establish and oversee systems, processes and policies that enable the school to operate effectively and efficiently*
- *ensure rigorous approaches to identifying, managing and mitigating risk*

[Academy Trust Handbook 2022](#) includes the requirement for trusts to:

- *ensure that financial plans are prepared and monitored, satisfying itself that the trust remains a going concern and financially sustainable*
- *take a longer-term view of a trust's financial plans consistent with the requirement to submit three-year budget forecasts*

Currently all schools nationally are facing financial challenges and pressures. GHAT works with all our academies and designation leaders, in a supportive way, to achieve financial efficiency whilst continuing to focus on the priority of delivering excellent teaching and learning. This is achieved by:

- The Trust keeping abreast of DfE funding initiatives and policy changes (the CFO is a member of the ESFA's Academy Financial & Assurance Steering Group; and a Chair of one of their linking Working Groups)
- Provision of regular Leadership Update 'newsletters' to inform leaders and all staff on the latest financial updates
- Having a clear financial policies and procedure framework
- The Trust's central finance team working with appropriate individual academy personnel
- Providing financial assurances to senior leaders via financial & operational effectiveness meetings
- KPI, benchmarking and Integrated Curriculum Financial Planning analysis



**What is our finance delivery offer?**

- Provision of monthly academy level financial reporting and latest forecasts updates to ensure informed financial decision making; these reports are shared with LGB's during the year.
- Budget preparation and returns, working with academy leaders to agree budgets for Trust Board approval
- Completion of monthly Management Accounts
- Management by the central MAT team of all ESFA audit requirements, including the Annual Account & Report production; grant audit returns & internal audit functions
- Submission of all ESFA returns throughout the year
- Consistent accounting software across GHAT, using DfE chart of accounts to take advantage of automation efficiencies
- Single VAT registration and reporting
- Single bank account to enable a central payments facility; completion of bank reconciliations
- Asset register completion
- Alignment with existing academy staff and individual academy requirements around self-generated income and local pupil funding e.g. SEN, Nursery, OOSC
- Payroll monitoring and accounting
- Support academies in completion of their grant action plans e.g Pupil Premium and the monitoring of spending

- Support to academy staff on financial aspects and queries, including a named contact in the central MAT team
- Support finance and administration staff and offer hybrid opportunities of support as and when required
- Full conversion support for new academies

### ***Who provides our finance delivery offer?***

We have an experienced central MAT Finance team, in summary:

- Chief Finance Officer who ensures compliance with all ESFA requirements
- A Finance Manager who leads the finance team and supports the Chief Finance Officer and leaders in academies on their day-to-day budget management
- Finance Assistants, including a named link to individual academies
- Dedicated finance and premises committee, the Chair being a Director at KPMG and who is supported by Trustees who have a wide range of finance and business background and expertise.

### ***When is our finance delivery offer provided?***

A calendar of events is designed annually to align with the requirements of academies and the ESFA financial returns:

- Finance review meetings with academy leaders
- External and internal audit plans throughout the year
- Initial, draft and final budget setting meetings, including staffing planning, ahead of LGB and Board meetings
- Termly analysis of Census data to action any finance impact
- Monthly production of budget reports and Management Accounts
- Trust wide policies and procedures updates, including Schemes of Delegation
- Monthly Leadership Newsletters with updates.

### ***Where is our finance delivery offer provided?***

We are able to support all our academies on their own sites as well as group attendance at our Trust offices.

The **impact** and **track record** of our statutory obligations is clear with all our schools as of the academic year 2022-23 at least Ofsted good or better. We have an excellent audit track record of compliance and process.

ESFA Statutory returns: Since becoming an academy in 2011, timely submission of all returns. All Annual Report and Accounts have been unqualified.

BHP Internal auditor report March 2021: *“I agree it is a very good report you and your team should be pleased.”*

Carlinghow Academy – Ofsted Good, May 2022. *Trustees perform the required statutory duties with care. They hold senior leaders to account. They express their gratitude at being part of this strong staff team.”*

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