

Business Plan 2026/2027



Symphony Learning
TRUST



20

Schools



6,011

Pupils



£34M

Total budget



873

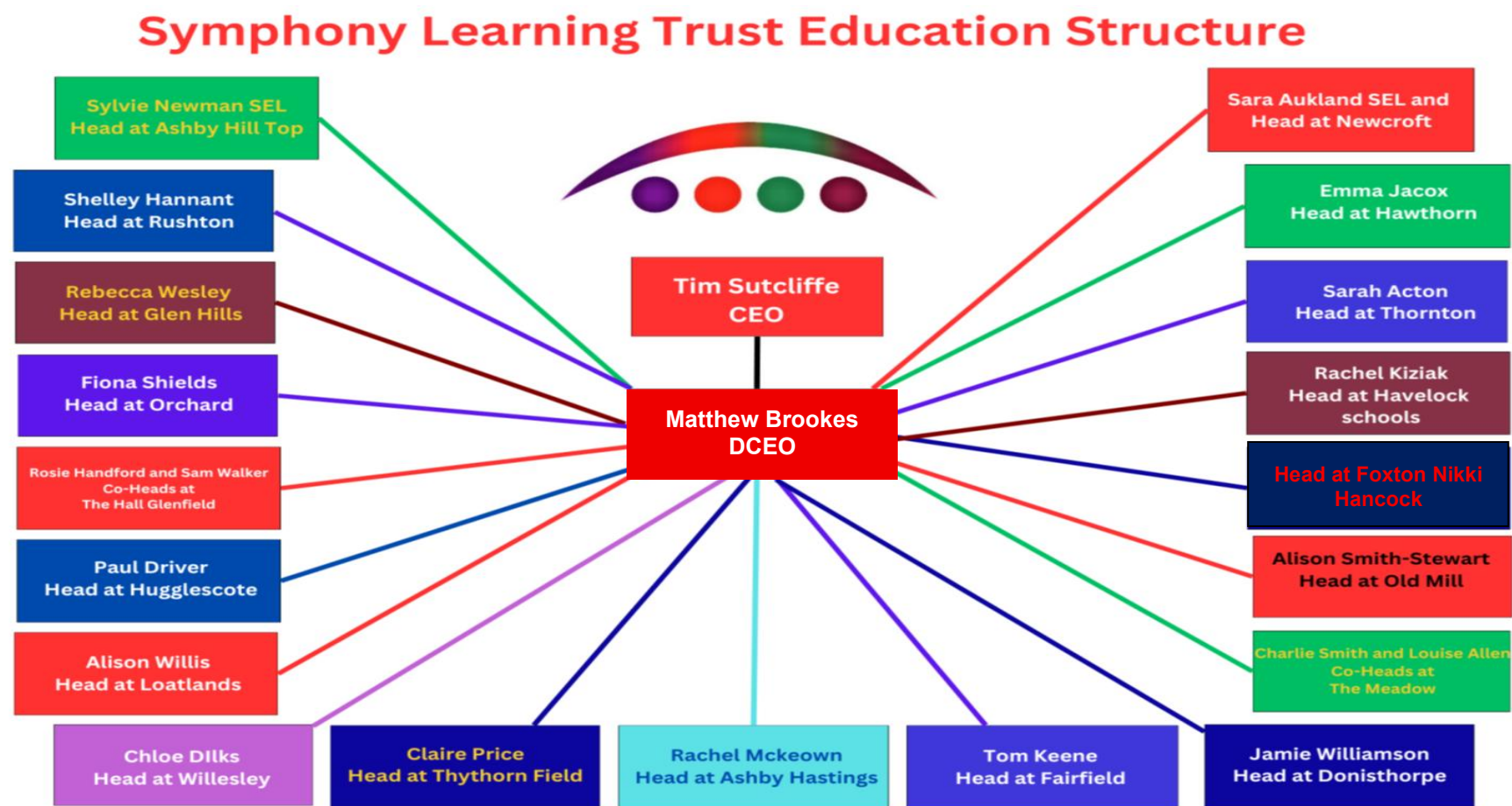
Staff

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Introduction

Symphony Learning Trust was formed on the 1st September 2016, by the following schools:- Ashby Willesley Primary School; Fairfield Primary School; Glen Hills Primary School; Newcroft Primary Academy; The Meadow Community Primary School and Pre-school; Thornton Primary School. In September 2017, Old Mill Primary also joined the Trust. In Autumn 2021, Ashby Hastings became the eighth Symphony school as a free school. Orchard Primary joined in April 2022 and Donisthorpe and Ashby Hill Top Primary Schools joined in September 2022 and Foxton Primary School joined in September 2024. In September 2025, The Hall School Hugglescote and Thythorn Field Primaries joined. As part of a coherent vision to act together in a deep partnership, the trust was formed with a Board of Members, Trustees (with a non- trustee CEO) and Local Governing Bodies. The Trust is open to other schools joining as determined and agreed by the Trustees.

Education Leadership - The Academies are led by Head teachers and Executive Heads, thus:



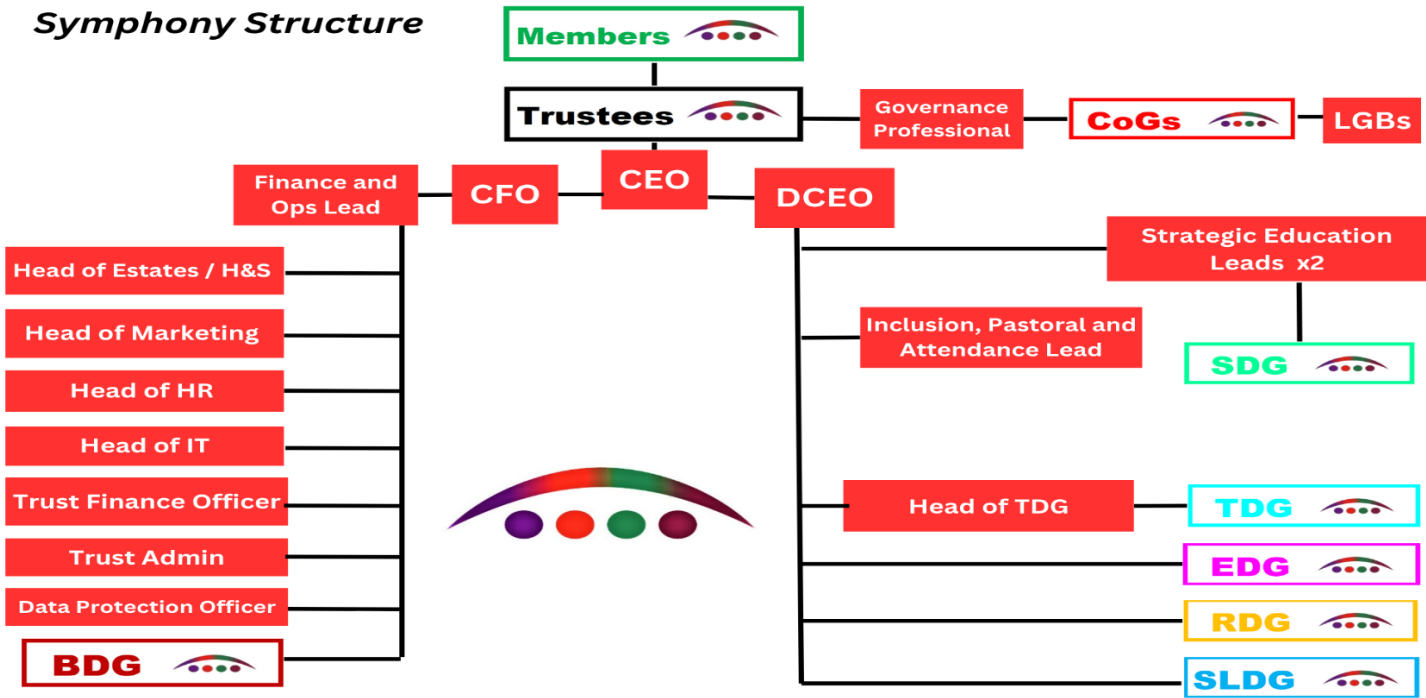
With Symphony's determination to improve the educational outcomes of all the children and young people it is directly responsible for, we recognize that this will only be achieved through the recruitment and retention of a high quality and committed workforce. To this end, the Trust aspires to be the *employer of first choice* within the area. We intend to develop, implement and embed a recruitment and retention strategy based on a positive ethos within all our academies, delivering workload reform, outstanding professional development and enhanced career opportunities for staff. This plan is deliberately focused on a few objectives that we believe will have a significant impact on the quality of teaching and learning, removing barriers to achievement and enhancing educational outcomes.

Object

The Company's 'object' is specifically restricted to the following:

- a) *To advance for the public benefit education in the United Kingdom, in particular but without prejudice to the generality of the foregoing by establishing, maintaining, carrying on, managing and developing a school offering a broad and balanced curriculum ("the Academy").*
- b) *To promote for the benefit of the inhabitants of Glen Parva and the surrounding area (which we take to be wider than solely Glen Parva) the provision of facilities for recreation or other leisure time occupation of individuals who have need of such facilities by reason of their youth, age, affinity or disablement, financial hardship or social and economic circumstances or for the public at large in the interests of social welfare and the object of improving the condition of life of the said inhabitants.*

Structure - overview





Members – (five)

- Four external to the Trust and one from the trustee board;
- Meet at least once per year (or as required);
- Presentation of accounts;
- Report presented by the Trustees (overview of performance).

Symphony Learning Trust has “Members” who are best viewed as guardians of the constitution, changing the Articles if necessary and ensuring the charitable object is fulfilled. The Members appoint the Trustees and can exercise reserve powers to appoint and remove Trustees but it is anticipated that this power will be rarely exercised. The Academy Trust will ordinarily have at least five Members.



Trustees-

- No trustees will be employed by the SLT;
- From January 2018, a programme of trustee replacement advised by Academy Ambassadors to ensure no trustees have an interest in a school within the Trust as a local governor;
- Appointed by the members based on skills audit;
- Meet termly;
- Presentation of an overview of performance of each individual school;
- Strategic approach to agree priorities for the MAT;
- Utilise skills-based expertise to delegate resources.

The corporate management and trustee responsibility for the actions of the company is vested in the “Trustees” of the Academy Trust (together, referred to as “the Trust Board”), who are company directors registered with Companies House. The Trustees are personally responsible for the actions of the Academy Trust and the Academies and are accountable to the Members, to the Secretary of State for Education and to the wider community for the quality of the education received by all pupils of the Academies and for the expenditure of public money. The Trustees are required, as trustees and pursuant to the Funding Agreements, to have systems in place through which they can assure themselves of the quality, safety and good practice of the affairs of the Academy Trust. The role of the Trust Board is reflected in the ‘21 questions that every Multi-Academy Trust should ask itself’ identified by the All Party Parliamentary Group on Education Governance and Leadership (January 2015) and set out in Appendix 1 of this Charter:

- Setting the vision, ethos and strategy for the Academy Trust and its academies over the next three to five years;
- Establishing the governance structures for the Academy Trust, from Members to school level, in keeping with the Articles of Association;
- Providing clarity, through the published Terms of Reference and the Roles and Functions Matrix, of the level at which the following governance functions are exercised:

- Determining each individual school's vision, ethos and strategic direction
- Recruiting each school's Head teacher or Executive Head teacher
- Performance management of each school's Head teacher
- Determining Human Resources policy and practice
- Oversight of each school's budget
- Assessment of the risks for each school.
- Setting the level at which the LGBs will have authority and accountability through the scheme of delegation;
- Engaging with the school's communities, parents, pupils and staff;
- Contributing to developing collaborative relationships beyond the Academy Trust;
- Ensuring that there is a strong and effective executive leadership structure and personnel in place across the Trust;
- Overview and scrutiny of school's education performance data;
- Overview and scrutiny of the Academy Trust's financial capability and management systems to ensure compliance with the Academies Financial Handbook, and deliver best value for money;
- Ensuring senior leaders within schools are challenged to improve the education of pupils;
- Developing the Trust Board to ensure that it has the capacity, skills and succession plans to have a positive impact on outcomes for pupils.
- The Trust Board sets Trust-wide policy.

Trust Board Sub-Committees

Trust Board Sub-Committees will provide the overview and high-level scrutiny of the prioritised risks.

The Trust Board Sub-Committees are:

- Finance (this includes Risk and Audit)

The working groups of the SLT are as follows;

Educational Development Group



The Symphony Learning Trust “Educational Development Group” is the management arm of the Academy Trust, focusing on operations and the educational performance of the Academies. They operate under the leadership and direction of the CEO, accountable to the board of Trustees. The EDG work directly with the staff in each Academy and the Local Governing Bodies to ensure that the required outcomes are achieved in accordance with the direction and vision of the Trust Board. The EDG focuses on ‘Educational Standards and Performance’. The EDG devise the strategy for intervention and school to school support as well as monitoring standards in all schools.

Business Development Group



The Symphony Learning Trust 'Business Development Group' is the team which manages the strategic aspects of finance and personnel across the Trust. They report to the CEO and to the Trust Finance Committee. The CFO and Finance and Operational Lead are members of this group.

Senior Leadership Development Group



This team consists of all Deputies and Assistant Heads and meets three times per year. It offers CPD and mutual support for senior leaders.

Teaching Development Group



This team consists of Maths leaders, English leaders, Phonics leaders, SEN leaders and EYFS leaders. These employees of the Trust, who all work for Symphony schools, are subject experts who offer specialist curriculum support where necessary.

Research Development Group



The Symphony Learning Trust "Research Development Group" is the team which meets to plan for improvements and innovation to Teaching and Learning across the Trust. It comprises of a fluid group of professionals with expertise in whichever particular area is a focus for the Trust.

Subject Development Groups



The Subject Development Groups are designed to share expertise and distribute knowledge of the most up to date local and national priorities. This group reports to the School Improvement Team. Each group comprises subject/area leaders from each school in all subjects.

Local Governing Bodies (LGBs)

The role of a Local Governor within a Multi-Academy Trust is an important one. In developing our governance arrangements, the Trust Board has sought to ensure that the responsibility to govern is vested in those closest to the impact of decision making and that such responsibility matches the capacity of those assuming responsibility. The Trust Board establishes Local Governing Bodies for each of the Academies, for the most part made up of individuals drawn from the Academy's community, both as elected and appointed members. The Local Governors are accountable to the Trust Board (who, in turn, are accountable to the Department for Education) as well as to the communities they serve. The broad duties of the Local Governing Body are summarised as:

- To contribute to and fulfil the vision and ethos of Symphony Learning Trust in so far as it relates to the Academy, ensuring that the Academy achieves the aims and ambitions it has for its pupils, having regard in particular to the benefits of being part of a family of schools which stresses the importance of collaboration and mutual support;
- To implement and review from time to time the strategic plan for the Academy, focusing on the Academy's performance and achieving sustained school improvement and having regard to any locally agreed priorities identified by the Trust Board and to the MAT Strategic Business Plan;
- To act as a critical friend to the Academy's senior leadership team, being ready to challenge and hold senior leaders to account for all aspects of the Academy's performance;
- To oversee the management of the finances of the Academy, assessing the annual budget prepared by the Academy's Head teacher or Executive Head teacher (with the support of the Academy's senior leadership team) and submitting such for approval by the Regional Board and the Trust Board, ensuring that the Academy works within its budget and the Academy's senior leadership team adopts and implements appropriate risk and financial management policies and practices;
- To support the Trust Board in ensuring that insurance or equivalent risk protection is put in place and maintained for all risk areas including damage to property, employer liability, public and third party liability and director liability in accordance with any policy issued by the Trust Board from time to time;
- To support the Academy's Head teacher or Executive Head teacher in the development and review (from time to time) of an appropriate staffing structure for the Academy, ensuring there is robust and accountable monitoring of the performance of staff and implementing all and any policies relating to staff adopted by the Trust Board;
- To support the Trust Board in its monitoring and evaluation of the delivery of any central services and functions provided or procured by the Academy Trust for the Academies, reporting any issues or concerns to the Executive Team (which includes the CEO) or the Chair of the Trust Board;
- To promote within the organisation and externally the benefits of collaboration with the other Academies and to actively seek opportunities to work together either with the aim of improving economic efficiencies within the Academies or identifying and implementing best practice;
- To develop effective links within the Academy's community, communicating openly and frequently as appropriate and ensuring that the Academy meets its responsibilities to the community and serves the community's needs in relation to the safeguarding and education of its pupils; and
- To engage fully and openly with any inspection of the Academy, whether by the Trust Board, the Executive Team, Ofsted or any other appropriate public body to whom the Academy is accountable.

Pupil, parent and staff voice

Accessing and responding to pupils' collective concerns is an important part of the operations and governance of Symphony Learning Trust academies. All schools have active School Councils with representatives from each year group. Each LGB is expected to give due regard to issues that are raised through the School Council and the management actions taken in response to the issues. Parental voice is formally built into the governance structure with the election by parents of two parent Governors to each LGB. Staff voice is similarly built into the governance structure with the election to each LGB of at least one employee of the Academy by employees of the Academy as well as the Head teacher / Executive Head teacher. As a Trust we will consider what further mechanisms for pupil, parent and staff representation at other governance levels may be appropriate.

Key Aims 2026-2029

- All schools have an OFSTED rating of at least Expected Standard and many Strong Standard outcomes.
- To have a robust school monitoring and support strategy to ensure the best possible outcomes for all children in Symphony Learning Trust;
- All schools (which have been in SLT for at least two years), achieve above the national expected average by the end of KS2;

Overview: Composition of Governance elements

Symphony Learning Trust - MAT Governance:

Trust Members:

Comprising of:

- a) The Chair of Trustees
- b) Persons appointed by the Members by special resolution

The Trust Board - Trustees: Comprising of Trustees appointed by the Members, including

- No members of staff;
- No more than 19.9% local authority; influenced persons who are trustees/ members.

Trustee Committees: Comprising of Trustees with appropriate skills, knowledge and experience

- Finance Committee (e.g. all finance, HR, H&S, property) including the CEO as Accounting Officer
- Audit Committee (including Risk)

Local Governing Bodies:

The membership of each LGB shall be as follows (unless the Trust Board resolve otherwise for an individual academy/school):

- Two parents elected or appointed in accordance with the articles of association.
- Either the executive headteacher or headteacher in an ex-officio role. Where there is a head of school in addition to an executive headteacher role the ex-officio role must be filled by the 'headteacher in law' with the other party able to attend LGB meetings in a non-voting capacity.
- Either one or two staff governor(s) elected by staff of the academy in addition to the ex-officio headteacher role.
- Between three and nine other local governors appointed by the local governing body with reference to particular skills and competencies. This can include other parents but not employees of the trust

Teaching, Learning and Assessment Strategy

The Symphony Learning Trust is seeking to further improve the quality of teaching and learning through developing a data and feedback informed approach to teaching and learning across its academies. All schools in the Multi-Academy Trust have access to the **Symphony On-Track** to ensure consistency for analysis of pupils' performance; this is supplemented by Symphony Learning Framework which provides support for teachers' planning in Reading, Writing and Mathematics. In order to continuously improve outcomes and opportunities for pupils in the MAT, all schools agree to:

- Share expertise to facilitate joint working
- Raise attainment and progress
- Improve teaching and learning
- Develop and Improve Leadership, Management and Governance at all levels
- Share expertise and knowledge
- Deliver a wide range collaborative events to inspire pupils' learning
- Moderate shared data

Schools in the Symphony Learning Trust each have a distinctive ethos according to the communities they serve. Planning schemes of learning is a complex task which benefits from the diversity that each Academy team brings. Each school's collaborative planning will be informed by experience, research and data, from the outcomes of pupil assessment and lesson study projects. We use subject leader network groups to help redefine and capture curriculum excellence and share it as widely as possible. Getting this right will mean that best practice becomes available to all staff in all Academies in the Trust so that all children may benefit from it. We plan learning not lessons, starting with the key concept or main idea to be taught, determining challenging milestones and end point success criteria.

Teachers will receive feedback on the quality of teaching and learning in their classes through formative and summative lesson observations, the outcome of pre-planned assessments and the use of lesson study, learning walks and book scrutiny. A range of professional development will be provided to assist teachers in their desire and efforts to improve. Teachers and Pupils will understand the next steps in their learning through high quality marking and feedback (both written and oral), formative, summative and diagnostic assessments. Time will be given, as appropriate, to reteach elements of the scheme of learning or for pupils to improve their work to a higher standard. Support for vulnerable groups, disadvantaged groups and for pupils with Special Educational needs will be planned and supported through the additional funding received for such purposes

SLT Core Objectives

Object Focus	Ref:	Outcomes	2026-2027	2027-2028	2028-2029
1. Leadership and Management	1a	Implement updated systems of due diligence as a framework for all schools in the MAT and a set of standards for schools to provide consistency in environment, communication, parental engagement, enrichment	Embed	Embed	Review / Implement
	1b	Implement a recruitment & retention strategy based on a positive ethos, professional development and enhanced opportunities for all staff in order that SLT can become an 'employer of choice'	Embed	Embed	Review / Implement
	1c	Implement a bespoke Quality Assurance Programme across the Trust with validation/peer review to continually challenge expectations in all schools	Embed	Embed	Review / Implement
2. Teaching, Learning and Assessment	2a	Implement a consistent and secure system of Assessment across the Trust to maximise pupil progress to drive standards forward	Embed	Embed	Review / Implement
	2b	Develop projects to improve pedagogy across the MAT	Embed	Embed	Review / Implement
	2c	Develop and implement systems of cross-MAT moderation and quality assurance	Embed	Embed	Review / Implement
3. Behaviour, Safety and Welfare of Pupils (including mental health)	3a	Implement rigorous safeguarding processes in all schools to ensure the highest standards of safety in all schools	Embed	Embed	Review / Implement
	3b	Implement the highest expectations of Behaviour for Learning in all classes	Embed	Embed	Embed
	3c	Embed a strong ethos in each school by promoting British Values and global citizenship	Embed	Embed	Embed
	3d	Develop systems for schools in supporting children's mental health and well-being	Review / Implement	Embed	Embed
4. Outcomes for Pupils and groups	4a	Year 6 – above national average for progress and for standards in all schools	Embed	Embed	Embed
	4b	Develop systems to ensure that all stakeholders uphold the values of Aspiration, Innovation and Excellence	Embed	Embed	Embed
	4c	Outcomes for disadvantaged groups above national to help close the gap	Review / Implement	Embed	Embed
5.Outward Looking and Growth	5a	To increase the number of schools and pupils within Symphony to ensure we continue our moral duty to provide high quality education to an increasing number of pupils	Review / Implement	Embed	Embed
	5b	Embed Initial Teacher Training in order to develop the next phase of outstanding teachers for the Trust	Embed	Embed	Review / Implement
	5c	Develop and Implement an appropriate professional development curriculum for staff	Embed	Embed	Embed
	5d	Implement Leadership Development programmes to enable staff to progress and to encourage retention within the profession (career pathways)	Review / Implement	Embed	Embed
	5e	Implement School to School Support where needed	Embed	Embed	Embed

Growth of Symphony Learning Trust

Below is an overview of our growth aims and how we intend to grow as a Multi-Academy Trust; SLT Trust overall pupil outcomes from 2018 onwards have been above national average and the Trust is now one of the highest achieving primary MATS in the East Midlands

Aims...

- We want to use our current established practice to widen this success to as many pupils as possible with continually improving outcomes and educational experiences for pupils.
- New centralised roles to develop and grow together with the rate of Trust growth.
- With any school joining Symphony, be it a free-school or an existing school, it is vital to the ethos of Symphony that the curriculum is tailored to each individual school to achieve the success we continue to develop. Each school will have a bespoke curriculum to ensure the needs of pupils in that particular school are fully met. Local knowledge and understanding of every individual school is key to continued success.
- We are an employer of choice; this means providing career opportunities, CPD and pathways to enable our staff to flourish and become educators and leaders of the future.

How...

- The aim of Symphony to grow is clear for the reasons above.
- We have capacity for new leadership within our Trust and continue to place this as of paramount importance. Success stories thus far include five Headteachers who have developed from class teachers within the Trust.
- We currently have Executive Head capacity within the Trust.
- We also have School Business Manager capacity to support new schools coming into the Trust, be they free-schools or existing schools joining the SLT.
- We welcome school leaders into our Trust as key partners; collaborative work is key to future success for each individual school and the SLT.

Quality Assurance Framework – Functions of the Board of Trustees

Functions:

The main functions of the Board of Trustees are to:

1. Strategy and Leadership (*named SLT Trustee – Nigel Harrison*)

- Determine the strategic objectives of the Trust & Academies
- Review the delivery of the strategic objectives of the Trust & Academies

- Review and challenge the progress of the Trust against its strategic objectives and KPIs
- Ensure that the Academies comply with all obligations including the Academies Financial Handbook and the Master Funding Agreement
- Ensure that all academies comply with all regulations affecting the Trust (including all charity law, company law, employment law and health and safety)
- Ensure that there are appropriate financial controls so that there is regularity, probity and value for money in relation to the management of public funds
- Ensure the completion the register of business interests and put in place a procedure to deal with any conflicts of interest and connected party transactions
- Determine the policies and criteria for the selection of Trustees and Governors (helping to ensure that the Trustees and Governors have the skills to run the Trust and the Academies)
- Appoint the Responsible Officer and Audit Committee where necessary
- Appoint the Clerk to the Board
- Review and approve Trust Wide Policies (see the final page of these terms of reference)
- Organise the training programme for trustees

1. Education and Curriculum

(Review the Academy Development/Improvement Plans for each Academy in line with strategic aims (and improvement plan of the Trust)

- Set Key Performance Indicators – setting and reviewing performance of the Trust & the Academies
- Ensuring the appropriate levels of support, challenge and intervention across the trust to support delivery of education outcomes.
- Review and challenge the value for money of the Pupil Premium in terms of educational outcomes and narrowing the achievement gap across all schools in the Trust
- Set the Trust Admissions policy (with variations for adoption by individual Academies)
- In consultation with LGBs, agree Term Dates and length of school day

2. Financial Accountability

- Agree a funding model across the Trust and develop an individual funding model for the Academies so as to secure the Trust's financial health in the short term and the long term
- Formulate and set the Trust wide budget
- Formulate and determine the proportion of Academy budgets to be 'top-sliced' for shared services
- Review financial reports and KPIs
- Follow the agreed scheme of delegation of financial authority given to the Academies
- Establish policies and procedures to ensure compliance with the Trust's financial and reporting requirements
- Approve the annual accounts
- Maintain the Corporate Risk Register
- Agree the investment policy in line with the Academies Financial Handbook and any internal policies and controls

3. Human Resources and Operations

- Appoint CEO as necessary
- Approve, in consultation with the CEO/Exec Heads/LGBs, the appointment of the Head teacher / Head of Schools at each Academy
- Establish Trust wide HR Policies in accordance with all appropriate regulations (see final page of these Terms of Reference)
- Set the Performance Management Policy together with pay reviews (in line with the Trust's pay policy and all statutory regulations)
- Set the Terms and Conditions of Employment and Staff Code of Conduct
- Review Discipline and Grievance policies
- Set trust wide procurement policies (for suppliers including auditors, HR and payroll providers and solicitors) in accordance with the Funding Agreement, Academies Handbook and the Trust's procurement policy
- Determine and allocate central services provided to the Academies by the Trust

- Oversee the effectiveness of services provided centrally by the Trust
- Acquire and dispose of Trust land
- Oversee any changed use of Assets
- Approve insurance arrangements for the Trust
- Oversee public relations activities to project the activities of the Trust and the Academies to the wider community
- Review the Trust Prospectus and website

4. Trustee Commitment

For the board of Trustees to carry out their role effectively, Trustees must be:

- a. Prepared and equipped to take their responsibilities seriously;
 - b. Acknowledged as the accountable body by the Academies;
 - c. Supported by the Academies in that task; and
 - d. Willing and able to monitor and review their own performance;
 - e. Willing and able to enter into appropriate training whether arranged individually or through the Board;
- No Trustee can act on her/his own without proper authority from the Board of Trustees;
 - All Trustees carry equal responsibility for decisions made, and
 - Although appointed through different routes (from a range of different Academies based upon skills), the overriding concern of all Trustees has to be the welfare of the Trust as a whole.

Summary of Top Level Identified Risks

IDENTIFIED RISK	RISK CONTROL
1. Reduced school budgets' impact on the Trust's and its academies' capacity to offer a high quality education.	Develop three year rolling budgets to enable early identification of possible issues Share resources across the Trust and use the bulk buying power of the Trust to reduce costs
2. Failure to recruit or retain sufficient high quality school leaders, teachers or support staff impacts of the Trust's and its academies' ability to achieve high standards and levels of achievement.	Early recruitment to secure best available staff Annual workload survey and response to ensure the Trust and its academies are desirable places to work Build and promote a positive culture within the Trust and its academies to ensure high levels of retention of current staff
3. Impact of low standards or levels of achievement on parental confidence, reputation, pupil numbers or Ofsted grading.	Make the quality of teaching and learning the primary focus of the Trust, its leadership teams and staff Develop and implement a quality assurance programme across the Trust to identify and correct issues at an early stage Invest in the training and development of staff to ensure high quality teaching and learning
4. Lack of succession planning for positions of Chair or Vice Chair of the Trustees, CEO, DCEO, Executive Heads or Heads teachers of the Academies.	Ensure different Trustees are Chairs and Vice Chairs of the Trust's Committees Monitor and promote Trustees' attendance at training events Create bespoke Leadership Development pathways for senior staff with a view to headship and Executive Headship
5. Impact of adverse publicity resulting from inappropriate pupil, staff or trustee activity on parental confidence, reputation, pupil numbers or Ofsted grading.	Ensure suitable policies relating to Pupil Behaviour, Safeguarding and E-Safety are up to date and known Make the quality of teaching and learning the primary focus of the Trust, its leadership teams and staff Develop and implement a quality assurance programme across the Trust to identify and correct issues at an early stage

Capital Strategy

1.0 Introduction

The Symphony Learning Trust currently incorporates fifteen academies located on fifteen sites. The purpose of this Capital Strategy is to summarise the performance of the estate and the issues which are driving change, and lays out proposed development plans. A robust Capital Strategy (as an overall picture of the plans for each Academy) is intended to be used as a practical tool for funding and guiding decisions on key estates issues and external bids. The Estates Lead, together with the CEO, CFO and Finance and Opps Lead, will monitor the estates programme. The strategy will be continuously updated and validated with all parties sufficiently engaged with the strategic development proposals. The strategy will be further developed to include a more operational plan (at individual Academy level) to support its effective implementation.

2.0 SLT Capital Strategy

2.1 Key Objectives

- 2.2.1 To meet current legislation, encompassing health and safety requirements, including the management and mitigation of risk and environmental issues;
- 2.2.2 To optimise use of the teaching and learning facilities;
- 2.2.3 To secure financial funding to support required refurbishments;
- 2.2.4 To ensure equal access across the premises;
- 2.2.5 To ensure adequate maintenance is undertaken through a planned maintenance programme;
- 2.2.6 To consider financial and environmental sustainability, in particular to reduce carbon emissions.

3.0 Estate Information

Estate Strategy

The key strategic objective in relation to estates is to improve and maintain a high quality environment for teaching and learning. The Estates Lead will work on the Symphony Estates Strategy, using SCA Funding, to:

- Ensure the facilities management service level agreements (and the work of Premises Officers and Site Managers) continue to offer a quality service and value for money through annual review and competitive quotation procedures where appropriate;
- Ensure the on-site Estate teams are appropriately trained and managed through a robust appraisal system and succession planning;
- Ensure opportunities for additional capital funding are accessed in a timely manner as they arise;
- Ensure a programme of preventative maintenance is planned and implemented

Financial Strategy

A 'top-slice' will be retained by the MAT based upon each school's current spending on central services* (see below).

The 'Top-Slice' will be calculated as follows:

- If the cost of the service is based upon pupil numbers, schools will be charged per pupil
- If the cost of the service is based upon staff numbers, schools will be charged per staff member
- If the cost of the service is per institution, the school will be charged for their institution

The Business Managers will be responsible for clarifying costs associated with these services, to ensure that efficiencies are secured and provide the Trust with 'value for money'.

Each Academy's budget will be received from the DfE in the General Annual grant and they will use this to set a budget including:

- Any carry-forward at the point of joining
- Pupil Premium
- Devolved Capital (where delegated per school)
- Top-up funding for Special Needs (including Education, Health & Care Plans)
- Any balances
- School generated income (e.g. lettings, fundraising, grants)

Shared Central Services (agreed at a 'Trust' level)

This is not an exhaustive list

- *CEO*
- *CFO*
- *Finance and Opps Lead*
- *Estates Lead*
- *Marketing Lead*
- *Accountants*
- *Heads' Performance Management*
- *HR*
- *Safeguarding*
- *Insurance*
- *Internal Audit*
- *LEAMIS / Capita*
- *Legal*
- *Payroll*

- *National College membership*
- *Health & Safety (Fire, Wiring, PAT Testing – statutory duties)*
- *Hygiene*
- *Licences*
- *Procurement*
- *Recruitment (advertisements)*
- *Initial Teacher Training*
- *School Improvement*
- *Shared bid writing*
- *Staff CPD (Training)*