



MAT CONTRIBUTION POLICY

Adopted by the Trust Board: Oct 2025

Review: Autumn 2026



Updates since last edition

Number section	Title section	Details of changes
	MAT Central Services Contribution	School GAG contribution changed from 8% to 8.5%
	Finance	Removed ESFA



STRICTLY CONFIDENTIAL

MAT Contribution Policy

The Academy Trust 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 Academy Trust 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 percentage of income revenue to be contributed to the management and running costs of central services. The current contribution for the financial year 2025/2026, is 8.5% of each schools GAG funding allocation.

The contribution for new schools joining the trust will be agreed separately in the first instance, depending on their financial situation at the time of joining, but with a view to meeting the 8.5% contribution level at an agreed point in the future.

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 expected to work towards an in-year surplus budget. All reserves are held centrally for the benefit of the entire trust.

The contribution will be used to fund the following expenditure on behalf of academies with the Trust. The list includes but is not limited to:



Central services staff remuneration

Governance

- Scheme of Delegation & Terms of Reference
- Policies
- Governance Plan
- Training
- Membership of The Key for School Governors
- Partnership Working and Support
- Attendance at Academy Committee Meetings
- 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

- Moderation
- Data Analysis

Staff Development

- Continuing professional and leadership development
- Leadership Academy
- School to School Support

Human Resources (HR)

- Recruitment and pre-employment requirements
- Offer support and guidance with any HR query, signposting to the relevant legislation and recommendations. (Additional charges may be incurred at school level)
- Policy review
- Capability issue support
- Disciplinary issue support. (Additional charges may be incurred at school level)
- Maternity and Paternity advice
- HR Risk Assessments
- Occupational Health referrals
- Liaison with union representatives

Payroll

- Administration of payroll
- Liaising with HMRC on behalf of the employer



- Managing and checking third party payments
- 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
- 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
- IR35 guidance
- Land and Buildings Collection Tool Return
- School Resource Management self-assessment tool
- Regular finance and admin meeting with Office Managers and Finance Manager/Finance Team
- 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 (e.g., 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 through the Trust's legal advisors, Stone King. (Additional charges may be incurred at school level)
- GDPR support. (Additional charges may be incurred at school level)

Estate Management

- Compliance Monitoring
- Risk Assessment Support
- Policies Templates and Guidance
- Critical Incident Management Plan Support
- Business Continuity Plan Support
- Condition Improvement Fund (CIF) Assistance & Guidance
- Asset Management Plan Support
- Fire Safety Management Support
- Termly Meetings for Premises Staff/Headteachers
- Trust-wide caretaker support (as an additional cost)

The South Essex Academy 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.