

LIFE Multi-Academy Trust

Constitution and Terms of Reference of Trust Local Governing Bodies and LiFE Scheme of Delegation

OVERVIEW

The Local Governing Bodies (LGBs) are Committees of the LiFE Trust Board.

They are authorised to act within their delegated powers granted to them by the Trust Board within the wider Trust Scheme of Delegation, which as required by ESFA is reviewed and approved annually by the Trust Board.

These Terms of Reference and supporting appendix were agreed by the Trust Board on the 3rd July, 2023.

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1. PURPOSE OF LOCAL GOVERNING BODIES (LGB)

The Trust Board is legally accountable for the performance of each Academy. The Board requires the active support of LGBs to provide assurance of effective governance at individual Academy level and to oversee and hold their schools to account for educational performance.

LGBs in LiFE make some decisions as outlined in the Scheme of Delegation in the second part of this document but in the main the trust Board is the accountable body. LGBs are not responsible for operational matters or direction of the Headteacher.

LGBs are responsible for holding the Headteacher and senior leadership of the school to account and for providing assurance to the Trust Board. They also support the head and executive team of their school to undertake their local leadership role as well as acting as a group to reflect the needs and views of the local community in which their school operates. It is important that LGBs understand and agree with the values and mission of LiFE Multi Academy Trust.

The purpose and expectation of the LGB is therefore, within the scope of delegations approved by the Trust Board from time to time, to:

1. Provide assurance to the Board that the quality of education, academy improvement and strategic direction of their Academy are consistent with the educational objectives of the Trust, the agreed School Improvement Plan (SIP) and the Vision and ethos of the Trust;
2. Hold school leaders to account for the quality of education and the educational performance of their school; and
3. Establish a termly view of the quality of education at the Academy and of the effectiveness of the educational performance and (via the minutes of termly meetings) report this to the Trust Board, drawing attention of Trustees to any concerns or emerging trends in relation to which Governors have concerns or consider they have not received a satisfactory response.
4. Develop mechanisms and processes to take the views of stakeholders into account for their school in the context of the vision and values of the trust as a whole.

Other responsibilities of the LGBs are:

- a. providing understanding of the local context and the challenges and opportunities this presents

- b. acting as a sounding board for the school’s leadership team by providing support and challenge to the school’s leadership team
- c. having an awareness of school standards and performance
- d. having an awareness of the school’s finances and monitoring spending against the agreed budget
- e. having awareness of how the school supports the welfare of looked after children, and provision for children with Special Educational Needs and Disabilities
- f. providing members for pupil and staff disciplinary panels and complaints hearing
- g. building and maintaining positive local perceptions of the school
- h. building and maintaining relationships with the local and regional business community
- i. building and maintaining relationships with community partners (e.g. health services, police, social services, religious organisations) and identify potential sources of financial support from the school community and support school leaders to access these

2. CONSTITUTION AND MEMBERSHIP

Local Governing Bodies shall comprise:

- a. two elected Parent Governors (in extremis, if there are fewer candidates than vacancies, parent governors may be appointed by the LGB but the LGB will use its best endeavours to hold elections);
- b. a maximum of six Community Governors subject to a minimum of 4. (Community Governors are people appointed by the LGB. Community Governors may include parents of children at the school and ideally should be identified from those organisations with whom the school has partnerships or close relationships);
- c. the Head Teacher (ex – officio);
- d. two Staff Members (one member of teaching staff and one member of support staff). *see note a*

Permitted Minimum Governors : 9

Permitted Maximum Governors : 11 *see note b*

NOTES

- a. In circumstances where the LGB is unable to recruit from one of those groups of Staff then the opportunity may be opened to the whole Staff group but the term of office will be for a period of 2 years at which point the position will be reviewed. In these circumstances a request may be made to the Head of Governance for a temporary variation to the Constitution.*

- b. Where an LGB considers that the total number of Parent or Community Governors should be varied to accommodate additional skills or to improve the effectiveness of the LGB, subject to the formal approval of the LGB of the case in support of this, a request may be made to the Head of Governance for a temporary variation to the Constitution.*

Associate Members - LGB's may appoint Associate Members, please note these roles are **NOT** Governor roles. Associate members must not be seen as a means of 'adding' people to the governing body: the role of Associate Governor does not exist. A Governing Body can however appoint an Associate Member if there is a genuine need for their skillset and/or experience. The role can also be used to introduce prospective Governors to the workings of the Governing Body as it gives the individual first hand experience of how their skills will be applied and allows other Governors to determine whether the individual has the necessary skills to be appointed as a full Governor. Provided they are appointed correctly and their remit is fully understood, Associate Members can be a valuable addition to a governing body. They can be useful if a Governing Body has identified a skills gap and is unable to fill this with a serving Governor or the skillset is only required for a specific period of time. Where a governing body wishes to appoint an Associate Member(s) a request may be made to the Head of Governance.

Quorum

Any three governors will constitute a quorum, provided always, that non-Staff Governors form the majority of those present.

Frequency of Meetings

Meetings will be held twice each term (six per academic year). Additional meetings may be arranged if required. The dates of the Trust Board meeting will be shared with the LGB's during the Spring Term. The LGB's will then set their dates during the Summer Term (This is to ensure that LGB meeting dates do not clash). The Governance Team will add all dates to the [Calendar](#) annually which is available on the Resources area of Governor Hub.

Attendance

The Headteacher will normally attend all formal meetings of the LGB.

At the discretion of the Chair, other members of staff (non LGB members) may attend and may participate in/present to the meeting. The Chief Executive, Chief Finance and Head of Governance and any Trustee may attend and report to any LGB meeting. The LGB Governance Professional will be present throughout all meetings.

Meetings may be organised face to face or virtually (ie “on-line”) or in a hybrid format with some attendees meeting in person and others on-line. School/Trust Staff and the Governance Professional should use their best endeavours to ensure meetings are accessible to all governors.

Should a governor not attend a meeting during a six month period the LGB may, at its discretion, resolve to remove a governor .

3. AUTHORITY AND DETAILED DELEGATED FUNCTIONS

The Trust Board reserves the right to vary or withdraw any delegation to any LGB where Trustees consider that it is in the best interests of the education of students or the management, governance or resource allocation of the Trust or an individual Academy to do so. It should be stressed that such an action would be deemed highly unusual.

In some extreme circumstances, the Trust Board with advice from the CEO, has the right to disband an LGB that fails to serve the school in the appropriate manner.

Subject to the above, the role and responsibility of the LGB is to provide assurance to the Trust Board that the quality of education and academy improvement are consistent with the educational objectives and Vision of the Trust. Specifically:

School Performance and Improvement

The Headteacher is responsible for school performance and improvement and is accountable to the Chief Executive, Trust Board and LGB.

Governors are asked to focus oversight and challenge on, and to seek evidence of the quality of education at their school, especially:

- a. oversee the Curriculum, its intent, implementation and impact, in line with the Curriculum principles of our Trust
- b. provide constructive challenge to the Headteacher and Academy leadership to account for and evidence actions and outcomes reported to them;
- c. understand and review progress in relation to Academy improvement targets (the School Strategic Wheel), attainment and progress data and the comparison of these with outcomes elsewhere within the Trust and locally and nationally;
- d. understand the issues facing the school, the parents and carers of children attending the school and the local community; and

- e. seek assurance, and satisfy themselves that appropriate and timely actions are being taken to deliver high quality education and academy improvement targets in addition to adherence to and delivery of the values, vision and ethos of the Trust, in a manner appropriate to the specific qualities and community characteristics of their Academy.

The LGB is also required to take oversight, provide assurance to the Board and hold the Headteacher to account for:

Safeguarding, SEND and other vulnerable groups

For this purpose, the LGB will appoint a lead Governor(s) (i.e. a Named Governor(s)) with responsibility for oversight and assurance to the LGB as to the effectiveness of safeguarding in the school, the effectiveness of the SEND offer and the quality of education and performance of children in these groups). Training and a description for this role will be provided.

Pupils and Community

The Trust relies on LGBs to be its “ears and eyes” for the communities it provides for, as set out in item 4 of their purpose. The LGB is required to undertake annual surveys, or other means, to ensure they are aware of the views and needs of the pupils, parents and wider community that they serve.

Risk Management

Maintenance and accuracy of the school Risk Register including, through regular review, that risks, risk scores and risk mitigations remain relevant.

Finance

Management of the school budget is an operational matter. The Headteacher will present a termly financial report (usually the most recent budget update agreed with the Trust Finance Team) and will explain significant variations to the original approved budget.

The LGB is required to seek termly assurance and to satisfy itself that the school budget is on track and that financial resources are being used as intended. The annual budget is agreed by the Trust Board. Governors do not make expenditure decisions and do not have authority to approve the budget or to change any aspect of the budget. (The Headteacher is required to comply with the Financial Regulations agreed by the Trust Board).

Complaints

All complaints must be dealt with strictly in accordance with the Trust Complaints Policy and procedure. Governors receiving a complaint will, in the first instance, refer the matter to the Headteacher (or to the Chair of the LGB if the complaint is about the headteacher).

Lead Governors

In addition to lead governor(s) for safeguarding, SEND and other vulnerable groups, the LGB is required to appoint a governor as the lead for each “spoke” of the Strategic Wheel, Pupil Premium and for Governor Training. The LGB may appoint lead governors for other issues. This may require some governors to ‘lead’ on more than one strategic area. The role of all lead governors must be agreed between the LGB Chair and Head of Governance in order to ensure that the role does not encroach onto the operational/delegated authority of the Head. Role descriptions for each lead governor, once agreed in principle with the trust, will be designed to meet the requirements of each school at the discretion of the LGB.

People and Personnel Issues

People and Staffing matters are operational issues for which the Headteacher is wholly responsible and accountable to the Executive. Governors may however be called upon to participate in staff-related Panels – see below. The Headteacher will include in the termly report, for information only, relevant staffing developments. This will include arrangements for teaching.

Policies

There are three categories of Trust Policies (Schedule – Appendix A). With the exception of Category 3 Policies, all Trust Policies must be agreed and/or reviewed in accordance with the Scheme of Delegation (Policies). In terms of Category 3 policies the LGB/School are expected to ensure that the policies reflect current guidance/legislation and are reviewed at regular intervals.

The Policy categories are:

Category 1: Trust Wide Policies for which implementation and operational decisions are delegated to the Executive. Any change to Policy must be approved by the Trust Board. These policies will be reported to the LGB for information. LGBs may be consulted on such trust wide policies as appropriate.

Category 2: Trust wide Policies that may be varied by individual schools. The scope for variation of Policy is limited according to agreed guidelines. The local variations are subject to approval by the LGB. Implementation and operational decisions relating to these policies is delegated to the Executive.

Category 3: these Policies relate to individual academies only and are subject to LGB approval. The local context of a school in the trust may require LGBs to develop school policies that are specific to that school above and beyond those school policies contained in the list of Category 3 policies above.

All policies are available on the [Policies](#) area of Governor Hub.

Governor Panels

All Governors may be called upon, subject to training, to serve on Trust Governor Panels relating to:

Staff Grievances

Staff Disciplinary Appeals

Pupil Exclusions Complaints

This list is not exhaustive and full training will be provided. Associate Member may also sit on Governor Panels, but the majority of the members must be Governors.

Scheme of Delegation

The key delegated responsibilities are described in more detail earlier in this document. They are summarised here for ease of reference:

- a. supporting the Trust's strategy and development plan
- b. providing understanding of the local context and the challenges and opportunities this presents
- c. acting as a sounding board for the school's leadership team by providing support and challenge to the school's leadership team
- d. having an awareness of school standards and performance
- e. having an awareness of the school's finances and monitoring spending against the agreed budget
- f. having awareness of how the school supports the welfare of looked after children, and provision for children with Special Educational Needs and Disabilities
- g. providing members for pupil and staff disciplinary panels and complaints hearing
- h. building and maintaining positive local perceptions of the school
- i. building and maintaining relationships with the local and regional business community

- j. building and maintaining relationships with community partners (e.g. health services, police, social services, religious organisations) and identify potential sources of financial support from the school community and support school leaders to access these

In extreme circumstances, the Board of Trustees has the right to disband an LGB that fails to serve the school in the appropriate manner. In less extreme circumstances the Board may temporarily remove some delegations from the LGB. This should be seen as a provision of support and is not meant to be punitive.

This Scheme of Delegation is structured in accordance with the functions -

- a. **Governance**
- b. **Strategy and Quality**
- c. **School Improvement**
- d. **Human Resources**
- e. **Estates and Technology**
- f. **Finance**
- g. **Community Engagement**

The Trust Board is accountable for ensuring all the following actions are taken.

Under each function the role of each level of governance is identified using the key:

E = Executive

LGB = Local Governing Body

HT = Headteacher (or Exec Headteacher)*

(*Where a school has an Executive Headteacher, a local agreement will be made that clarifies the arrangements and responsibilities between the Headteacher and Executive Headteacher. These arrangements will be reviewed annually)

Each of these roles accept the following functions –

DELIVERS

Those responsible for delivering the task, they ensure that it is done.

SUPPORTIVE

Those who provide support to those responsible for delivering the task.

CONSULTED

Those whose opinions are sought, and with whom there is two-way communication.

INFORMED

Those who are kept up to date on progress and key information.

GOVERNANCE		E	LGB	HT
1	Create and update governance documentation	D	I	I
2	Appoint (and remove) the chair of the LGB. The appointment process will normally be that the LGB recommends a Chair to the Board and the Board ratifies the appointment.	D	C	C
3	Appoint and dismiss the Governance Professional to the LGB	D	C	I
4	Hold a full LGB meeting at least two meetings a term, usually six times per academic year, Headteacher/Governance Professional to ensure all papers are available at least seven working days prior to the meeting.	I	D	S
5	Approve the appointment of members of the LGB	C	D	C
6	Actively seek LGB members	S	D	S
7	Remove members of the LGB other than the chair	S	D	C
8	Determine LGB members' development needs and put in place an appropriate programme	S	D	S

9	Produce and update statutory and best practice Trust policies	D	C	C
10	Implement Trust policies	D	S	D
11	Produce and update School policies	S	S	D
12	To complete on an annual basis the Board Self Evaluation, Chair 360 review and Skills Audit's	S	D	S

STRATEGY AND QUALITY (LEADERSHIP)		E	LGB	HT
13	Develop Trust vision, values and ethos	D	C	S
14	Ensure school vision, values and ethos matches those of the trust as a whole	S	D	D
15	Review annually the trust's strategic planning wheel	D	C	S
16	Review annually the school's strategic planning wheel	C	S	D
STRATEGY AND QUALITY (SERVICES)		E	LGB	HT
17	Determine the scope of central services to be delivered by LiFE centre to schools	D	I	C
18	Identify additional services to be procured on behalf of schools			
19	Ensure centrally delivered and procured services provide value for money			
20	Ensure centrally delivered and procured services provide value for money			
STRATEGY AND QUALITY (COMPLIANCE)		E	LGB	HT

21	Set the timing of the school day and the dates of school terms and holidays	D	C	D
22	Consider requests from other schools to join the Trust	D	I	I
23	Setting/amending an admissions policy for the school	D	I	S
24	Admissions application decisions for individual in year, over PAN and deferred admission	D	I	S
25	If appropriate, appeal against LA directions to admit pupil(s)	S	C	D
26	Publish proposals to change category of school	D	C	S
27	Prepare and publish the school prospectus	S	I	D
28	Ensure school website is fully compliant	S	I	D
SCHOOL IMPROVEMENT		E	LGB	HT
29	Propose targets for pupil achievement	S	C	D
30	Approve targets for pupil achievement	D	I	C
31	Establish and update the Trust behaviour policy	D	I	C
32	Establish the school behaviour policy	S	C	D
33	Review school-level exclusions data	D	C	S
34	Carry out a review of the Headteacher's decision to issue an exclusion or suspension of a pupil within the following thresholds - it is a permanent exclusion; it is a suspension which would bring the pupil's total number of school days out of school to more than 15 in a term; or it would result in the pupil missing a public examination or national curriculum test; suspension of less than five days where a Parent makes formal representations or a suspension between more than five but less than 16 school days in a term where a Parent makes formal representations.	S	D	I

35	Produce the School Development Plan	S	C	D
36	Approve the School Development Plan	D	I	S
37	Compile post-inspection action plans and RAPs (raising attainment plans)	S	I	D
38	Create and update the Trust safeguarding policy	D	I	C
39	Implement the Trust safeguarding policy	S	S	D
40	Put in place and monitor any additional educational support services	S	I	D
41	Maintain accurate, effective and secure pupil records	S	I	D
42	Set Trust-wide monitoring and evaluation cycle of schools	D	I	C
43	Set schools' internal monitoring and evaluation cycles	S	S	D
44	Comply with all Data Protection legislation and good practice	D	D	D
45	Collate data for pupil assessment and other returns	S	I	D
46	Develop a school curriculum policy, within the principles of our Trust	S	C	D
47	Develop and implement Trust curriculum vision and strategy	D	I	D
48	Implement the school curriculum policy, within Trust guidelines	I	S	D
49	Prevent radicalisation, promote equality, diversity and tolerance and KPC ensure the balanced treatment of political issues	S	S	D
50	Ensure provision of Religious Education in line with statutory requirements	S	S	D
51	Ensure that all pupils take part in a daily act of collective worship	S	S	D

52	Discharge duties in respect of pupils with special educational needs and disabilities	S	S	D
53	Ensure high-quality educational experiences and outcomes	S	I	D
54	Ensure Real LiFE Curriculum is delivered as appropriate	S	C	D
55	Ensure provision of free school meals to those pupils meeting the criteria	I	S	D
56	Determine and evaluate use of Pupil Premium funding	S	C	D
57	Develop and implement a compliant sex and relationships education policy at school level	I	C	D

HUMAN RESOURCES		E	LGB	HT
58	Draft and update all employee contracts and HR policies	D	I	C
59	Appoint the Headteacher	D	C	I
60	Dismiss or suspend the Headteacher	D	I	I

61	Appoint the Deputy Headteacher	S	C	D
62	Dismiss or suspend the Deputy Headteacher	C	I	D
63	Appoint, dismiss or suspend all other school staff, following Trust policies and procedures	S	S	D
64	Ensure that an approved appraisal policy is in place	D	I	C
65	Conduct the appraisal of the Headteacher	D	S	C

66	Approval of pay awards for headteachers, where applicable	C	I	I
67	Conduct the appraisal of all school staff	C	I	D
68	*The Executive Headteacher/Headteacher will inform the LGB or a committee of the LGB who may operate a process of post-decision scrutiny so any improvements or standardisation they identify can be captured for the subsequent years process.	D	I/C*	S
69	Formulate Staff Handbook	D	C	S
70	Determine staff complement within agreed budget	C	C	D
71	Determine settlement payment/early retirement Headteacher	D	C	I
72	Determine dismissal payment/early retirement of all other staff	S	I	D
73	Monitor (definition of monitor in hyperlink)and support the wellbeing of all staff including through staff surveys	D	I	D
ESTATES AND TECHNOLOGY: ESTATES		E	LGB	HT
74	Create and update the Trust health and safety policy	D	I	S
75	Implement the schools section of the health and safety policy	S	I	D
76	Ensure appropriate insurance for buildings, contents and other liabilities	D	I	C
77	Develop school buildings and facilities estate long-term strategy or master plan	D	C	S

78	Produce and maintain buildings, including developing properly funded maintenance plan	S	I	D
79	Ensure that health and safety regulations are followed	S	S	D
80	Manage the school premises and ensure security	S	I	D
ESTATES AND TECHNOLOGY: TECHNOLOGY		E	LGB	HT
81	Produce and update the Trust IT strategy, setting minimum requirements for digital systems including security and back-up	D	I	C
82	Formulate the school IT strategy within the framework set by the Trust IT strategy	S	I	D
FINANCE		E	LGB	HT
83	Develop and propose the individual school budget	S	C	D
84	Approve school level budget	D	I	S
85	Approve the formal Trust budget plan each financial year and submit to the ESFA	D	I	C
86	Plan, manage and monitor monthly expenditure and financial reports, and identify actual or potential items of budget overspend/underspend (see Appendix B)	S	S	D
87	Approve any variations to budget and/or likely budget overspends within LiFE	D	I	C
88	Establish financial decision levels and limits	D	I	I

89	Establish a charging and remissions policy for the school	D	I	S
90	Appoint the internal auditor for the school	D	I	I
91	Produce and update the LiFE Financial Handbook	D	I	C
92	Abide by the financial limits and authorisation levels set within the LiFE Financial Handbook	D	I	D
93	Appoint internal and external auditors	S	I	I
94	Monitor compliance with approved financial procedures (see Appendix B)	D	I	S
95	Develop risk management strategies	D	S	S
96	Decide how to use Pupil Premium funding	S	C	D

APPENDIX A: POLICIES

CATEGORY 1 & 2

Accessibility Plan Policy

Admissions Policy

Anti Fraud, Corruption, Bribery & Related Party Transaction Policy

Anti Harassment & Bullying

Appraisal & Capability

Attendance, Sickness & Medical Capability

Behaviour in Schools

Capital Allocation Policy

CCTV System Policy

Charges and Remissions

Code of Conduct (Staff)

Complaints - 3rd Party

Complaints - Parents

Data protection/GDPR

Declarations of Interest Policy (Trustees & Governors)

Discipline, conduct and grievance (procedures for addressing)

Discipline, conduct and grievance (procedures for addressing) APPEALS

Donations Policy & Procedures, 2022

Early career teachers (ECTs)

Equality & Diversity

Equality information and objectives (public sector equality duty) statement for publication & Policy

Equality Policy, 2022 - 2023

Finance Policy

Flexible Working

Funds Policy 2022

Gifts and Hospitality Policy

Guidance on consulting Staff & Unions

Health and Safety Policy

Homeworking

LAC & PLAC Policy

Leave of Absence

Managing Stress & Wellbeing at Work

Maternity, paternity, adoption, parental and shared parental leave policy

Menopause

Organisational Change

Parental Bereavement Leave Policy

Pay Policy - All Staff

Performance Management

Probation Policy

Records Management and Retention Policy

Recruitment & Selection

References

Register of business interests of headteachers and any member of staff with influence over financial decisions

Restructuring/ Reorganisation

Risk Management Policy 2023

Statement of procedures for dealing with allegations of abuse against staff

TOiL and Extra-hours

Top Slice Statement & Appeals Procedure

Trustee & Governor Visit Policy

Trustee Code of Conduct

Whistle Blowing Policy

Young Carers

CATEGORY 3 - POLICIES

Asbestos Management Plan and Record of ACM's

Children with health needs who cannot attend school

Curriculum Policy

Designated teacher for looked-after and previously looked-after children

Home School Agreement

Home Visit Policy and Risk Assessment

Homework Policy

Intimate Care

KiT days

PPA

Reading Policy

Register of pupils' admission to school and attendance

Relationships education (primary) and relationships and sex education (secondary)

Remote Learning Policy

Reporting to Parents Policy

Rewards & Awards Policy

Risk Register

School Trips & Visits

Spiritual Moral Social & Cultural

Supporting pupils with medical conditions

Swimming Pool NOP & EAP

Teaching & Learning Policy

Uniform Policy

Use of Premises Guidance

APPENDIX B: BUDGET MONITORING GUIDE FOR GOVERNORS

Budget monitoring reports prepared for governing boards should be clear, concise and easy to understand. They should also provide boards with an opportunity to raise questions, concerns and respond decisively to changes in the budget. - National Governors Association

When does the academy's financial year run from and to?

The academy's financial year runs from 1st September to 31st August.

What is a financial period?

The financial year is split into 12 periods please see below a grid showing the timing of the periods and the relevant % in each period:

Period	P1	P2	P3	P4	P5	P6	P7	P8	P9	P10	P11	P12
Month	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
%	8%	16.6%	25%	33.3%	41.6%	50%	58.3%	66.6%	75%	83.35	91.6	100%

How is the academy's income calculated?

The General Annual Grant (GAG) is the main source of funding for each academy. The information used to calculate the funding of each academy is generally taken from the school census.

Schools submit a census 3 times a year:

- October
- January
- May

The October census is crucial and its accuracy is critical to ensure each school receives the correct funding for the next academic year.

Other forms of income that are generated through the schools census include:

- Pupil Premium
- Free School Meals
- Universal Free School Meals (Primary only)

- Mainstream School Additional Grant (MSAG)
- Teachers Pay Grant
- Early Years Funding
- Recover Premium
- National Tutoring Programme
- PE Grant (Primary only)

As a governor what do I need to be looking for when I monitor the academy's budget?

You should be able to see in the information provided:

- The profiled budget
- Spend to date
- End-of-year projections

If this information is not available ask the Headteacher why

Income

Check that the GAG income and other DfE grant matches the period % identified above ie in November's monitoring report (period 3) we should have received 25%. If this figure is different, a question should be raised with the Headteacher.

Expenditure

Check that the salary spent to date matches the relevant accounting period. There may be small variances for seasonally appointed staff (i.e. invigilators). Salary costs account for the largest proportion of budgetary spend.

The percentage spent on other expenditure will vary depending on the time of year. For example exam fees are generally spent in spring term for summer exam entries, utility bills will alter depending on the time of year, curriculum spend is dependent on the demands of the curriculum during the year etc.

When does an academy receive its GAG statement for the following year?

GAG statements are generally received in February/March for the following academic year.

When does the budget planning process start?

Budget planning can generally start following submission of the October census.

How do I access the budget monitoring reports?

Monthly reports are uploaded onto Governor Hub and can be found in your individual schools areas.

When can I expect to see an updated budget report?

The finance team closes each period on the 15th day of the month. Therefore, if you want to look at the report for January it will be available after the 15th February (there may be times in the year when these reports are delayed due to periods of closure i.e. christmas).