

Pooling Policy



Education is for improving lives and for leaving your community and world better than you found it.

Approved by the Board of Directors on: 11 December 2019

Review date: December 2021

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1. Introduction

Under the provisions in the Academies Financial Handbook, Community Academies Trust (CAT) Board of Directors are able to amalgamate a proportion of General Annual Grant (GAG) funding for all its academies to form one central fund. This fund can then be used to meet the normal running costs at any of its constituent academies within the trust. This is known as pooling.

This Policy allows the trust to operate pooling in the following limited circumstances:

- to enable schools within the trust which share a Local Governing Body (LGB) or Education Advisory Board (EAB) to adjust the allocated GAG budget between the schools on an annual basis.
- To pool the Teachers Pension Employer Contribution Grant across our schools to ensure an even distribution according to need.

2. Schools with shared governance

- This part of the Policy only applies to schools within the trust that share a single governing body (LGB or EAB).
- The governing body may request that the Board allow the schools operated by the governing body to transfer a GAG budget from one school to another.
- The request **must** be formally approved and minuted at the meeting of the governing body in the summer term when the governing body proposes the school budgets for the following academic year and must go forward to the Board of Directors along with the school budgets.
- The Board of Directors **must** approve or reject the request at the meeting in the summer term when the trust budget is approved for the following year. The outcome of the board meeting will be reported to the governing body as soon as is practical after the meeting.
- If pooling is approved an amount of GAG will be transferred between schools operated by the governing body to create a budget for the academic year on the trust's finance system.
- No further transfers between schools will be made after the budgets are set.
- Reported reserves remain with the schools and reserves cannot be pooled.
- The headteacher or executive headteacher of an affected school has the right to appeal directly to the Board of Directors in writing if they feel their school has been treated unfairly by the proposed pooling. Such an appeal will be considered alongside the proposed pooling.
- Should the headteacher or executive headteacher still feel their school has been unfairly treated by the CAT Board of Directors they have the right to appeal directly to the Secretary of State. The decision of the Secretary of State is final.

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3. Teachers Pension Employers Contribution Grant (TPECG)

- This part of the Policy applies to all schools within the trust, including operational units such as CAT Teaching School and the central team.
- The grant being pooled is the Teachers Pension Employers Contribution Grant including any supplementary fund elements that are receivable by the trust.
- The Executive Director Finance and Operations will propose to the Accounting Officer annually a fair distribution of the TPECG that reflects the funding needs and allocations of each school and operational unit within the trust that employs teachers.
- The Accounting Officer will assess the proposal and either agree it or modify it to better reflect the needs of our schools and operational units.
- This allocation will be made directly to schools through the finance system and communicated to headteachers.
- The headteacher or executive headteacher of any affected school has the right to appeal directly to the Board of Directors in writing if they feel their school has been treated unfairly by the proposed pooling. If this happens the Board of Directors will consider the fairness of the allocation in light of the ESFA rules on pooling at their next meeting.
- Should the headteacher or executive headteacher still feel their school has been unfairly treated by the Board of Directors they have the right to appeal directly to the Secretary of State. The decision of the Secretary of State is final.

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