



Funding and Appeals Policy

Policy Code:	F15
Policy Start Date:	September 2025
Policy Review Date:	September 2026
Approved by	Finance & Estates Committee

1.Statement

- 1.1 Community Inclusive Trust (CIT) General Annual Grant (GAG) pools in line with the following:

The Academies Trust Handbook, 2025 states in section 5.29 and 5.330 that:

“The ability to amalgamate and direct funds to meet improvement priorities and need across the trust’s schools can be integral to a trust’s successful financial operating model. A trust with multiple academies can amalgamate GAG for its academies to form one central fund. This practice can enhance a trust’s ability to allocate resources in line with improvement priorities and running costs across the trust’s constituent academies.

If a trust decides to pool GAG, it **must** consider the funding needs and allocations of each constituent academy. The trust **must** have an appeals mechanism and an appeal can be escalated to DfE, if not resolved. DfE’s decision will be final and can result in the pooling provisions being dis-applied. A trust **must not** pool Private Finance Initiative (PFI) funding, in accordance with its funding agreement.”

- 1.2 For CIT reserves information, please refer to the Trust Reserves Policy. Reserves are monitored and drawn upon in line with this policy.

- 1.3 Funds are retained by the Trust to cover the following expenditure:

- School improvement
- Capital projects
- Trust-wide improvements and growth
- External audit fees
- Internal audit fees
- Financial management
- HR support
- ICT support and infrastructure
- GDPR controls
- Payroll costs
- Governance, legal and professional costs
- Bank charges
- Central services staffing costs and resourcing
- Communications, websites and fundraising
- Economies of scale/value for money in the procurement of utilities and services

The above list is not exhaustive and will be reviewed annually by the Trust Board.

- 1.6 On the recommendation of CIT’s Executive Leadership team (ELT), a cost for the services maintained, performed and operated by the Trust Support Hub is presented to the Trust Board’s Finance and Estates Committee with a clear rationale as part of the approval of the overall Trust budget. Details of this are provided to each academy as part of the budget setting rationale ahead of each academy preparing their individual budgets as a Central apportionment charge.

2. Appeals

- 2.1 The Academies Trust Handbook states: “If a trust decides to pool GAG, it must consider the funding needs and allocations of each constituent academy. The trust must have an appeals mechanism and an appeal can be escalated to DfE, if not resolved. DfE’s

decision will be final and can result in the pooling provisions being disapplied.” (Section 5.30).

- 2.2 Prior to any appeal being heard by the Trust Board, CIT has a two-step process that must be followed:
- If an individual academy feels that they have insufficient resource to meet educational care or safeguarding needs within their setting, they are first to discuss this with the relevant Director of Education (these conversations will take place at initial budget setting and throughout the year in line with the regular budget meetings with the Chief Finance and Operations Officer (CFOO)).
 - If a mutually agreeable solution regarding resourcing is not achieved, a business case would need to be put to CIT’s Executive Leadership Team for consideration. The Executive Leadership Team would have to respond in writing with their decision and rationale for this. (The ELT will consider and provide a rationale for their decision within ten school working days of a business case being presented to the ELT).
- 2.3 In line with the Academies Trust Handbook, if the Head Teacher/Principal still feels they have insufficient resource to meet the needs of their school they should write to the Clerk to the Trust Board requesting a review of their resourcing. The Clerk will collate information and representations from the Head Teacher and the CEO to be presented to a panel selected by the Chair of the Trust to review and ultimately make a decision on the fairness of the resourcing. (The Clerk to the Trust Board will convene an appeals committee within ten working days of a Head Teacher requesting the ELT decision to be reviewed).
- 2.4 In line with the Trust’s values of trust and respect, if a Head Teacher still feels that they are not receiving fair resourcing to meet the needs of their pupils and their school, we appreciate they are within their rights to escalate this as per the Academies Trust Handbook section 5.30. If they wish to do so, they are requested to inform the CEO in writing that they are pursuing this course of action.