

Multi academy trust (MAT) or sponsor template

Application approved	
Lead Regional Director Region	
Regions Group Coordinator/Lead	

Full Name of proposed MAT/Sponsor / existing MAT/Sponsor / or sponsor MAT	
Date:	
Author:	
MAT number/Sponsor ID:	
Cleared by:	

Type	
Open	
Pipeline	
Pre-pipeline	
Any academies in process of transferring?	
Current footprint	
Capacity beyond open and pipeline if available/required.	
Is this a Diocesan MAT?	
If yes, % of schools that are G or O?	

MAT or sponsor overview

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Risks and issues

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Key people

Chief Executive Officer:	
Chief Operating Officer:	
Finance Director:	
HR lead:	
Any others:	

Governance and trust board – structures and accountability framework

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School improvement strategy

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Financial and resource management

Has the MAT/Sponsor received TSI/TEG/TCAF or other funding?	
How much, when and what it was for?	

Integrated Curriculum Financial Planning (ICFP) information:

Future plans

Financial health

Basic Regions Group financial health assessment

Trust name:	
Date completed:	
Template completed by:	
Approved by:	

	Actuals - Financial Statements: 2020/21	Actuals - Financial Statements: 2021/22	Forecast Finances 2022: 2022/23	Forecast Finances 2022: 2023/24	Forecast Finances 2022: 2024/25
Total Revenue Income					
In-year surplus/deficit					
Carried forward surplus/deficit					
Carried forward as % of total income					

Is the trust in ESFA intervention?	Yes/No	
Has the trust received a Notice to Improve?	Yes/No	
Are there any other concerns relevant for Advisory Board to consider?	Yes/No	
Forecasted staff expenditure as % of income		
Has the trust had a Schools Resource management Advisor (SRMA) deployment? If yes, when was this?	Yes/No When?	
Has the trust conducted an External Review of Governance? If yes, when?	Yes/No When?	
Does the trust charge a top slice?	Yes/No	

Delivery Officer assessment of the trust/sponsor

Other views from SFSO/ESFA on financial issues at the trust

Trust or sponsor performance data (updated KS1/Phonics/KS2/KS4/KS5 tables)

KS1 Table

Attainment	2022 Nat avg. (%) - KS1 % expected standard in reading, writing and maths	2019 Nat avg. (%) - KS1 % expected standard in reading, writing and maths	2018 Nat avg. (%) - KS1 % expected standard in reading, writing and maths
Reading			
Writing			
Maths			

Phonics

	2022 Nat avg. (%) - % of pupils meeting the expected standard in the phonics screening check in year 1	2019 Nat avg. (%) - % of pupils meeting the expected standard in the phonics screening check in year 1	2018 Nat avg. (%) - % of pupils meeting the expected standard in the phonics screening check in year 1
Phonics			

KS2 tables

	% meeting expected std in RWM (PP) - 2022	% meeting expected std in RWM (PP) - 2019	% meeting expected std in RWM - 2018 (PP)	% achieving a higher std in RWM (PP) - 2022	% achieving a higher std in RWM (PP) - 2019	% achieving a higher std in RWM (PP) - 2018
[Name of school]						
National Average						

Progress Score

	Reading 2022	Writing 2022	Maths 2022	Reading 2019	Writing 2019	Maths 2019	Reading 2018	Writing 2018	Maths 2018
[Name of school]									
National Average									

KS4 tables

	5+ inc. Eng & Maths GCSE (5+ inc. Eng & Maths GCSE PP) 2022	APS Ebacc (Ebacc PP) 2022	Entering Ebacc % 2022	5+ inc. Eng & Maths GCSE (5+ inc. Eng & Maths GCSE PP) 2019	APS Ebacc (Ebacc PP) 2019	Entering Ebacc % 2019	5+ inc. Eng & Maths GCSE (5+ inc. Eng & Maths GCSE PP) 2018	APS Ebacc (Ebacc PP) 2018	Ebacc % entering 2018
[Name of school]									
National Average									

KS4 progress (%)

	English 2022	Maths 2022	English 2019	Maths 2019	English 2018	Maths 2018
[Name of school]						
National Average						

Attainment 8

	Year	A8 score	A8 - English	A8 - Maths	A8 - EBacc
[Name of school]					
National Average					

Progress 8

	Year (previous)	P8 score	P8 - lower CI	P8 - upper CI	P8 - English	P8 - Maths	P8 - EBacc
[Name of school]							
National Average							

KS5 info and data

Delete if not required.

Annex A – map