



## **External Audit Tender Pack**

Impact Education Multi Academy Trust

Accounting Period Commencing 1st September 2025

### **1. Background of the Trust**

Impact Education Multi Academy Trust (IEMAT) is a diverse family of academies serving communities across Calderdale and Kirklees, West Yorkshire. The Trust is committed to delivering high-quality, inclusive education and maintaining strong financial governance.

The Trust's academies include:

- The Whitley AP Academy
- Old Bank Academy
- Hill View Academy
- Castle Hall Academy
- Warley Road Academy
- The Halifax Academy
- Newsome Academy
- Lee Mount Academy
- Newsome Junior Academy
- Berry Brow Infant and Nursery Academy
- Manor Road Academy – joining 1<sup>st</sup> April 2026

### **2. Purpose of this Tender**

The Trust invites suitably qualified audit firms to submit proposals for the statutory audit and associated professional services for the accounting period commencing 1st September 2025.

IEMAT is currently undertaking a merger exercise whereby discussions have been held for constituent academies within Pennine Academies Yorkshire Multi Academy Trust to join the Trust from 1<sup>st</sup> September 2026.

The Trust's academies include:

- Clayton Village Primary School
- Crossley Hall Primary School
- Farnham Primary School
- Grove House Primary School
- Hollingwood Primary School
- Laycock Primary School
- Lidget Green Primary School

IMEAT therefore requires a separate proposal to include provision inclusive of the academies within both IEMAT and Pennine Academies Yorkshire Multi Academy Trust for the accounting period commencing 1<sup>st</sup> September 2026.

The contract will be for a three-year period, with the option to extend for a further one or two years unless terminated earlier in accordance with the terms of the contract.

The Trust is under no obligation to appoint a provider from this exercise and reserves the right not to appoint or to re-run the exercise. The Trust will not be liable for any costs prior to appointment, including submission of tender.

Invoicing arrangements will be made clear with the appointed provider as part of their confirmation of appointment.

### **3. Scope of Required Services**

The appointed firm will be expected to provide the following services:

- Preparation of the annual report and accounts and supporting information as required by the DfE
- Attendance at the Finance Committee meeting and Trust Board meeting at which the statutory accounts are scrutinised
- Audit of the teachers' pension scheme End of Year Certificate (EOYC)
- Preparation and submission of the corporation tax return
- Preparation and submission of the academies accounts return (AAR)
- Provision of other ad hoc services as required by the Trust
- Taxation advice as required
- VAT advice as required

#### **4. Evaluation Criteria**

The Academy Trust will select the best value for money tender using a price:quality ratio. Bids will be assessed on the following factors (not listed in order of importance):

- Technical expertise
- Commitment to working with the Trust to enhance the service offered
- Cost
- Proven experience of working within the academies, education or charity sectors
- Bid quality and compliance

#### **5. Tender Submission Requirements**

Firms should include the following in their submission:

- Firm profile and relevant MAT audit experience
- Proposed audit approach and timetable
- Details of the audit team and key contacts
- Fee proposal covering all required services
- Evidence of quality assurance procedures

#### **6. Tender Timetable**

Key dates are as follows:

- Tender issue date: 10<sup>th</sup> February 2026
- Deadline for clarification questions: 20<sup>th</sup> February 2026
- Submission deadline: 27<sup>th</sup> February 2026
- Shortlisting/interviews (if required): March 2026
- Appointment of auditor: March 2026
- Audit fieldwork commencement: Autumn term 2026
- Final accounts submission deadline: 31<sup>st</sup> December 2026

#### **7. Instructions for Submission**

Tender submissions should be made electronically in PDF or Word format and sent to:

Richard Wetherall  
Interim CFO  
Impact Education Multi Academy Trust  
rwetherall@i-mat.org.uk

Late submissions may not be considered.