



Scheme of Delegation

2026-2027

Quest Learning Trust

Responsibility	Board of Directors
Author	CFOO
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This document sets out the regulations for the trust and its member academies.
It remains in force until superseded

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Introduction

This Scheme of Delegation sets out the respective roles, responsibilities and decision-making authorities of the members, directors, committees, senior executive leaders, headteachers, and local governors within the trust's governance structure.

The purpose of delegation is to ensure that decisions are taken at the most appropriate level, enabling effective governance, strong accountability and efficient operational management across the trust. Delegation supports the delivery of the trust's vision, strategic ambitions and statutory responsibilities by providing clarity over who is responsible for making decisions and exercising particular powers. In delegating functions, the trust board retains overall responsibility and accountability for the performance, conduct and compliance of the trust.

Delegation of authority does not transfer accountability. Directors remain collectively accountable for all functions of the trust, including those that have been delegated to committees, executive leaders, Academy Standards Committees or other individuals. The board therefore reserves the right to review, amend or withdraw any delegated authority and retains oversight of all delegated functions through appropriate reporting, assurance and monitoring arrangements.

All those exercising delegated authority must do so in accordance with the trust's Articles of Association, Funding Agreements, statutory requirements, the Academy Trust Handbook, trust policies and any conditions or limitations set out within this Scheme of Delegation. This Scheme should be read as a framework for effective governance, promoting transparency, accountability and a clear understanding of the respective responsibilities of all individuals and bodies operating within the trust.

Delegated responsibilities

KEY:

RESERVED	Decision/approval reserved to the board or members and cannot be delegated beyond the board or its committees
DELEGATED	Delegated authority for the decision and/or action
RECOMMEND	Make recommendation to decision maker and/or action

CEO	Chief Executive Officer	CFOO	Chief Financial and Operations Officer
CEdO	Chief Education Officer	SET	Senior Executive Team
GP	Governance Professional	SL	School Leader
FAR	Finance, Audit and Risk Committee	HRWB	HR and Wellbeing Committee
C&Q	Curriculum and Quality Committee	ASC	Academy Standards Committee
DBE	Diocesan Board of Education	DfE	Department for Education
RDO	Regional Director's Office		

1. Governance

	Governance	Members	Board of Directors	CEO/Senior Executive Team	Governance Professional	Academy Standards Committee	School Leader
	A. Governance Appointments and Membership Matters						
1.1.	Appoint and remove members	RESERVED DBE appoint corporate member(s) in line with Articles of Association	RECOMMEND				
1.2.	Approve Articles of Association	RESERVED DBE approval required	RECOMMEND				
1.3.	Appoint and remove member elected directors	RESERVED	RECOMMEND				
1.4.	Appoint and remove co-opted directors		RESERVED				
1.5.	Elect a Chair and Vice-Chair of the board each academic year and remove in accordance with the Articles of Association		RESERVED				
1.6.	Appoint and remove the auditors	RESERVED		RECOMMEND			
1.7.	Appoint and remove the Accounting Officer		RESERVED				
1.8.	Appoint and remove the Company Secretary		RESERVED				
1.9.	Appoint and remove the Governance Professionals to the board and its committees		RESERVED	RECOMMEND			
1.10.	Appoint the board committees		RESERVED				
1.11.	Approve Terms of Reference for the board and its committees (including ASC)		RESERVED				
1.12.	Appoint and remove Chairs of committees, including ASCs		RESERVED				
1.13.	Appoint special responsibility directors annually		RESERVED				

	Governance	Members	Board of Directors	CEO/Senior Executive Team	Governance Professional	Academy Standards Committee	School Leader
1.14.	Change delegated power or membership of ASCs		RESERVED				
1.15.	Review and approve annual Scheme of Delegation		RESERVED				
1.16.	Publish statutory governance information on the trust's website			DELEGATED			
1.17.	Ensure school websites are informative and fully compliant						DELEGATED
1.18.	Submit an annual report on the performance to members and publish on the trust's website		RESERVED	RECOMMEND			
1.19.	Secure annual director indemnity insurance cover			DELEGATED			
1.20.	Maintain register of business and pecuniary interests				DELEGATED		
1.21.	Adopt a director and governor expenses policy		RESERVED	RECOMMEND			
1.22.	Maintain register of attendance for directors and local governors				DELEGATED		
1.23.	Complete annual skills audit				DELEGATED		
1.24.	Review and approve annual School Resource Management Self-Assessment Checklist (SRMSAT)		RESERVED	RECOMMEND			
1.25.	Maintain company records at Companies House (directors and Persons of Significant Control (PSC) data)			DELEGATED			
1.26.	Complete and submit the annual Confirmation Statement to Companies House			DELEGATED			
1.27.	Maintain trust and school level information in Get Information About Schools (GIAS)				DELEGATED		DELEGATED school level
	B. Strategic Direction						
1.28.	Determine the trust's vision, strategy and key priorities		RESERVED	RECOMMEND			
1.29.	Determine the vision and values of individual schools, ensuring consistency with the strategic ambitions of the trust			DELEGATED Aligned to trust's vision and values		DELEGATED with the school leader	RECOMMEND
1.30.	Determine the trust's strategic ambitions and related success criteria and monitor progress		RESERVED	RECOMMEND			

	Governance	Members	Board of Directors	CEO/Senior Executive Team	Governance Professional	Academy Standards Committee	School Leader
1.31.	Approve applications for new schools to join the trust		RESERVED	RECOMMEND			
1.32.	Enter into, or withdraw from, a formal partnership		RESERVED	RECOMMEND			
C. Development of policy and procedures							
1.33.	Approve statutory policies that reflect the trust's vision and ethos		RESERVED	RECOMMEND			
1.34.	Approve non- statutory policies that reflect the trust's vision and ethos			DELEGATED			
1.35.	Review and approve school level policies, in line with the published schedule, reflecting the trust's vision and ethos					DELEGATED	RECOMMEND
D. Organisation of trust							
1.36.	Determine school term dates, length, organisation of school day, age ranges, extended provision.		RESERVED	RECOMMEND Significant changes as defined by DfE must be submitted for RDO approval following board approval			RECOMMEND
1.37.	School admissions policies and criteria		RESERVED	RECOMMEND			
1.38.	Admissions appeal process						DELEGATED

2. Finance, Audit and Risk

	Finance, Audit and Risk	Board of Directors	CEO/Senior Executive Team	Academy Standards Committee	School Leader
A. Statutory reporting					
2.1.	Review and approve annual report and financial statements	RESERVED via FAR	RECOMMEND to FAR		
2.2.	Approve annual Budget Forecast Return (BFR)	RESERVED via FAR	RECOMMEND to FAR		
2.3.	Complete and submit Annual Accounting Return (AAR)		DELEGATED		
2.4.	Complete and submit annual Teacher Pension Scheme audit		DELEGATED		
2.5.	Complete and submit the School Estate Management Standards annual return (SEMS)		DELEGATED		
2.6.	Complete and submit the annual Land and Buildings Collection Tool (LBCT) return		DELEGATED DBE approval for church land		
2.7.	Complete and publish annual Gender Pay Gap report on trust website		DELEGATED		
2.8.	Complete and publish PE and Sports Grant funding plan and impact information (ends autumn 2026)			DELEGATED	RECOMMEND
2.9.	Complete and publish the Pupil Premium funding plan and impact information			DELEGATED	RECOMMEND
2.10.	Complete and publish the Inclusion Policy, Inclusive Mainstream Funding plan and impact information			DELEGATED	RECOMMEND
B. Budget and financial management reporting					
2.11.	Determine long term financial objectives of the trust	RESERVED	RECOMMEND		
2.12.	Approve the annual consolidated budget	RESERVED via FAR	RECOMMEND to FAR		
2.13.	Determine the proportion of the overall trust budget to be contributed by schools for central services	RESERVED via FAR	RECOMMEND to FAR		
2.14.	Determine revenue and capital reserve levels	RESERVED via FAR	RECOMMEND to FAR		
2.15.	Monitor the annual consolidated budget	RESERVED via FAR	RECOMMEND		

	Finance, Audit and Risk	Board of Directors	CEO/Senior Executive Team	Academy Standards Committee	School Leader
			to FAR		
2.16.	Manage the approved budget		DELEGATED		DELEGATED (school level)
2.17.	Ratify significant changes to approved budgets	RESERVED via FAR	RECOMMEND to FAR		RECOMMEND to SET
2.18.	Approval of unbudgeted expenditure	RESERVED	DELEGATED within financial delegations		RECOMMEND to SET
2.19.	Receive monthly financial reporting pack including Management Accounts, balance sheet and cashflow forecast. (Chair of Directors and Chair of FAR)	RESERVED	RECOMMEND		
2.20.	Publish monthly income and expenditure reports		DELEGATED		
2.21.	Adopt a reserves and investment policy investments	RESERVED	RECOMMEND		
C. Internal financial control					
2.22.	Ensure robust financial controls across the trust		DELEGATED		
2.23.	Approve trust's scheme of financial delegations	RESERVED	RECOMMEND		
2.24.	Receive and monitor external audit recommendations	RESERVED via FAR	RECOMMEND to FAR		
2.25.	Approval of budget holders		DELEGATED		
D. Risk Management					
2.26.	Approve a trust-wide risk management policy, setting out the trust's appetite for risk, ownership, and escalation which informs the programme of internal scrutiny	RESERVED via FAR	RECOMMEND to FAR		
2.27.	Maintain strategic risk register and submit termly to directors		DELEGATED		
2.28.	Receive strategic risk register annually	RESERVED via FAR	RECOMMEND to FAR		
2.29.	Maintain school level risk register and submit termly to SET			DELEGATED	RECOMMEND
2.30.	Set programme for annual internal scrutiny, ensuring reviewer independence	RESERVED via FAR	RECOMMEND to FAR		

	Finance, Audit and Risk	Board of Directors	CEO/Senior Executive Team	Academy Standards Committee	School Leader
2.31.	Receive and monitor internal scrutiny recommendations	RESERVED via FAR	RECOMMEND to FAR		
E. Purchasing and Procurement					
2.32.	Approve a trust-wide financial management and procurement policy	RESERVED	RECOMMEND		
2.33.	Determine scope of core services to be procured and delivered by the central team on behalf of schools		DELEGATED		
2.34.	Approve ongoing trading with an organisation in the event that it becomes a related party, subject to compliance with DfE's related party declaration and approval limits	RESERVED DfE prior approval for agreements exceeding £40k in any financial year	RECOMMEND		
2.35.	Approve new suppliers		DELEGATED		
2.36.	Approval of formal contracts and leases		DELEGATED within financial delegations		RECOMMEND business case for SET
2.37.	Management of large value procurement/tendering processes		DELEGATED within financial delegations		
2.38.	Orders for goods and services				DELEGATED within approved budget
2.39.	Approve and accept a quotation other than the lowest-priced submission, based on a demonstrated best-value assessment and supporting evidence.				DELEGATED within financial delegations
2.40.	Exempt a procurement from the three-quotation requirement where it can be demonstrated that there is a limited supplier market and obtaining three competitive quotations is not reasonably achievable.		DELEGATED		RECOMMEND to SET
2.41.	Monitor compliance with approved procurement procedures		DELEGATED		
2.42.	Making of gifts		DELEGATED approve compassionate gifts and 'gifts of appreciation' up to £250		RECOMMEND to SET

	Finance, Audit and Risk	Board of Directors	CEO/Senior Executive Team	Academy Standards Committee	School Leader
E. Banking and Cash Management					
2.43.	Approve a reserves and investment policy	RESERVED	RECOMMEND		
2.44.	Open a bank account and approve signatories in the name of the trust or any of its schools	RESERVED	RECOMMEND		
2.45.	Seek approval to borrow money	DfE approval required	RECOMMEND		
2.46.	Cashflow, treasury and investment management		DELEGATED		
2.47.	Manage corporate card programme, including approval of applications and limits for purchasing cards		DELEGATED		
F. Transaction Processing					
2.48.	Payroll – starters, leavers, amendments, timesheets		DELEGATED		DELEGATED changes within approved establishment/ budget
2.49.	Payroll and pension schemes administration		DELEGATED		
2.50.	Monitor appropriate recording of income		DELEGATED		
2.51.	Authorise expenses/purchasing card purchases		DELEGATED except own card		DELEGATED school level - except own card which must be approved by SET
2.52.	Control accounts reconciliation		DELEGATED		
2.53.	Write off bad debts	DfE prior approval required over certain limits	DELEGATED within financial delegations		
G. Fixed assets					
2.54.	Approval of capital projects	RESERVED	RECOMMEND		
2.55.	Management of capital projects		DELEGATED		

	Finance, Audit and Risk	Board of Directors	CEO/Senior Executive Team	Academy Standards Committee	School Leader
2.56.	Approval of funding bids to external parties, including CIF bids and Sport England etc		DELEGATED		
2.57.	Acquiring a freehold on land and buildings	DfE approval required	RECOMMEND		
2.58.	Disposal of a freehold on land and buildings	DfE approval required	RECOMMEND		
2.59.	Review and maintain a capital plan	RESERVED	RECOMMEND		
2.60.	Disposal of heritage assets	DfE approval required	RECOMMEND		
2.61.	Disposal of assets (not land, buildings or heritage)		DELEGATED within financial delegations		
2.62.	Acquisition of assets (not land, buildings or heritage)		DELEGATED within financial delegations		DELEGATED within budget and financial delegations
2.63.	Maintain asset register/security arrangements/loan of assets		DELEGATED		DELEGATED school level
H. Insurances					
2.64.	Approve trust level insurance arrangements – including Third Party Public Liability, Employers Liability, Professional Indemnity and Property Damage and Overseas Travel		DELEGATED		
2.65.	Manage school specific insurance arrangements e.g. motor vehicle				DELEGATED
I. Leasing					
2.66.	Enter into a finance lease	RESERVED in line with financial delegations DfE approval required over ATH limit	DELEGATED within financial delegations		RECOMMEND business case to SET
2.67.	Take up a leasehold on land and buildings	RESERVED DfE approval for lease > 7 years	RECOMMEND		
2.68.	Take up any other lease e.g. photocopier, IT equipment, vehicles		DELEGATED		RECOMMEND business case to SET

	Finance, Audit and Risk	Board of Directors	CEO/Senior Executive Team	Academy Standards Committee	School Leader
			within financial delegations		
2.69.	Grant a lease/licence to occupy on land and buildings	RESERVED DfE approval for lease > 7 years	RECOMMEND		
J. Special payments					
2.70.	Non statutory/non contractual severance and compensation payments to staff	RESERVED DfE Approval over 50k	RECOMMEND		
2.71.	Ex-gratia payments	RESERVED DfE approval required	RECOMMEND		

3. Compliance (not listed elsewhere)

	Ensure Compliance with statutory legislation	Board of Directors	CEO/Senior Executive Team	Academy Standards Committee	School Leader
3.1	Equality, Diversity and Inclusion		DELEGATED		DELEGATED school level
3.2	Modern Slavery		DELEGATED		
3.3	Gender Pay Gap		DELEGATED		
3.4	Whistleblowing		DELEGATED		
3.5	Procurement Act		DELEGATED		
3.6	Fraud Response		DELEGATED		
3.7	Freedom of Information governance		DELEGATED		
3.8	Environmental, Social and Governance (ESG) and sustainability		DELEGATED		

4. People and culture

	People and Culture	Board of Directors	CEO/Senior Executive Team	Academy Standards Committee	School Leader
A. Staffing structure					
4.1.	Approve trust Senior Executive Team structure (SET)	RESERVED	RECOMMEND		
4.2.	Approve central team structure		DELEGATED		
4.3.	Approve school senior leadership team structure		DELEGATED		
4.4.	Approve school annual staffing plan, including TLRs and additional payments, in line with budget		DELEGATED		RECOMMEND aligned to annual budget for consideration by SET
4.5.	Create and approve business cases for unbudgeted variation to the approved staffing structure	RESERVED via FAR	RECOMMEND via FAR		RECOMMEND business case to SET
4.6.	Create and approve job descriptions		DELEGATED		RECOMMEND
4.7.	Approve evaluated job family and pay grade		DELEGATED		
4.8.	Variation to the trust's standard terms and conditions of employment	RESERVED via HR&W	RECOMMEND via HR&W		
B. Recruitment					
4.9.	Appoint CEO, CFO and Governance Professionals	RESERVED DBE participate in CEO recruitment	RECOMMEND participate in selection process for CFO and GP only		
4.10.	Appoint Headteachers and Deputy Headteachers	RESERVED DBE participate in diocesan school headteacher recruitment	RECOMMEND participate in selection process	Participate in the recruitment process	Participate in the recruitment process
4.11.	Approval to recruit all other staff		DELEGATED		RECOMMEND business case to SET for all school level appointments

	People and Culture	Board of Directors	CEO/Senior Executive Team	Academy Standards Committee	School Leader
4.12.	Appointment process for all other staff			Participate in the appointment of school level roles as appropriate	DELEGATED
4.13.	Ensure compliance with current employment legislation, best practice and trust policies		DELEGATED		DELEGATED school level appointments
4.14.	Approve and Issue contract of employment	RESERVED for CEO	DELEGATED except CEO		RECOMMEND formal request to HR/Payroll for new contract
4.15.	Approve and issue contract variations, including flexible working requests		DELEGATED		RECOMMEND formal request to HR/Payroll for change to contract
4.16.	Approve requests for early retirement, sabbatical or secondment	RESERVED for CEO	DELEGATED		RECOMMEND business case to SET via HR
4.17.	Approve requests for leave of absence outside of policy	RESERVED for CEO	DELEGATED		RECOMMEND business case to SET via HR
C. Pay					
4.18.	Approve executive pay policy	RESERVED			
4.19.	Approve pay policy		DELEGATED		
4.20.	Determine pay ranges including TLR and additional payment values	RESERVED for CEO	DELEGATED		
4.21.	Pay on appointment and pay awards outside approved ranges	RESERVED for CEO	DELEGATED		RECOMMEND to SET via HR
4.22.	Approve discretionary payments (recruitment, retention or project allowances etc.)	RESERVED for CEO	DELEGATED		RECOMMEND business case to SET

	People and Culture	Board of Directors	CEO/Senior Executive Team	Academy Standards Committee	School Leader
D. Pensions					
4.23.	Administration of pension provision		DELEGATED		
4.24.	Approve pension discretions (e.g. early retirement, ill health)	RESERVED	RECOMMEND		
E. Operation of policies					
4.25.	Approve statutory HR policies	RESERVED	RECOMMEND		
4.26.	Performance management (annual performance review)	RESERVED for CEO	DELEGATED	Participate in the performance review of school leader	DELEGATED for school staff
4.27.	Approve formal staff restructure plans	RESERVED for CEO	DELEGATED		RECOMMEND business case to SET
4.28.	Invoke redundancy procedures	RESERVED for CEO	DELEGATED		
4.29.	Approve severance/settlement or redundancy agreements	RESERVED for CEO	DELEGATED within financial delegations		
4.30.	Investigate and manage staffing issues in line with the relevant policy	RESERVED for CEO	DELEGATED		DELEGATED school level issues with advice from HR
4.31.	Participate in staffing related decision-making hearings or panels	RESERVED for CEO	DELEGATED		RECOMMEND Present findings and participate in other schools' hearings or panels at invitation of SET
4.32.	Suspension of staff	RESERVED for CEO	DELEGATED		RECOMMEND to SET
4.33.	Dismissal of senior leaders (SET, HT, DHT, AHT)	RESERVED	RECOMMEND Present findings as appropriate		RECOMMEND Present findings as appropriate

	People and Culture	Board of Directors	CEO/Senior Executive Team	Academy Standards Committee	School Leader
4.34.	Dismissal of staff other than senior leaders		DELEGATED minimum 1 director		RECOMMEND Present findings and participate in other schools' hearings or panels at invitation of SET
4.35.	Appeal panel		DELEGATED minimum of 1 director		Present findings as required
4.36.	Act on behalf of the trust in legal disputes, employee complaints and grievances	RESERVED for CEO	DELEGATED		

5. Curriculum and Standards

	Curriculum and Standards	Board of Directors	CEO/Senior Executive Team	Academy Standards Committee	School Leader
A. Quality of Education					
5.1.	Review the quality of education and experience of pupils and young people across the trust	RESERVED via C&Q	RECOMMEND via C&Q		
5.2.	Approve and monitor trust and school targets for pupil achievement, progress and attainment	RESERVED via C&Q	RECOMMEND via C&Q		
5.3.	Monitor the quality of education and experience of pupils in a trust school			DELEGATED Monitor priorities reported by school leaders and hold to account	RECOMMEND to SET/ASC. Report progress to SET/ASC
5.4.	Monitor school targets for pupil attendance, achievement, progress and attainment			DELEGATED monitor school targets and hold school leaders to account	RECOMMEND school level targets and monitor progress. Report to SET/ASC
5.5.	Monitor the impact of school improvement and post Ofsted plans			DELEGATED	RECOMMEND
5.6.	Review impact of school development actions against priorities in the plan			DELEGATED	RECOMMEND
5.7.	Monitor the impact of additional funding including Pupil Premium etc			DELEGATED	RECOMMEND
5.8.	Curriculum: planning, implementation and review, including compliance with any funding agreement requirements			DELEGATED	RECOMMEND
B. Behaviour and Attendance					
5.9.	Implement effective behaviour management related policies		DELEGATED	DELEGATED approve and monitor impact of policy and related data	RECOMMEND

	Curriculum and Standards	Board of Directors	CEO/Senior Executive Team	Academy Standards Committee	School Leader
5.10.	Pupil suspension and exclusions		DELEGATED Review the overall patterns of suspensions and exclusions and report the number of incidents to C&Q	DELEGATED monitor suspensions and exclusions. Convene a panel to review an exclusion in line with statutory requirements	DELEGATED take the decision to suspend or exclude a pupil and report to ASC
5.11.	Direct a pupil to offsite provision or arrange managed move				DELEGATED
5.12.	Monitor use of offsite provision, managed moves, use of restraint	RESERVED via C&Q	DELEGATED	DELEGATED	
5.13.	Monitor attendance and roll movement within schools	RESERVED via C&Q	DELEGATED	DELEGATED	

6. Safeguarding

	Governance	Board of Directors	CEO/Senior Executive Team	Academy Standards Committee	School Leader
6.1.	Adopt a trust-wide template Safeguarding and Child Protection policy that is compliant with statutory guidance	RESERVED	RECOMMEND		
6.2.	Adopt and monitor procedures related to safeguarding		DELEGATED		
6.3.	Review overall outcomes of annual school safeguarding audits conducted by trust personnel	RESERVED via C&Q	RECOMMEND via C&Q		
6.4.	Complete and submit the LA's annual Governor's Safeguarding Report for schools and ensure that any areas identified for improvement are addressed			DELEGATED	RECOMMEND
6.5.	Appoint a board member as director with specialist responsibility for safeguarding	RESERVED			
6.6.	Appoint a governor with specialist responsibility for safeguarding, including monitoring SCR			DELEGATED	
6.7.	Ensure the Single Central Record (SCR) for the trust and its schools is complete and regularly updated		DELEGATED		DELEGATED school level
6.8.	Ensure schools have an appropriate number of trained Designated Safeguarding Leads (DSLs) and that their details are published on the school website				DELEGATED
6.9.	Ensure trust staff receive regular and appropriate safeguarding training		DELEGATED trust level		DELEGATED school level
6.10.	Ensure appropriate members of staff, directors and governors are trained in Safer Recruitment		DELEGATED		
6.11.	Ensure that each school has appointed a designated member of staff to support Looked After Children				DELEGATED school level
6.12.	Appoint a governor with specialist responsibility for Looked After Children Governor			DELEGATED	
6.13.	Approve off-site visits for pupils of more than 24 hours duration, those outside of the UK, or are potentially hazardous			DELEGATED	RECOMMEND
6.14.	Approve appointment of any staff, director, governor, volunteer where DBS contains disclosure		DELEGATED		

7. Inclusion and special educational needs and disabilities (SEND)

	Inclusion and special educational needs and disabilities (SEND)	Board of Directors	CEO/Senior Executive Team	Academy Standards Committee	School Leader
7.1	Monitor overall educational performance of SEND pupils across the trust	RESERVED via C&Q			
7.2	Monitor educational performance of SEND pupils			DELEGATED	
7.3	Adopt a school specific SEND policy			DELEGATED	RECOMMEND
7.4	Ensure compliance with Equality, Diversity and Inclusion legislation	RESERVED			
7.5	Designate a teacher to be responsible for co-ordinating SEND provision (SENCO)				DELEGATED
7.6	Liaise with local authority in respect of pupils who have (or might have) SEND				DELEGATED
7.7	Make provision for SEND pupils with or without an Education, Health & Care Plan (EHCP)				DELEGATED
7.8	Appoint a governor with specialist responsibility for SEND			DELEGATED	

8. Complaints

	Complaints	Board of Directors	CEO/Senior Executive Team	Academy Standards Committee	School Leader
8.1	Adopt trust-wide complaints procedure	RESERVED	RECOMMEND		
8.2	Respond to and hear complaints		DELEGATED trust level	DELEGATED school level	DELEGATED school level

9. Health & Safety and Estates

	Health & Safety and Estates	Board of Directors	CEO/Senior Executive Team	Academy Standards Committee	School Leader
9.1	Adopt a trust-wide health and safety policy ensuring compliance to statutory legislation	RESERVED	RECOMMEND	DELEGATED school level	RECOMMEND school level
9.2	Manage H&S compliance including, statutory testing, risk assessment and appropriate staff training		DELEGATED		DELEGATED school level
9.3	Emergency planning and business continuity planning		DELEGATED		DELEGATED school level in line with trust policy
9.4	Health and safety accident reporting (inc. RIDDOR and near misses)		DELEGATED		DELEGATED school level (report RIDDOR to SET)
9.5	Ensure schools have a designated member of staff who has overall responsibility for every aspect of health and safety				DELEGATED school level
9.6	Appoint a Health and Safety Governor			DELEGATED school level	
9.7	Approve the trust's estates strategy	RESERVED via FAR	RECOMMEND via FAR		
9.8	Manage the trust's estate so it is safe and fit for purpose		DELEGATED		DELEGATED school level

10. IT, data and information management

	IT, data and information management	Board of Directors	CEO/Senior Executive Team	Academy Standards Committee	School Leader
10.1	Appoint a Data Protection Officer (DPO)		DELEGATED		
10.2	Adopt a trust-wide data protection policy and monitor trust compliance with GDPR		DELEGATED		
10.3	Monitor compliance with GDPR policy		DELEGATED		DELEGATED school level

	IT, data and information management	Board of Directors	CEO/Senior Executive Team	Academy Standards Committee	School Leader
10.4	Ensure staff receive regular GDPR training		DELEGATED		DELEGATED school level
10.5	Report and respond to data breaches and subject access/freedom of information requests within the statutory deadlines		DELEGATED		DELEGATED school level
10.6	Develop and implement a cyber strategy, ensuring compliance with DfE cyber standards and report annually to the board		DELEGATED		
10.7	Implement cyber controls and staff training		DELEGATED		DELEGATED school level

11. Communications and marketing

	Communications and marketing	Board of Directors	CEO/Senior Executive Team	Academy Standards Committee	School Leader
A. Branding & Marketing					
11.1	Determine the branding and marketing strategy		DELEGATED		RECOMMEND school level
11.2	Review and approve any long-life school marketing materials (e.g. logo, website, prospectus, publications)		DELEGATED		
B. Communication					
11.3	Determine a communication strategy for the trust		DELEGATED		
11.4	Approve press releases, media communication		DELEGATED		
11.5	Ensure trust and school websites are compliant with statutory guidance		DELEGATED		DELEGATED school level

12. Intervention

Where the Board, Chief Executive Officer, Chief Financial and Operations Officer, Chief Education Officer, or any person acting under delegated authority identifies actual or potential concerns regarding an academy's performance, governance, compliance, safeguarding, financial management or operational effectiveness, the trust reserves the right to intervene proportionately and without limitation.

Intervention may be initiated where there is evidence of:

- failure to meet educational performance expectations or agreed improvement targets
- concerns relating to safeguarding, health and safety, attendance, behaviour, SEND provision, statutory compliance, or regulatory requirements
- governance failures or ineffective leadership
- a material financial deficit, deterioration in financial position, or failure to comply with trust's financial policies, procedures or budgetary controls
- weaknesses in procurement, audit findings, or risk management
- non-compliance with trust policies, funding agreement requirements or the Academy Trust Handbook
- any matter that may expose the trust to financial, legal, reputational, operational or regulatory risk

Where intervention is deemed necessary, the Board or Chief Executive Officer may, acting reasonably and proportionately, may:

- require the academy to produce and implement an improvement or recovery plan
- increase monitoring, reporting and scrutiny arrangements
- require approval from the Central Team for specified financial, staffing, contractual or operational decisions
- direct the deployment of trust personnel, advisers or school improvement resources into the academy
- suspend or remove delegated budgetary authority, either wholly or in part
- freeze recruitment, expenditure, procurement activity or capital commitments
- require the school to follow specific financial or operational instructions
- reallocate functions, responsibilities or decision-making powers from the school leadership team or Academy Standards Committee to the Chief Executive Officer, a trust committee, or the Board
- replace, suspend or dissolve an Academy Standards Committee in accordance with the trust's governance arrangements and Articles of Association
- take any other action considered necessary to secure improvement, compliance, effective governance, financial sustainability, pupil welfare, or protection of trust assets

Withdrawal of Delegated Authority

The Board reserves the right at any time to amend, restrict, suspend or withdraw any delegated power contained within this Scheme of Delegation where it considers this necessary to protect the interests of pupils, the academy, the trust, public funds or compliance with statutory and regulatory requirements.

Principle of Proportionality

Any intervention will normally be proportionate to the level of risk presented and will seek to support school improvement. The Senior Executive Team/Board will endeavour to restore delegated authority once sufficient assurance has been obtained that identified concerns have been addressed and sustainable improvement has been secured.

13. Chairs Action & Virtual Decision Making

Occasionally urgent approval is required for something that is delegated to ASCs or requires board level approval but arranging a meeting is not possible/practicable. In these rare occasions the Chair of the Board or an ASC may approve urgent items (subject to the Scheme of Delegation and financial limits). The Chair (or Vice Chair if the Chair is absent) should consult with the CEO or headteacher as appropriate and report the action to the relevant Governance Professional. In such cases the decision should be logged and added to the next available board agenda as a specific item for transparency.

In addition, directors may provide approval for policies and business cases through online voting methods or email. Normal quorum and voting rules apply.

14. Financial Delegations

Budgeted Revenue Expenditure (approved)

Approver	Primary School	Secondary School
Budget holder	Up to £2,500	Up to £5,000
Headteacher	Up to £5,000	Up to £10,000
CFOO/CEO	Up to £100,000	Up to £100,000
CEO	Up to £250,000	Up to £250,000
Board	Over £250,000	Over £250,000

Unbudgeted Revenue Expenditure

Approver	Limit
CFOO	Up to £25,000
CEO	Up to £50,000
Finance, Audit and Risk committee	Up to £100,000
Board	Over £100,000

Procurement Thresholds

Value	Requirement
Under £5,000	1 quotation considered reasonable value, document value for money
£5,001-£10,000	Minimum 2 quotations
£10,001-£40,000	Minimum 3 written quotations
£40,001 - £214,904	Formal competitive tender or framework procurement
Above £214,904	Procurement 2023 requirements
Strategic/high risk contracts	Board approval regardless of value

Capital Expenditure

Approver	Limit
Headteacher	Up to £5,000
CFOO	Up to £100,000
CEO	Up to £250,000
Finance, Audit and Risk committee	Up to £500,000
Board	Over £500,000

Contract Signing Authority

Contract Value	Authorised Signatory
Up to £100,000	CFOO
Above £100,001	CFOO and CEO

Banking and Payments

Transaction	Authorisation
BACS payment run	Two authorised approvers
Payroll submission	Head of Finance with CFOO review
New supplier set up	Head of Finance
Bank account changes	CFOO and CEO

Purchasing Cards

Role	Card Limit
Budget Holder	£1,000
Headteacher/ School Business Manager	£2,000
CFOO	£5,000
CEO	£10,000

Staffing Decisions

Decision	Approval
Vacancies within approved staffing structure	Headteacher with CFOO approval
New post exceeding approved staffing structure	CFOO/CEO
Restructure creating additional cost	CEdO/CFOO/CEO