

APPENDIX 1
Scheme of Delegation Decision-Making Guidelines & Matrix
Effective Date: 09 September 2025

1. FINANCE

These authorisation limits are taken from the financial regulations that were approved by the Trust Board.

Expenditure Limits within budget (per expense)	
Headteacher (or designated person)	From £5,001 and £10,000
Executive Team	From £10,001 and £35,000
Trust Finance Audit & Risk Committee	From £35,001 to £100,000
Trust Board	£100,001 and over
Virement Limits	
Virements are not permitted	
Writing off bad debts	
Headteacher	Up to £250 (per student) (Headteachers to authorise and finance to action)
Trust Board (ESFA approval as per current ATH)	£251 and over (per student)
Investment Limits (per investment)	
Executive Team	Up to £85,000
Trust Finance Audit and Risk Committee	From £85,001 to £500,000
Trust Board	£500,001 and over
Authorise / check monthly payroll spend - CEO delegated to CFO and HRD	

Above amount in annual funding letter or as per delegated limits under the Academy Trust Handbook 2021, Part 5 - write-offs and entering into liabilities, section 5.18 - 5.21.

Disposal of Surplus Stock, Stores & Assets (estimated value)	
Headteacher	Up to £1,000
Trust Board	£1,001 and over
Trust Board plus prior approval of ESFA	If it exceeds 1% of annual income or £45,000 individually
Other Monetary Limits	
Mileage Allowance	HM Revenue & Customs approved rate
Ordering Procedures	
2 Competitive quotations (written evidence required)	£7,000 to £14,999
3 Competitive quotations and internal tender analysis document (written evidence required)	£15,000 to £49,999
Formal Tendering procedure	£50,001 and over
Tendering procedure FTS	£213,477 for supplies and services
Tendering procedure FTS	£5,336,937 for works

2. POLICY RESPONSIBILITIES

Trust policies shall be maintained on the following basis:

Trust With Personalisation For Each Academy	Trust Policies	Individual Academy Policies
Accessibility Plan	Admissions	Homework Policy
Behaviour	All Finance Policies	Subject Policies
Curriculum	All HR policies (unless stated)	Teaching & Learning Policy
Equalities	Appraisal	Uniform
Home School Agreement	Capability	
Safeguarding	Charging and Remissions	
SEND	Code of Conduct	
	Complaints	
	Cyber Security	
	Data Protection	
	E- Safety	
	Freedom of Information	
	Health & Safety	
	Risk	
	SCR	
	Term Dates	
	Training Dates (2 Trust, 3 Academy discretion)	
	Whistleblowing policy	

3. DECISION MATRIX

From the Effective Date, each Academy LAC and its Councillors shall be (i) accountable or responsible to the Trust; and (ii) supported with, consulted on and informed by the Trust, the matters specified in the matrix below. Any matters not listed, shall remain within the control and responsibility of the Trust and Trustees.

Area of Responsibility	Matter	Level: Accountable, Responsible, Supported, Consulted or Informed
Admissions & Exclusion	Monitoring admission numbers and compliance with admissions policy	Supported
	Exclusions panels	Responsible
Communication	Detailed monitoring of complaints	Responsible
	Monitoring implementation and impact of marketing strategies to ensure each Academy is full.	Supported
	Monitoring of local impact of curriculum plans and schemes including intervention strategies	Consulted
Community	Monitoring of local engagement of stakeholders	Accountable

Finance & Audit	Annual budget plan	Informed
	Compliance with schemes of delegation	Informed
Governance	Self-review and skills audit of LAC	Responsible
	Ensuring Councillor training takes place	Responsible
	Dealing with complaints against the Executive Headteacher or Headteacher.	Responsible
Health & Safety	Routine health and safety inspections	Informed
	Local reporting of compliance concerns and incidents	Informed
HR	Appointment of Executive Headteacher or Headteacher	Supported
	Performance Management of Executive Headteacher or Headteacher	Supported
	Ensuring performance management of staff is conducted properly	Informed
	Monitoring staffing within agreed structures	Informed
Ofsted	Support Ofsted review	Chair attends
Operations	Monitoring of Data Protection policies	Informed
	Monitoring of Cyber Security	Informed
	Preparation and Monitoring of Risk Register	Supported
Peer Reviews	External peer reviews e.g. by another school or trust	Supported
Policies	Compliance with Trust policies	Informed
	Compliance with Academy policies	Accountable
Premises & Resources	Creation of the Academy site development plan	Informed
	Monitoring Academy site maintenance	Informed
Pupil Premium/Sport Premium	Reviewing and challenging the value of money/use of the Pupil/Sports Premium in terms of pupil outcomes and narrowing the achievement gap	Supported
Academy Improvement	Development the annual School Development Plan	Accountable
	Monitoring progress of the School Development Plan	Accountable
	Monitoring Academy performance and improvement using KPIs, SDP targets and dashboard	Supported
	Monitoring progress towards pupil level/cohort targets	Supported
	Monitoring quality of teaching and learning locally	Informed
	MAT curriculum	Informed
Safeguarding	Monitoring local compliance with legislation	Supported
	Monitoring compliance of policy in Academy	Supported
	Checking of Single Central Record	Informed
Strategic Objectives	Set strategic objectives of the Trust	Informed
	Set strategic objectives of the Academies	Supported

Well-being	Monitoring local well-being and stress issues, stress audit and performance management, and recommend actions to be taken	Supported
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