



Warrington Primary Academy Trust

Scheme of Delegation

Ratified: 16th December 2025

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Introduction and Purpose

The Trust Board (“the Board”) of Warrington Primary Academy Trust (“the Trust”) is accountable in law, for all decisions about the Trust and its academies (“schools”). It is vital to ensure there are systems in place so the Board is assured of the quality of education, as well as the safety and good practice of activities across the Trust. However, this does not mean the Board is required to undertake all tasks or make all the decisions itself. This report describes the mechanisms by which governance is delivered through delegated responsibility to the point of impact and the means by which the Strategic Leadership Team (SLT) and Trust Board monitor progress. Three key documents provide a scaffold for this process:

1. The primary purpose of **the Business Plan** is to provide an important point of reference to Key Performance Indicators (KPIs) over the next 3 years and measure progress and the evolution of expectations.
2. The primary purpose of **the Scheme of Delegation** is to inform those involved in governance and oversight in the Trust where the decision making, advisory and other responsibilities lie.ⁱ
3. The primary purpose of **the MAT Assurance Framework** is to help the Trust understand its current capacity to support and drive school improvement through the delivery of the Business Plan. It is then used to evaluate, monitor and report progress across 14 performance elements using diagnostic tools.

The intention of this introduction is to:

- Set out delegations for specific areas of activity or decision making in a clear, usable format.
- Provide clarity about the responsibilities and powers of Trustees, the MAT Strategic Leadership Team and Central Team staff, Governors and Executive Headteachers and Headteachers in respect of key aspects of the leadership and management of the Trust and its schools.
- Ensure compliance with legal and statutory requirements.
- Ensure consistency and avoid duplication or overlap in governance.
- Seek to place governance decision making as close as possible to the point of impact.

This document sits alongside the Trust’s *Financial Scheme of Delegation* (see Appendix 1) which explicitly covers financial delegations.

The delegations have been informed by an assumption that functions will be carried out in line with the Trust’s Articles of Association, agreed Trust policies, procedures or approaches, as well as to meet all compliance requirements. As such, it should be read in conjunction with those documents, together with other Trust documents, such as terms of reference, annual planners, and the annual budget cycle and so on.

The Trust's approach to governance allows it to adapt to the different needs of our member schools. There may be circumstances when the Board will need to intervene and choose to withdraw specific delegated authorities, although these are expected to be the exception rather than the rule.

The key to the Scheme's efficacy will be the way it is operated in practice, together with good communication between the Board and its Committees. All those in our governance community should ensure that they are familiar with and understand the Scheme. It should form part of the papers for every meeting and be regularly referred to so that all steps and decisions are taken within the scope of the Scheme.

Definitions

Effective leadership and governance of schools is a collective endeavour of officers and committees. Together they provide a balance of resources, expertise and accountability to ensure that the Trust's school provision *enables every pupil to thrive*. To work together effectively and efficiently, clear definitions are required.

The key tiers of governance of the Trust are:

- **Trust Board:** The legal accountable body for the trust and meets three times a year. The Board is responsible to the Secretary of State for Education for the effectiveness of each of the Trust's schools. They are referred to within the Trust as "Trustees". Trustees both have and fulfil legal duties as company directors and charity Trustees. It is recognised that, whilst the Board can choose to delegate some of its functions, it cannot delegate its responsibilities. The Board holds the Accounting Officer (CEO) to account for educational outcomes, staff performance and the use of resources.
- **Committees:** The Trust has both School Committees and Central Committees.
- **School Committees:** The Board has established one Local Governing Committee (LGC) for each school. Each LGC is made up of Governors. They have a key role in scrutiny, monitoring and support at local level, with a particular focus on pupil progress and attainment, and quality of teaching and learning. They provide input into school plans and policies, community and stakeholder engagement, and review alignment with the Trust's strategy, approach, ethos and values.

LGCs consist of volunteers (parents, co-opted individuals) and representation from staff. In the Trust's organisational structure their responsibilities are built around their core function. The Trust recognises that the LGC needs a specific description (see the definition of 'S' below) of their responsibilities to have the greatest impact. This responsibility provides an essential balance to Trust and school leadership and stewardship of each school's culture and context.

- **Trust Committees:** The Board has set up Trust Committees for:
 - Quality of Education.
 - Audit and Risk.
 - Pay and HR.
 - Resources.

These have been established to enable review, scrutiny and discussion of key areas to ensure the Board has sufficient understanding and oversight. Trust Committees are made up of Trustees. Detailed committee roles are set out in each committee's terms of reference.

- **MAT Strategic Leadership Team:** Consists of the CEO, Deputy CEO, CFO, COO and the Director of Education. The CEO is the Trust's Accounting Officer and has personal responsibility to the DfE.
- **Trust Leader:** Responsible for delivering the educational and operational outcomes for the Trust as set by the Board. For the purposes of the Scheme of Delegation, the "Trust Leader" includes, Executive Headteachers, Headteachers and Heads of School.
 - **Headteacher:** The individual who has ultimate responsibility for a school in line with the Trust's strategy, approach, ethos and values. (This group includes Executive and Multi School Headteachers).
 - **Head of School:** Has day-to-day leadership and management responsibility for a school. They are line managed by an Executive Headteacher.

Developments to Delegation

In addition to the delegations set out in this document, some functions may be further delegated, for example by the Trust Board to the CEO, or by the CEO to a trust leader. There are also some areas where it makes sense for matters to be dealt with centrally, rather than by individual schools. It is intended that this will achieve economies of scale, as well as reducing the burden on schools.

In line with the Trust's Articles of Association, where any function or power that has been delegated is further delegated, the Board must be informed as soon as is reasonably practicable. The Articles of Association contain further details under the section on Delegation (Articles 105 to 106).

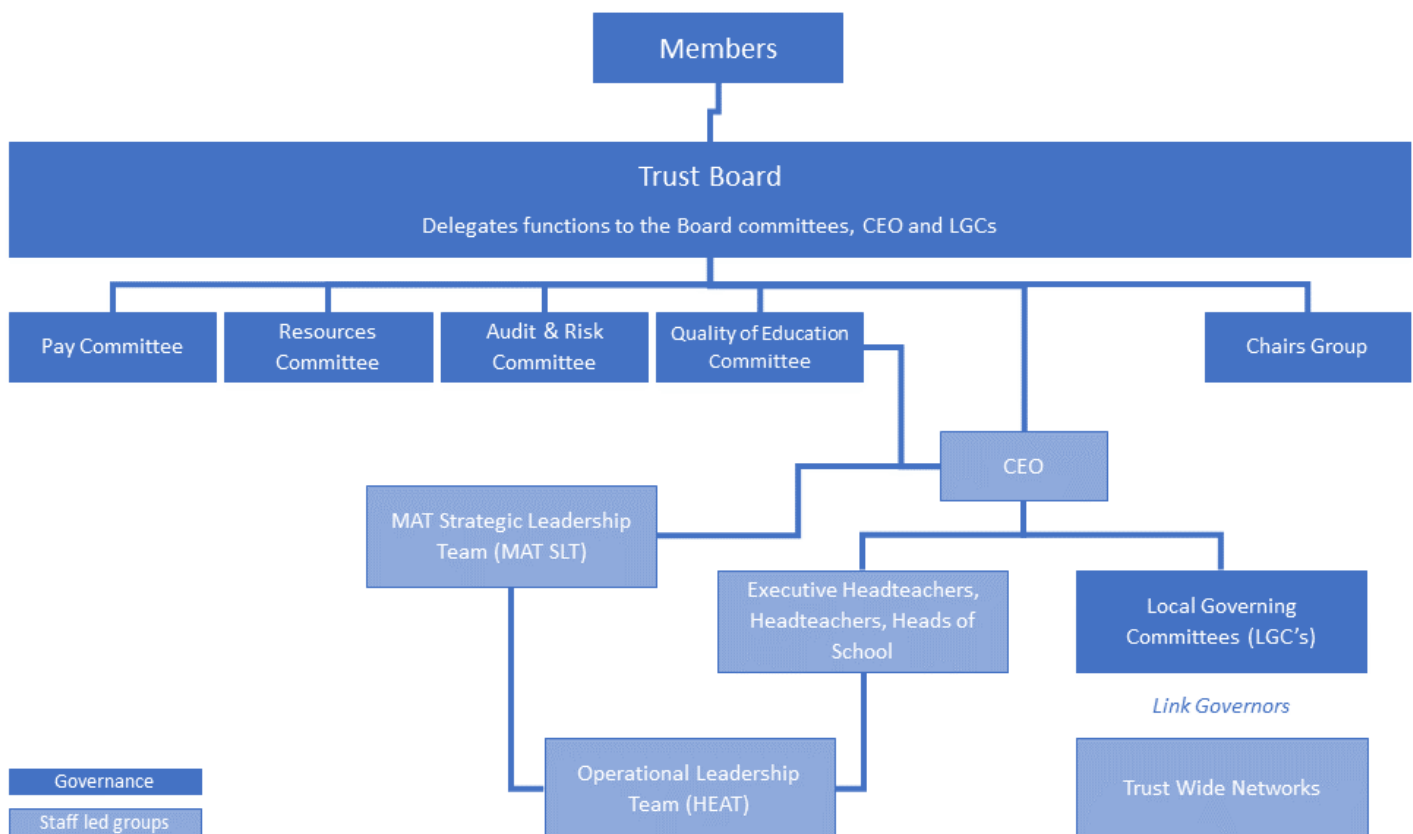
Members

It is recognised that the Trust also has Members. These are a small group of individuals whose key role is to appoint the Trustees and oversee the major decisions of the Trust. The Members are responsible for ensuring the Trust operates within its Articles of Association.

The Academy Trust Handbook and the Trust's Articles of Association, together with relevant legislation, contain key information on Members. Members are the custodians of governance, playing an 'eyes-on, hands-off' role. They have specific roles which can include (subject to Trust documents and relevant legislation):

- Amending the Articles of Association
- Appointing or removing Members or Trustees
- Appointing the Trust's auditors and receiving the audited annual accounts
- The power to change the Trust's name and, ultimately, wind it up.

Governance Diagram



Accountability Definitions:

The main accountability levels used in the Scheme of Delegation are:

A = Accountable / Approval	<ul style="list-style-type: none"> • Answerable for the task on behalf of the Trust and approving how the task will be delivered, including defining appropriate milestones and targets to be reported against. • This will involve monitoring the task providing scrutiny to those responsible in order to approve it is completed. • There is only one Accountable role for each task.
R = Responsible for Completion	<ul style="list-style-type: none"> • Responsible for ensuring a task is completed appropriately. • It is recognised that the person responsible for delivering specific areas of work may draw on other resources, delegates or work with colleagues. • As an example, whilst Headteachers 'deliver' the budget for their

	<p>own school, they will work with other colleagues, including those in finance, in order to do this.</p> <ul style="list-style-type: none"> • It is understood that developing documents or information, processing and collating information for approval or review may also be necessary.
C = Consulted on Task	<ul style="list-style-type: none"> • These will be consulted as part of the process of completing a task. • Their contributions may inform the approach or decision.
S = Scrutiny, Monitoring and Support at school level.	<ul style="list-style-type: none"> • This is a responsibility that is described for Local Governing Committees only, recognising their important role in the Trust. • The LGC provides scrutiny, monitoring and support from a <i>school perspective</i> of both the Trust and also of the school leadership. • This is a representative voice that creates local oversight and assists in sustaining high standards of education to improve the lives of all pupils.
In = Inform / Informed of the Task	<ul style="list-style-type: none"> • These roles will be given/receive one-way information on decisions or approaches.

Summary

In law, the Trust is a single legal entity. That means the Board of Trustees holds all statutory responsibilities that can be identified via the Academy Trust Handbook, Education Acts 1996 and 2002, Charities Act 2011, Academies Act 2010 and Companies Act 2006 (Directors' Duties)

Responsibilities are commonly delegated by Trust Boards. WPAT is no exception in this and has agreed a range of tasks that can be referenced in the 2025 Scheme of Delegation.

The Scheme of Delegation is a living document and, as such, is likely to change and develop as the Trust matures, both in terms of governance and operational leadership.

This recognises the need to be responsive to the evolving context and circumstances of the Trust and ensures that the Trust continues to best meet the needs of its schools and children.

This document, together with the committee structure and terms of reference, will be reviewed at least annually by the Board.

Ref.	Task	Members	Trust Committees					MAT SLT					School			
			Trust Board	Audit & Risk	Resources	Quality of Ed	Pay & HR	CEO	DCEO	CFO	COO	Dir of Ed	LGC	Exec Head	Head	Head of Schl
1	Governance & Policy															
1.1	Appoint/remove Members	A/R														
1.2	Appoint/remove Trustees	A	R													
1.3	Elect chair/vice chair of Trustees annually		A/R													
1.4	Appoint committee chairs annually and remove when necessary		A/R													
1.5	Determine powers of chair of Trustees in urgent situations		A/R													
1.6	Establish and review Trust governance structure		A/R					C								
1.7	Agree a named safeguarding Trustee		A/R													
1.8	Agree a Trust Committee responsible for the oversight of special educational needs and disabilities (SEND)		A			R										
1.9	Agree named careers Trustee <i>(required in secondary schools)</i>		A/R													
1.10	Appoint trust governance professional		A					R			R					
1.11	Undertake Trust governance professional appraisal annually		A								R					
1.12	Articles of Association: review	A	R													
1.13	Articles of Association: ratify changes	A/R														
1.14	Agree scheme of delegation and complete annual review		A								R					
1.15	Agree committee terms of reference (including school committees) and complete annual review		A					R			R		C	C	C	
1.16	Agree role description for link Governor/Trustee areas		A								R					
1.17	Agree Trust Board and committee meeting dates and agendas		A								R					
1.18	Commission external review of Trust Board effectiveness every three years		A/R					C								

Ref.	Task	Members	Trust Committees					MAT SLT					School			
			Trust Board	Audit & Risk	Resources	Quality of Ed	Pay & HR	CEO	DCEO	CFO	COO	Dir of Ed	LGC	Exec Head	Head	Head of Schl
1.19	Complete annual Trust Board self-evaluation		A/R					C								
1.20	Publish governance arrangements on trust and school websites		A								R		S	R	R	R
1.21	Ensure Trust and school websites are compliant and effective		A							C	R		S	R	R	R
1.22	Maintain compliance on GIAS and Companies House		A							R						
1.23	Submit annual report on the performance of the trust to Members		A					R			R					
1.24	Maintain register of interests		A							C	R					
1.25	Maintain a Trustee/Governor expenses policy		A							R						
1.26	Approve statutory policies for the Trust		A	R	R	R	R	C	C	C	C	C	S	In	In	In
1.27	Ensure there is a clear approach to trust-wide policies and the maintenance and adoption of these across the Trust		C					A			R	R	C			
1.28	Determine non-statutory trust-wide policies							A	R	R	R	R				
1.29	Determine school level policies							C	C	C	C	C	A	R	R	R
1.30	Appoint/remove Local Governance committee chairs		A					R					C			
1.31	Appoint/remove Local Governance committee Governors		A					R					C			
1.32	Agree school committee clerking arrangements							A			R		C			
1.33	Agree Trust committee clerking arrangements		A					R			R		-			
1.34	Appoint and dismiss local clerks							A			R		C			
1.35	Agree Local Governance committee meeting dates and agendas, ensuring Trust-wide consistency							A			R		C	C	C	
1.36	Complete annual review of local governance		A					C			R		R	C	C	
1.37	Set clear expectations on monitoring and visits to schools by Trustees		A					R								
1.38	Set clear expectations on monitoring and visits to schools by Governors		A					R					C, S			
1.39	Ensure board reporting channels are established		A					R	C	C	C	C		C		

Ref.	Task	Members	Trust Committees					MAT SLT					School			
			Trust Board	Audit & Risk	Resources	Quality of Ed	Pay & HR	CEO	DCEO	CFO	COO	Dir of Ed	LGC	Exec Head	Head	Head of Schl
1.40	Agree remit and constitution of any working party established to support trust's strategic objectives		A					R	C	C	C	C		C		
1.41	Monitor all complaints raised (including through external agencies e.g. LA, ESFA and Ofsted) across the Trust		C			C		A				R				
2	Vision and strategy															
2.1	Determine Trust's vision, strategy, ethos/culture and key priorities		A					R	C	C	C	C	C	In	In	In
2.2	Apply trust vision and strategy to individual schools							A				C	S	R	R	
2.3	Develop engagement channels with Trust key stakeholders in line with trust vision and priorities		A					R	R	R	R	R				
2.4	Engage with key stakeholders at school level							A			C	C	R	R	R	R
2.5	Agree Trust growth strategy and Business Plan against KPIs		A					R	C	C	R	C	In	In	In	
2.6	Ensure appropriate school development plans are in place and progress monitored							A				R	S	R	R	R
3	Finance															
3.1	Carry out benchmarking and Trust-wide value for money evaluation		A		C			R		R						
3.2	Appoint and performance manage chief financial officer (CFO)		C		In			A								
3.3	Agree reporting and monitoring arrangements for trust and school budgets funding and grants.		A		R			C		R			S	C	C	In
3.4	Prepare management accounts every month setting out the Trust's financial performance and position		In		C			A		R	C					
3.5	Approve expenditure/contracts above a specified threshold (Detail expanded upon in financial scheme of delegation)			A	C			R		R						

Ref.	Task	Members	Trust Committees					MAT SLT					School			
			Trust Board	Audit & Risk	Resources	Quality of Ed	Pay & HR	CEO	DCEO	CFO	COO	Dir of Ed	LGC	Exec Head	Head	Head of Schl
3.6	Produce Trust's financial scheme of delegation to further expand on processes relating to delegated financial powers		A		C			C		R						
3.7	Produce annual report and accounts for the Board.							A		R	C					
3.8	Submit required financial reports and returns		A	R				R		R						
3.9	Agree budget plan to support delivery of Trust strategic priorities		A		C			C		R						
3.10	Agree budget plan to support delivery of school strategic priorities and capital planning		A		C			C		R			C, S	R	R	C
3.11	Approve and monitor annual Trust budget		A		R		C	C		R						
3.12	Approve long term financial plans for the Trust		A					C		R						
3.13	Develop and submit three-year budget forecast for the Trust		A		C			C		R						
4	Operations															
4.1	Appoint and remove external auditors	A	R	R												
4.2	Make recommendation to Board on appointment of external auditor.			A				C		R						
4.3	Receive external auditor's report	A	R	R				C		C						
4.4	Ensure requirements in Academy Trust Handbook relating to the review of the external auditor's plans, findings and effectiveness are adhered to			A	C			C		R						
4.5	Action recommendations arising from internal audits			A				R		R			C			
4.6	Agree and deliver a programme of internal scrutiny ensuring the effective use of external third-parties to support the Trust			A				R	R	R	R	R				
4.7	Agree risk management policy		A					R			R		C, S			
4.8	Oversee the Trust risk register and undertake a full review at least annually		A					R			R					
4.9	Undertake termly review of the Trust risk register			A				R			R					
4.10	Undertake schools' risk registers and conduct regular reviews			C				A			R		S	R	R	C

Ref.	Task	Members	Trust Committees					MAT SLT					School			
			Trust Board	Audit & Risk	Resources	Quality of Ed	Pay & HR	CEO	DCEO	CFO	COO	Dir of Ed	LGC	Exec Head	Head	Head of Schl
4.11	Manage and report on the Trust's risk mitigation strategies			A				R			R					
4.12	Maintain trust contingency and business continuity plans			A				R		R	R					
4.13	Ensure that there is suitable expert support on health and safety for the Trust			C				A	C	C	R			C	C	
4.14	Ensure an effective approach to health and safety across the Trust is maintained		A					R	C	C	R	C				
4.15	Monitor implementation of, and compliance with, health and safety policy and procedures at school level			C				A			C		S	R	R	R
4.16	Agree premises management documents, including estate vision, estate strategy and asset management plan				C			A			R					
4.17	Monitor school estates to ensure they are safe and well-maintained				C			A		R	R		C	C	C	In
4.18	Secure suitable insurance (commercial and/or the risk protection arrangement (RPA)) for the Trust			A				C		R						
4.19	Develop a cyber security framework			A				C			R					
4.20	Agree on proportionate controls that address the risks of fraud, irregularity and theft through relevant policies and processes			A				C		R						
4.21	Ensure there is adequate company secretarial support		A		C			R								
4.22	Appoint a Data Protection Officer (public authority duty under UK GDPR)		A					R								
4.23	Complete and maintain Single Central Record (SCR) and required vetting checks		A					C		C	R			R	R	R
4.24	Receive routine reports on the status of the SCR			A				C		R			In			
4.25	Ensure a digital and technology strategy for each school is in place by 2030.		A					C	C	C	R	C	S			
5	Workforce															

Ref.	Task	Members	Trust Committees					MAT SLT					School			
			Trust Board	Audit & Risk	Resources	Quality of Ed	Pay & HR	CEO	DCEO	CFO	COO	Dir of Ed	LGC	Exec Head	Head	Head of Schl
Appointing/dismissing:																
5.1a	CEO/Accounting Officer		A/R					C								
5.1b	Other staff in MAT SLT team		In					A/R								
5.1c	Executive Headteacher		In					A/R				C	C			
5.1d	Headteacher/Head of School							A/R				C	C, S	R		
5.1e	School level staff							A		C	C	C		R	R	C
Performance management and determining pay/progression:																
5.2a	CEO		A				R	C								
5.2b	Other staff in MAT SLT team						A	R								
5.2c	Executive Headteacher						A	R				C	C			
5.2d	Headteacher/Head of School							A/R				C	C	R		
5.2e	School level staff							A		C	C	C		R	R	C
Undertake panel hearings for staffing procedures such as disciplinary, grievance and capability matters:																
5.3a	CEO		A/R					C								
5.3b	Other staff in MAT SLT team		C					A/R								
5.3c	Executive Headteacher		C					A/R	C			C	C			
5.3d	Headteacher/Head of School							A/R				C	R	R		
5.3e	School level staff							A		C	C	C	R	R	R	C
5.4	Maintain up to date Trust wide pay policy, terms and conditions of employment						C	A		R						
5.5	Approval of exit payments/early retirement/pension discretion						C	A		R						
5.6	Determine the Trust’s Strategic Leadership Team staffing structure						C	A								
5.7	Determine school level staffing structure						C	A				C	S	R	R	

Ref.	Task	Members	Trust Committees					MAT SLT					School			
			Trust Board	Audit & Risk	Resources	Quality of Ed	Pay & HR	CEO	DCEO	CFO	COO	Dir of Ed	LGC	Exec Head	Head	Head of Schl
5.8	Ensure appointment of DSLs and deputy DSLs in school							A				C	S	R	R	
5.9	Ensure appointment of SENCOs in school							A				C	S	R	R	
5.10	Ensure there is effective school improvement capacity within, or accessed by, the Trust							A		C		R	S	R		
5.11	Monitor compliance with safer recruitment requirements		C					A			R					
5.12	Monitor staff wellbeing and workload					C		A			R	C	S	R	R	R
5.13	Monitor staff statutory training (safeguarding, prevent, H&S etc.) and impact of CPD			C				A			R	C	S	R	R	R
6	Curriculum															
6.1	Agree the Trust's School Improvement Strategy					C		A				R		C	In	In
6.2	Agree the Trust Improvement Plan					C		A				R		C		
6.3	Produce a Trust-wide curriculum		C			A		R				R	C, S	C	In	In
6.4	Agree equality information and objectives (public sector equality duty) statement and monitor delivery		C			A		R				R		C	In	In
6.5	Ensure provision of religious education		C			A		R				C	S	R	R	R
6.6	Ensure delivery of collective worship		C			A		R				C	S	R	R	R
6.7	Ensure appropriate provision of Relationships Education and Health Education (primary) and sex education (if provided).		C			A		R				C	S	R	R	R
6.8	Ensure compliance with Spiritual, Moral, Social, and Cultural requirements including the promotion of British values		C			A		R				C	S	R	R	R
6.9	Monitor the inclusiveness of the curriculum		C			A		R				R	C, S	R	R	R
7	Pupils & learning support															

Ref.	Task	Members	Trust Committees					MAT SLT					School			
			Trust Board	Audit & Risk	Resources	Quality of Ed	Pay & HR	CEO	DCEO	CFO	COO	Dir of Ed	LGC	Exec Head	Head	Head of Schl
7.1	Ensure and monitor high standards of teaching and learning across the Trust		C			A		R				R	In	R	R	R
7.2	Ensure high standards of teaching and learning in each school.					C		R				R	A	R	R	R
7.3	Set targets for pupil outcomes across the Trust and monitor in-year data termly		C			A		R				C		C	C	C
7.4	Agree school improvement strategies		C			A		R				R	S	R	R	R
7.5	Approve Trust-wide Pupil Premium statement.		A					R				R				
7.6	Approve school Pupil Premium policy and monitor impact of pupil premium							C				A	S	R	R	R
7.7	Determine use and monitor impact of PE and Sport premium		C			A		R				C	C, S	R	R	R
7.8	Set the dates of school terms and holidays		A					R			R	C	In	C	C	C
7.9	Set the times of school sessions		A					R				C	In	R	R	C
7.10	Monitor attendance and persistent absence of pupils in line with statutory attendance guidance (Aug 2024) and 2024 Pupil Registration Regulations		C			A		R				R	S	R	R	R
7.11	Ensure effective and compliant Trust-wide SEND provision		A			C		R				C	C	R	R	R
7.12	Regularly monitor compliance with SEN code of practice							A				R	C, S	R	R	R
7.13	Monitor effectiveness of SEND provision at a school level, ensuring compliance with relevant policies and statutory requirements					C		A				C	R	R	R	R
7.14	Monitor progress and attainment for all vulnerable children		C			A		R				R	S	R	R	R
7.15	Monitor support for looked after and previously looked after children		C			A		R				C	S	R	R	R
7.16	Monitor pupil behaviour data across different pupil groups		C			A		R				R	S	R	R	R
7.17	Ensure careers provider access across the Trust		A					R				R	In	R	R	R
7.18	Review headteacher decision to suspend/exclude pupils		C			A		R				R	S	R		
7.19	Monitor rates of suspension and exclusion across the Trust		A			C		R				R				

Ref.	Task	Members	Trust Committees					MAT SLT					School			
			Trust Board	Audit & Risk	Resources	Quality of Ed	Pay & HR	CEO	DCEO	CFO	COO	Dir of Ed	LGC	Exec Head	Head	Head of Schl
7.20	Ensure school food standards are met for pupils							A						R	R	R
7.21	Ensure free school meal provision is adequately implemented							A						R	R	R
7.22	Ensure the provision of universal infant free school meals							A				-		R	R	R
7.23	Deliver inclusive extra-curricular activities							A				C	S	R	R	R
7.24	Monitor children's wellbeing and how this is actively supported							A				C	S	R	R	R
7.25	Monitor provision and outcomes for EAL pupils							A				C	S	R	R	R
7.26	Monitor safeguarding arrangements at school level, as Keeping Children Safe in Education requires, ensuring compliance with relevant policies and statutory requirements.		A			C		R				R	R	R	R	R
8	Admissions															
8.1	Agree, maintain and publish admission policy (including consultations)		A	C				R		R			C, S	C	C	
8.2	Implement admissions appeal process		C			C		A				C	In	R	R	C
8.3	Review admissions complaints at panel stage		C			C		A				R	In			
8.4	Submit annual report on the work of LGCs to the Trust							A			C		R			

Appendix 1: Scheme of Financial Delegation

This table outlines authority please refer to the Financial Regulations for detailed processes and procedures.

	Description	DfE	Members	Trust	Resources	CEO	CFO	COO	Director of Education	LGC	Executive Headteacher	Headteacher	Head of School	Deputy Headteacher	Business Manager
Ordering	Best value principles for orders to £999.99														✓
	Evidence of searches for £1,000 to £4,999.99												✓	✓	Or ✓
	Retain three quotes for £5,000 to £24,999.99**					✓	✓	✓	✓		✓	✓	✓		✓
	If lowest quote above £5,000 is not accepted, this must be reported with explanation to Resources Committee				✓										
	Sealed bids process £25,000 to £49,999.99									✓					
	Full tender process +£50,000				✓										
	Orders and invoice processing ensuring segregation of duties*			✓		✓	£25000			£50000	£15000	£15000	£5000	£5000	£1000
Large Value Processing	Invoices of £50,000 or more that are non-statutory or non-contractual (e.g. compensation or severance payment).	✓													
	Processing of invoices above £50,000 that are pre-approved by the Trustees through restricted grants or capital**					✓	✓								

	Description	DfE	Members	Trust	Resources	CEO	CFO	COO	Director of Education	LGC	Executive Headteacher	Headteacher	Head of School	Deputy Headteacher	Business Manager
Debt	Bad debt write off – the Trust must notify ESFA prior to writing off 1% of income or £45,000 whichever is lower			✓			£5000			£5000		£500			
	Severance payments up to £5,000 if process HR are followed.					✓	✓	✓	✓		✓	✓			
	Severance payments over £5,000				✓										
	Severance payments of over £30,000 statutory plus £50,000 non-statutory prior approval required from ESFA and HM Treasury.			✓											
	Maintaining the asset register to monitor movement of assets														✓
	Asset write-off			✓			£5000			£5000	£500	£500			
	Fraud of £5,000+ must be notified to ESFA immediately			✓											
Budgeting	Set a credit budget				✓					✓					
	Mid-year budget amendments - appoint staff within agreed staffing profile					✓	✓	✓	✓		✓	✓			
	Mid-year changes to budgets up to £9,999.99					✓	✓	✓	✓		✓	✓			
	Mid-year changes to budgets over £10,000.00				✓										

	Description	DfE	Members	Trust	Resources	CEO	CFO	COO	Director of Education	LGC	Executive Headteacher	Headteacher	Head of School	Deputy Headteacher	Business Manager
	Set a deficit budget – Trust must notify ESFA within 14 days of formally proposing.			✓											
Borrowing	Finance leases and overdrafts can only be arranged with the ESFA's prior approval			✓											
	Salix loan on capital projects				✓										
	Credit cards transactional limit					£2500	£2500	£2500			£2500	£1,000	£1,000		£1,000
	Credit cards monthly limit					£10000	£10000	£10000			£10000	£5,000	£5,000		£5,000
	Approval of temporary change to credit card transactional or monthly limit				✓										
	Credit card approval in advance for any specific officers other than Headteachers or Business Managers				✓										

* Dual authorisation operated.

** A record of such transactions must be reported to the next Resources Committee.

To be read in conjunction with the ESFA Academy Trust Handbook and WPAT Financial Regulations.

ⁱ All Scheme of Delegation updates and amendments must be aligned with the annual review cycles for Trust Committee Terms of References and Job Descriptions of responsible officers.