Academies Trust

Scheme of Delegation Summary Matrix - September 2025

The following descriptions are used in this document to describe the roles of the various groups and individuals.

Accountable (and Approver) - A

Ultimately answerable for the task being delivered. May also be responsible for completing the task, or may delegate the task to others who are responsible for its completion. There should be only one group/person accountable for each task/decision.

Responsible – R

Responsible for the delivery. Does the work to achieve the task.

Consulted – C

Needs to be involved before the decision is made. Communication is two-way – these are important stakeholders or have relevant specialist knowledge in the subject.

Informed – I

Those to be kept up-to-date on progress. Communication is one-way, and may be updated only when the decision has been taken or the task completed.

References to the CEO include members of the central team to whom the CEO will delegate, for example the Deputy CEO, in relation to financial matters and the Regional Directors, in relation to educational matters.

This document should be read in conjunction with the Trust's policy schedule and financial regulations.

Activity		TB	CEO	ACC	HT
1. Strategy, culture and governance					
1.1	Setting Trust vision	A	C	C	C
1.2	Setting Trust culture and values	A	I	I	I
1.3	Setting Trust strategic plan	A	R	C	C
1.4	Monitoring progress against the strategic plan	A	C	C	
1.5	Setting academy development plans in line with the Trust's strategic plan		A	I	R
1.6	Monitoring progress against the academy development plan		A	C	C
1.7	Setting expectations for trustee conduct	A			

Be yourself, always	Do what matters most	Show you care	Succeed together

1.8	Fostering equality, diversity and inclusion including building a diverse board	A		R	
1.9	Ensuring trustees possess appropriate skills including ensuring appropriate financial skills	A	I		
1.10	Ensuring compliance with the Trust's articles of association	A	R		
1.11	Ensuring compliance with the Academy Trust Handbook and Funding Agreements	A	R		
1.12	Undertaking regular skills audits of trustees	A	R		
1.13	Reporting on the effectiveness of ACCs		C	A	C
1.14	Establishing and appointing board committees	A			
1.15	Ensuring statutory policies are in place and published as needed	A	R		
1.16	Comply with all Trust policies	A	R	R	R
1.17	Nominating Lead Trustee for Safeguarding and SEND	A			
1.18	Ensure Trust website is maintained and compliant with statutory requirements and DfE/ESFA expectations and in line with Trust brand requirements	A	R		
1.19	Ensure academy websites are maintained and compliant with statutory requirements and DfE/ESFA expectations and in line with Trust brand requirements		C	C	A
1.20	Approval of statutory statements and information disclosures at academy level (e.g. Pupil Premium annual report, SEND information report, Sports Premium annual report, etc)		A		R
1.21	Procure appropriate governance indemnity insurance	A	R		
1.22	Appoint (and remove) to the post of the Chair of ACC	A	R	I	C
1.23	Appoint (and remove) to the post of Vice-chair of the ACC			A	I
1.24	Ensure a suitably skilled / experienced clerk is appointed for the Board	A	R		
1.25	Approve/ratify the appointment of (and remove) sponsor ACC members	A	R		I
1.26	Approve the appointment of community ACC members		C	A	I
1.27	Establish the process for electing parent and staff ACC members		A	I	I
1.28	Implement the process for electing parent and staff ACC members		C	I	A
1.29	Set up register of ACC members' business interests and ensure these are published on academy website		I	A	R

1.30	Set up register of Trustees' business interests and ensure these are published on Trust website	A	R		
1.31	Approve and set up CCMs' expenses scheme	A	R		
1.32	Approve and set up trustees' expenses scheme	A	R		
1.33	Consider whether or not to delegate functions to individuals or working groups of ACCs	A		R	
1.34	Engaging with stakeholders and ensuring stakeholder voice is heard and taken into account in decision-making	I	R	A	C
1.35	Determine the indicators that trigger the withdrawal of delegated responsibility	A	R	I	I
1.36	Approve Trust-wide policies	A	C	I	I
1.37	Approve academy-level policies (Regional Director accountability)		A	I	R
1.38	Approve academy-level policies (Headteacher accountability)		C	I	A
1.39	Review scheme of delegation annually	A	R	I	I

Activity		TB	CEO	ACC	HT
2. Finance					
2.1	Approve Trust three year business plan	A	R	I	I
2.2	Approve Trust budget plan for the financial year	A	R	I	I
2.3	Approve academy three year business plan (subject to board approval 2.1 & 2.2)		A	I	R
2.4	Approve Academy budget plan for the financial year (subject to Board approval 2.1 & 2.2)		A	I	R
2.5	Monitor monthly expenditure including all additional school funds		A		R
2.6	Report monthly expenditure including all additional school funds		A		R
2.7	Monitor quarterly expenditure including all additional school funds and debts	R	A		R
2.8	Report and review quarterly expenditure including all non-general academy grant funding and any debt collection	R	A	I	
2.9	Establish and publish Trust-wide charging and remissions policy	A	R		I

2.10	Establish and publish academy-level charging and remissions policy	I	A	C	R
2.11	Bad debt write-off in accordance with Academies Financial Handbook	A	R		I
2.12	Issuance of guarantees, indemnities and letters of comfort	A	R		I
2.13	Appoint internal auditors	A	R		
2.14	Approve financial policy, procedures and controls across Trust	A	R		C
2.15	Comply with the Academy Trust Handbook including cheques/ BACS Processed by the Academy to be signed in accordance with the scheme of delegation/ bank mandate	A	R		R

Activity		TB	CEO	ACC	HT
3. Human Resources					
3.1	Determine academy staffing structures in accordance with approved budgets		C	I	A
3.2	Approval of appointments falling outside of the academy approved budget	A	R	I	C
3.3	Appointing the CEO	A			
3.4	Central Trust senior leadership team (SLT) appointments in accordance with budget decisions / approvals	A	R		
3.5	Trust central and hub team appointments (exc. SLT) in accordance with budget decisions/approvals	I	A		
3.6	Executive Headteacher/Headteacher appointments	I	A	I	
3.7	Head of school appointments	I	A	I	
3.8	Vice principal/deputy headteacher appointments in accordance with budget decisions/approvals		A		R
3.9	All other academy-based appointments within approved budgets			I	A
3.10	Determine pay policy (including discretions)	A	R	I	I
3.11	Determine trust-wide terms and conditions of employment	A	R	I	I
3.12	Determine CEO pay	A			
3.13	Determine SLT pay	A	R		
3.14	Implement pay policy and terms and conditions of employment within central team		A		

3.15	Implement pay policy and terms and conditions of employment within academies		A		R
3.16	Determine performance management (PM) policy	A	R	I	I
3.17	Undertake PM of CEO	A			
3.18	Undertake PM of Headteacher		A	C	
3.19	Implement PM policy and undertake performance management of all other academy staff		A		R
3.20	Implement PM Policy and undertake performance management of central and hub staff	I	A		
3.21	Determine disciplinary and capability policies	A	R	I	I
3.22	Implement disciplinary and capability procedures in respect of headteachers		A	I	I
3.23	Implement disciplinary and capability procedures in respect of all other academy staff		A		R
3.24	Implement disciplinary and capability procedures in respect of central Trust SLT	A (R for CEO)	R		
3.25	Implement disciplinary and capability procedures in respect of all other central and hub staff		A		
3.26	Lead Trust wide relations with trade unions, and agree trade union recognition and facility agreement (TURFA)	A	R	I	I
3.27	Lead Academy wide relations with trade unions, and implement TURFA		A		R
3.28	Approval of all exit payments exceeding contractual notice (e.g. settlement agreements, redundancy payments) in accordance with the Academy Trust Handbook	A	R		
3.29	Approval of early retirement (where there is a cost to the organisation)	A	R		C
3.30	Approval of pension discretions within the local government pension scheme (LGPS) requirements	A	R		C
3.31	Ensure compliance with equalities legislation	A	R	C	C

Activity		TB	CEO	ACC	HT
4. Curriculum and Learning					
4.1	Prepare and agree Trust curriculum and qualification statement	A	R	I	C

4.2	Implement curriculum and qualification policy		A	I	R
4.3	Monitoring standards of teaching		A	I	R
4.4	Decide which subject options will be taught		A	I	R
4.5	Set targets for Trust outcomes	A	R	I	I
4.6	Deliver targets for academy outcomes	I	A	I	R
4.7	Plan and deliver academy improvement strategies		A	C	R
4.8	Determine Trust student/ pupil discipline principles statement	A	R		
4.9	Implement academy discipline policy based on Trust principles statement			C	A
4.10	Statutory review of permanent and fixed term exclusions		C	A	
4.11	Direct reinstatement of excluded students			A	
4.12	Set admissions policy and ensure this is reviewed in line with statutory requirements	A	C	C	
4.13	Form student admission appeals panel and conduct admission appeals process			I	A
4.14	Any reduction or increase to the published admission number (PAN)	A	R	C	C
4.15	Set times of academy day and dates of academy terms and holidays		C		A
4.16	Ensure provision of free academy meals to those students meeting the criteria			I	A
4.17	Adopt and review home/academy agreements		C		A
4.18	Discharge duties in respect of students with special needs		A	C	R
4.19	Ensure compliance with SEND Code of Practice	I	A	C	R
4.20	Deliver support for looked after children	I	A	C	R
4.21	Approve non-routine educational visits involving adventurous activities and/or overnight stays, and/or foreign travel		A		R
4.22	Approve all other educational visits			I	A

Activity		TB	CEO	ACC	HT
5. Buildings					
5.1	Ensure that health and safety regulations are followed including regular audits		A		R
5.2	Building insurance and personal liability	A	R	I	I

			TB	CEO	ACC	HT
5.3	Maintain Academy buildings in accordance with approved Academy buildings strategy and approved revenue budget		A		R
5.4	Establish a Trust Health and Safety Policy (including risk assessment)	A	R	I	I
5.5	Implement the Health and Safety Policy approved by the Trust Board and Undertake risk assessments in accordance with that Policy		A		R
5.6	Request an external audit of Health and Safety practice	A	R	I	
5.7	Produce Academy buildings strategy for approval		A		R

Activity			TB	CEO	ACC	HT
6. Other						
6.1	Agree and monitor academy strategy around community engagement			A	R	
6.2	Agree and implement procedures for reporting to parents		I	A	R	
6.3	Ensure stakeholder voices are heard in trust-wide decision making	A	R	R	
6.4	Ensure stakeholder voices are heard in local decision making			A	R	
6.5	Set trust-wide policy in relation to safeguarding children and young people in line with statutory requirements and monitor its effectiveness	A	R		I
6.6	Set academy level policy in relation to safeguarding children and young people in line with Trust and statutory requirements, including appointing a suitably trained designated safeguarding lead (DSL), and monitor the effectiveness of this	A	C		R
6.7	Ensure high quality career advice and support are in place for all students			A	R	
6.8	Agree Trust branding in agreement with the sponsor	A	R	I	I
6.9	Comply with Trust branding		A		R
6.10	Establish a Risk Management Policy (including Risk Registers)	A	R		R
6.11	Maintain, monitor and report in respect of trust-wide risk registers in accordance with the Risk Management Policy	A	R		
6.12	Maintain, monitor and report in respect of academy risk registers in accordance with the Risk Management Policy		A	C	R

Appendix H: Summary of Financial Delegations

Co-operative Academies Trust	Business Planning / Re-Forecast(s) - Revenue Expenditure Authorisation Levels							Capital Investment / Expenditure Authorisation Levels				Trust Procurement - Authorisation Levels			
Financial Regulations - Summary Authorisation Levels	Business Plan Budget Approvals	Revised forecast (Re-forecast) approvals	Budget/Re-forecast Overspend Approvals	New Unbudgeted/re-forecast Cost Approvals	New Unbudgeted/re-forecast Staff Costs	Budget Virement Approvals	Settlement Agreement/Restructuring Cost Approvals	B Plan/Forecast(s) All Capital Schemes Approvals	Capital - Minor Works < £50,000 Approvals	Capital - Major Works > £50,000 Approvals	All Capital (Budgeted and Unbudgeted) Overspends Approvals	Tender / Contract Award Approvals	All Purchase Orders/Invoice Approvals	Order/Invoice Overspend Approvals	Employee Expense Claim Approvals
Specified Budget Holder	Preparation	Preparation	-	-	-	-	-	Preparation	Upto £2,000	-	-	-	Upto £2,000	-	-
Academy Finance Lead / RFD	Preparation	Preparation	-	-	-	-	-	Preparation	Upto £5,000	-	-	-	Upto £5,000	-	Upto £500
Academy Leader / EHd	Preparation	Preparation	Up to £5,000	Up to £5,000	Up to £5,000	Up to £20,000	-	Preparation	Up to £30,000	-	Up to £5,000	Up to £30,000	Up to £30,000	Up to £5,000	Up to £1,000
Regional Director	Review / Recommend	Review / Recommend	Up to £10,000	Up to £10,000	Up to £10,000	Up to £40,000 with DCEO approval	Up to £5,000 (alone) Up to £10,000 with CPO Approval	Review / Recommend	Up to £40,000	-	Up to £10,000	Up to £40,000	Up to £40,000	Up to £10,000	Up to £2,000
Senior Leadership Team (Trust SLT) Chief Executive Officer (CEO) Chief People Officer (CPO) Regional Director (RD) Deputy Chief Executive Officer (DCEO). Chief Operating Officer (COO) Chief Governance Officer (CGO)	Review / Recommend SLT Lead	Review / Recommend SLT Lead	Up to £50,000 with Any SLT with CEO/DCEO Approval	Up to £50,000 with Any SLT with CEO/DCEO Approval	Up to £80,000 with Any SLT with CEO/DCEO Approval	Above £40,000 Any SLT with CEO/DCEO Approval	Up to £25,000 Any SLT with CEO/DCEO Approval	Review / Recommend SLT Lead	Up to £50,000 SLT Lead	Up to £50,000 Any SLT with CEO/DCEO Approval	Up to £50,000 with Any SLT with CEO/DCEO Approval	Up to £50,000	Up to £50,000	Up to £15,000	- Up to £1,000 Up to £1,000 Up to £1,000 Up to £1,000 Up to £1,000 Up to £1,000
Chief Executive Officer (CEO)	Review / Recommend	Review / Recommend	Over £50,000 with Board Approval	Over £50,000 with Board Approval	Over £80,000 with Board Approval	Above £40,000	Up to £50,000	Review / Recommend	-	Up to £100,000	Over £50,000 with Board Approval	Up to £100,000	Up to £100,000	Up to £30,000	Up to £2,000
Board	Approval	Approval	See Above	See Above	See Above	-	Above £50,000	Approval	-	Above £100,000	See Above	Above £100,000	Above £100,000	Above £30,000	Above £2,000
Trust Procurement Thresholds															
1 Verbal Quote									Up to £2,000	Up to £2,000		Up to £2,000	Up to £2,000		
2 Verbal / Emailed Quotes (both verbal quotes must be recorded on purchase order / purchasing records)									£2,001 to £5,000	£2,001 to £5,000		£2,001 to £5,000	£2,001 to £5,000		
3 Written Quotes									£5,001 to £40,000	£5,001 to £40,000		£5,001 to £40,000	£5,001 to £40,000		
Full Tender Requirement									Above £40,000	Above £40,000		Above £40,000	Above £40,000		

Notes

This table is intended to supplement the finance regulations and should be read in conjunction with the relevant Finance Regulations version - September 2024

All approvals are cumulative - all delegates earlier in the chain must have approved before passing onto the next delegate (i.e. an order of £25,000 needs to be approved by Budget Holder>Academy Finance Lead>Academy Leader) and must be an employee of the Trust

Where an individual holds multiple roles under the Summary Authorisation Limits, the most senior designation will apply (eg an SLT Member may also be a Specified Budget Holder)

Where the document allows it, the Company Secretary may cosign a contract, deed or other relevant document.