

Scheme of Delegation 2025-2026

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1.0 Introduction

As a Multi Academy Trust (MAT), the Trust Board of the Ted Wragg Trust (TWT) is accountable in law, for all major decisions concerning the schools and subsidiary companies.

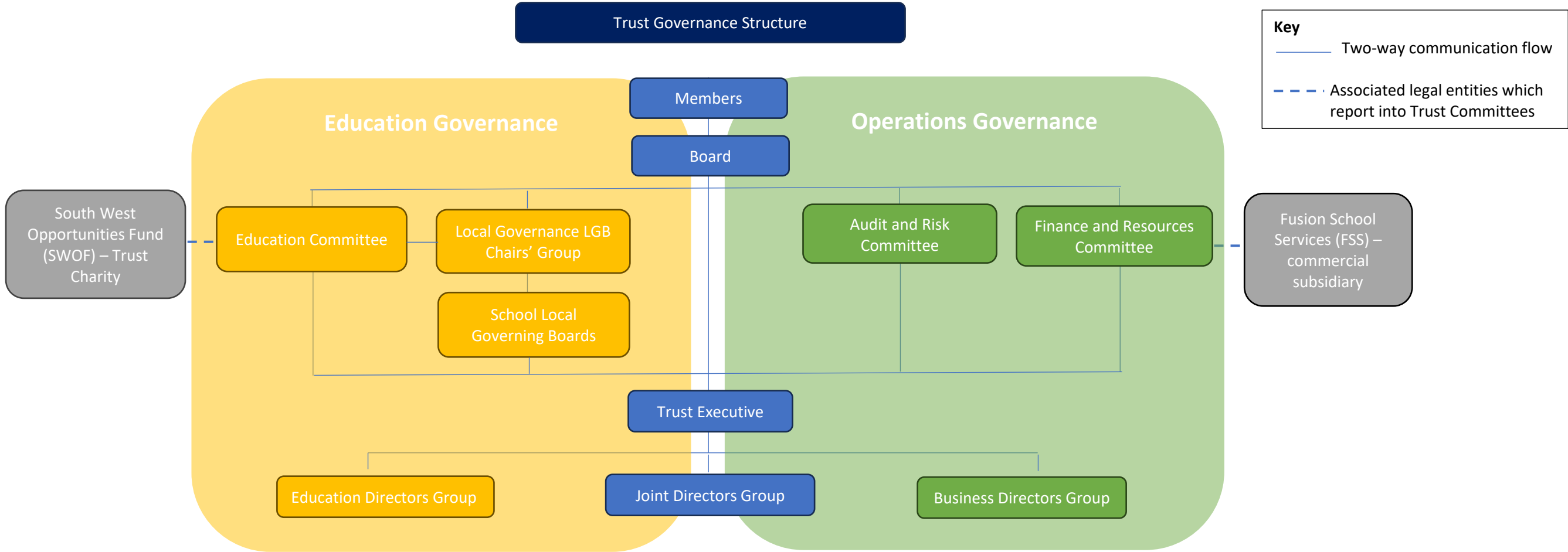
The Trust Board is not required to carry out all the Trust’s governance functions and many can, and should, be delegated to the CEO & Executive Teams, the Trust Board’s Committees and the school Local Governing Boards (LGBs).

The Scheme of Delegation (SoD) is the key document that defines the lines of responsibility and accountability in a MAT to ensure that the Members, Trustees, Trust Board Committees, Subsidiary Company, LGBs, Executive Leadership and School Headteachers understand their role and responsibilities.

This overarching Scheme of Delegation for decision making in the Trust should not be confused with the written Scheme of Delegation of Financial Powers referred to in the DfE’s Academy Trust Handbook.

Where responsibilities are held both at individual school level and Trust wide, further breakdown of individual school responsibility can be found in related policies and guidance and the [Ted Wragg Standard](#) where the consistent core of expectation for Headteachers and their schools is clearly articulated.

2.0 Trust Governance Structure



3.0 Transparency

Ted Wragg Trust is the sole shareholder of a commercial subsidiary, [Fusion School Services](#) which is governed by its own Articles and Scheme of Delegation. Related party transactions are reported to both Fusion Board and TWT Board. Conflicts of interest are declared and managed as per procedure.

TWT have also established a charity; [South West Opportunities Fund](#), which is governed as per its Articles.

4.0 Committee Abbreviations

F&RC	Finance & Resources Committee
A&RC	Audit & Risk Committee
EC	Education Committee
LGBC	Local Governing Board Chairs Group
FSS	Fusion School Services Ltd Board of Directors

5.0 Summary of delegations

Key to delegations:											
R	A	Accountable and Responsible for action									
R		Responsible for action at this level									
A		Accountable for action at this level (final decision and approval body)									
S		Support and challenge to those accountable and/or responsible for decision making									
C		Consulted by those accountable and/or responsible for decision making (this must be prior to any final decision)									
I		Informed by those accountable and/or responsible for decision making (this may be after a final decision has already been made)									
Ref	Delegations	Board delegated authority	Source	Members		Trust Board	Committee	LGBs	CEO/DCEO & Senior Exec	Heads	
A) Governance											
A.1	Articles of Association (AoA) agree and review updated version	No	ATH	A	R	C			S		
A.2	Member and Trustee appointments and removal from office	No	ATH & AoA	A	R				I		
A.3	- Members			A	R						
A.3	- Trustees (Member Appointed)			A	R	S					
A.4	- Trustees (Co-opted)			A		R					
	- Trust Chair/Vice Chair appointment			A		R					
	- Safeguarding Link Trustee Appointment	A		R							
	- Careers Link Trustee Appointment	A		R							
	- SEND Link Trustee Appointment	A		R							
A.5	Governance structures (Trust and Local Governance)	No	ATH & AoA	I		A	R		C	I	
A.6	- Trust			I		A	R		C		
	- Local Governance & Supported Local Governing Boards (SLGB)			I		A	R		C		
A.7	Local Governing Board (LGB) membership:	No	ATH & AoA			A	R		S	I	C
	- LGB Governors Appoint/Remove	No	ATH & AoA			A	R		S	S	C
	- Parent & staff election Appoint/Remove	No	ATH & AoA			A	R		S	I	C
	- Chairs Appoint/Remove	Yes	ATH & AoA			I		A	R	I	C
	- Vice Chair Appoint/Remove					I					
A.8	Governance Professional Appointment(s)	No	ATH			A	R		C		
	- Trust Governance Professional (Clerk to the Trust)					A	R		C		
	- Head of Governance	Yes				A			C	R	C
A.9	- Governance Officer(s)					A			C		C
A.10	Scheme of Delegation, including policy approval delegations	No	ATH	I		A	R		I	C	I
A.11	Terms of Reference (ToR) and annual Cycles of Business:	No	AoA, TWT			A	R		C	C	I
A.12	Trust Board, Trust Committees & Sub-committees					A	R		C	C	I
A.13	Local Governing Boards (LGB) & Supported LGBs	Yes	ATH & DfE			A	R				
A.14	Register of pecuniary, business & loyalty interests for Members, Trustees, Governors and CFO	Yes	DfE							A	R
A.15	Register of pecuniary, business & loyalty interests for Staff	Yes	DfE			A	R				
A.16	Trust & Local Governance information published on the Trust/School Website (as appropriate)	No	ATH			A		S (A&RC)		R	S
A.17	Trust Risk Registers (Strategic) Monitor & Review Trust Risk Register, including specific school strategic risks (as appropriate)	Yes	DfE	See policy management schedule for list of delegations							
A.18	Policies - Review, define, delegate as per statutory policy approval, Trust or school as appropriate (see policy management schedule)	Yes	ATH, Competency Framework, Auditor			A	R		R		
A.18	Annual Skills Audit of Trustees & Governors: ensure the boards have the right skills on the Trust and LGBs					A	R		R		

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B) Trust wide organisational strategy										
B.1	Trust's Vision, Ethos & Strategic direction	No	ATH	C	A	R		S	C	C
B.2	Admission of new academies	No	ATH	I	A	R			R	
B.3	Trust Mergers	No	ATH	I	A	R			R	
C) Finance										
C.1	Appointment of External Auditors	No	ATH	A	R	C (A&RC)				
C.2	Annual Approval of Trust Annual Accounts	No	ATH & Companies Act	I	A	R (F&RC)				
C2.1	Annual Approval of Fusion Annual Accounts	Yes	ATH						R	
C.3	Financial Reports & Returns - Funding & regulatory bodies - Accounting returns - Department for Education - PAYE & VAT returns	Yes	Financial regs		A	S (F&RC)			R	
C.4	Entering into leases or other legal arrangements (other than standard non-property operating leases - see purchasing)	Yes	ATH		A	R (F&RC)			R (+ Director of Finance)	
C.5	Internal Control Systems - establish control frameworks incl. internal audit - setting delegated authority limits for financial transactions - financial policies and regulations (incl. procurement strategy)	No	ATH		A	R (A&RC) R (F&RC)			S	
C.6	Related Party Transactions - Board oversight with approval delegated to F&R - records show transaction transparency & compliance	No	ATH		A	R (F&RC)			S	
C.7	Trust Budget & Management Reporting - Annual Budget - receipt and review of management accounts and financial forecasts	No	ATH		A	S (F&RC)			R	
C.8	- reporting arrangements on use of educational grant funding (relevant committees as appropriate)	Yes	ATH			A			R	R
C.9	Banking Authority & Cash Management - Cashflow Management, Treasury & Investment Policy	Yes	TWT Financial Regs		A	C (F&RC)			R	
C.10	- Open a bank account and approve signatories				A (F&RC)		R			
C.11	Fixed Assets; management of capital projects and disposal of assets (as per thresholds)	Yes	Financial Regs			A (F&RC)			R	R
C.12	Insurances; Annual Risk Review & Premium Renewal	Yes	ATH			A (F&RC)			R	
D) Education										
D.1	Trust School Improvement Strategy	Yes	ATH	I	A	S (EC)	C		R	C
D.2	School improvement processes including data, targets and quality assurance (Trust/school as appropriate)	Yes	ATH			A (EC)	S		R	S
D.3	Governance for attendance at School Ofsted inspections	Yes	EIF & TWT		A		C		R	C
D.4	Stakeholders: ensure engagement with the school community; parents, students, staff	Yes	ATH		I		S		A	R
D.5	Christian distinctiveness and SIAMs inspection process for Trust's church schools	Yes	AoA		A	S (EC)			S	R
D. 6		Yes	AoA				A	R		

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Ref	Delegations	Board delegated authority	Source	Members	Trust Board	Committee	LGBs	CEO/DCEO & Senior Exec		Heads
	Monitoring of Christian distinctiveness and ethos to assess how this is embedded within our church schools						Ethos Com.			
	Curriculum									
D.6	Design, review, monitor and develop Trust curriculum framework	Yes	DfE					A	R	C
D.7	Delivery of curriculum & assessment in line with Trust approach	Yes	DfE			I	S	A		R
D.8	Delivery of Early Years Foundation Stage (EYFS), in line with statutory requirements	Yes	DfE			I (EC)	S	A		R
D.9	Delivery of school careers programme, with regards to statutory requirements	Yes	DfE			I (EC)	S secondary schools only	A		R
D.10	Monitoring and challenge of Trust educational outcomes	Yes	DfE			A (EC)		R		
D. 11	Monitoring and challenge of School educational outcomes	Yes	DfE			S (EC)	S	R (health checks)	A	
	Behaviour & Attendance									
D.10	School reward & behaviour policies; review and agree	Yes	DfE			I (EC)	R	A		S
D.10b	School reward & behaviour policies; implement	Yes	DfE					A		R
D.11	Trust wide compliance with the statutory School Admissions Code including setting admission arrangements annually and accepting students in-year over PAN	No	Admissions Code & Admission Appeals Code		A		C	R		
D.12	Admissions and attendance registers kept in accordance with regulations and monitoring attendance rates and interventions	Yes	DfE			I (EC)	S	A		R
D.13	Statutory guidance followed in relation to suspensions and permanent exclusions (PEX)	Yes	Suspension & PEX Stat Guidance		A		S	S		R
				A		R				
				A			R			
D.14	Directing of pupils offsite Trust wide is compliant with the statutory guidance for Alternative Provision, Trust Policies and Admission Authority delegated approval where applicable	No	Alt. Provision, Suspension & PEX Admissions Code		A	I (EC)	S (via link visits re attendance and safeguarding)	R		
	School Organisation									
D.15	Annual update of Admissions policy approval incl. compliance with the consultation timeline where change is proposed	No	Admissions Code		A		C	R		C
D.16	Setting Term Dates	Yes			I		I	A	R	C
E) People										
E.1	Appoint/ remove CEO	No	ATH	I	A	R				
	Appoint/ Remove DCEO Appoint/Remove Senior Executive Members	Yes		I	C			A (CEO)	R (CEO)	
	A (CEO & DCEO)							R (CEO & DCEO)		
	Structure of Executive Team	Yes			C			A (CEO & DCEO)	R (CEO & DCEO)	

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Ref	Delegations	Board delegated authority	Source	Members	Trust Board		Committee	LGBs		CEO/DCEO & Senior Exec	Heads
	Headteacher Appointment	Yes	ATH		I			C	A	R	
E.2	Determination of Performance Management for CEO & DCEO	No	ATH		A	R					
E.3	Determination of Pay Ranges for CEO	No			A	R					
	Determination of Pay Ranges for DCEO				A	R			S (CEO)		
	Determination of Pay Ranges for Senior Executive				A	R			S (CEO & DCEO)		
E.4	Appeals against CEO decisions	No	ATH		A	R					
F) Compliance											
F.1	Compliance with equalities legislation	No	Law		A					R	
F.2	Compliance of Safeguarding Policy and associated procedures (incl. DBS checks and safer recruitment)	Yes	KCSiE				A (EC)	S		R	S
F.3	Nominating safeguarding lead and SEND lead Trustees	No	ATH		A	R					
	Designating Link Governors to required roles	Yes	ATH					A	R	I	C
F.4	Compliance with SEND Code of Practice	Yes	Code of Practice				I (EC)	S		A	R
F.5	Health & Safety policy, strategy and compliance with statutory regulations	No	Law		A					R	
F.6a	Managing Information Governance (incl. GDPR) Compliance	No	ATH & Law		A		S (A&RC)			R	
F.6b	Monitoring Information Governance (incl. GDPR) Compliance	No	ATH & Law		A		S (A&R)			R (Health Checks)	
F.7	Complaints policy, compliance and monitoring (including complaints made to OFSTED)	No	DfE		A		S (A&R)			R	
G) Related parties											
G.1	Fusion School Services (FSS): operational management and oversight – see FSS Articles and SoD for delegated responsibilities	Yes	FSS SoD						A	R	
									Fusion Executive		
G.2	Fusion school services: governance oversight – see FSS Articles and SoD for delegated responsibilities	No	FSS SoD		A	R	S (F&R)		R		
					Fusion Board				Fusion Executive		
G.3	South West Opportunities Fund (SWOF) – see Articles for further details which are compliant with Charity Law	No	SWOF Articles		A				R		
					SWOF Trustees				SWOF Executive		

6. Summary of Financial Authorisation Levels

Delegated Duty	Scope	Delegated Authority	Method	Review Period
Budget setting		Senior, School and Business Executive ¹	Agree improvement priorities for the coming year	Annual
		Headteacher	Draft a budget plan	Annual
		Director of Finance and Deputy CEO	Agree and recommend a budget plan to the Executive for the Finance & Resources Committee to review	Annual
		Finance and Resources Committee (F&R)	Recommend a draft budget to the Board for approval	Annual
Budget holders' responsibilities	As per the individual budgets set	Headteacher / Budget holder	Budget monitoring is the responsibility of the budget holder and budgets must not be overspent at any time during the year unless through prior agreement from the appropriate authorisation level (virement)	Monthly
Month end procedures		Director of Finance / Headteacher	All transactions to be processed and reconciled for the timely checking and production of monthly reports	Monthly
Variations to budget heads (virement)	Up to £20,000	Director of Finance and Headteacher (school budgets) / Executive Leader (central budgets)	Subject to consideration (one-time versus recurrent need), medium-term and corporate sustainability, link to improvement priorities	As necessary
	£20,001 - £50,000	As above, plus the Chief Executive Officer (CEO)	As above	As necessary
	Over £50,000	Trust Board Member (Chair, Vice Chair, Chair of Finance & Resources), Chief Executive, Deputy CEO and Director of Finance	As above	As necessary
Capital Budget and variations		Finance & Resources Committee to approve the detailed capital programme within the spending parameters agreed by the Board	To review proposals and agree the capital programme in line with need (health and safety, condition) and strategic priorities. Priorities are informed by strategy, condition surveys, energy/health and safety audits and the sustainability of the estate.	Half-termly
Capital: ad-hoc and emergency works	Up to £40,000.	Executive or Director of Finance. During holiday periods and / or emergency situations a member of the Executive can approve up to £40,000 independently.	Capital – projects are appraised on merit, therefore no formal virement process other than as above from revenue financing. (eg. To enhance a scheme or progress a project outside the single capital pot (SCA)).	As necessary

Senior Executive and Directors Group ^[1]

^[1] **Senior Executive:** CEO, Deputy Chief Executive, Executive Director of Education, Executive Director of People, Infrastructure & Innovation, Executive Director of Communications, Operations and Growth

Directors Group^[1]: CEO, Deputy Chief Executive, Executive Director of Education, Executive Director of Operations and Innovation, Directors of Education (x4), Director of Performance, Director of School Improvement, Director of the Ted Wragg Institute, Director of Finance, Director of People and Director of Infrastructure.

References to the 'Executive' include the above two bodies, and their members.

Delegated Duty	Scope	Delegated Authority	Method	Review Period
		Subsequent report to Finance and Resources through to the Board.		
Use of Reserves (limited to non-recurrent and capital projects only)	Subject to level of School balances	Finance & Resources Committee	Reserves held in excess of the target percentage (currently 5%) will be reviewed by the Senior Executive & Trustees on a regular basis. Reserve use is strictly by application, and for non-recurrent or capital purposes only. Applications will be invited bi-annually and subject to the Trust not falling below the 5% minimum threshold.	Bi-annual
Banking of cash and cheques	Any	Business Support Officer, School Finance Officer or delegated administrative assistant	Cash and cheques should be banked on a regular basis (at least fortnightly) and should not be allowed to accumulate above £3,000. Banking should be checked and agreed by another member of staff before being banked and should relate back to receipts issued.	As required
Reconciliation of bank accounts		Central Finance Team	Bank accounts should be reconciled at least on a monthly basis by someone other than the person doing the banking. Bank reconciliations should then be signed by the Assistant Director or Director of Finance or Finance Manager, dated and filed.	Monthly
Payment by cheque	Any	In accordance with the approved bank mandate (overseen by F&R)	Limited use only: e.g. parental refunds or infrequent supplier	As necessary
BACS Payments	Any	In accordance with the approved mandate (overseen by F&R)	Payment documentation reviewed. Two approvals required, with full audit trail. Release of payment must be separate to purchase approval documentation.	As necessary
Credit Card	Limited to £5,000 except with the prior authority of the Director of Finance or Assistant Director of Finance	Named cardholder	The cardholder must ensure all transactions are supported by a detailed VAT receipt. Payments should only be made by the cardholder in accordance with financial regulations Statements to be checked and signed by Line Manager	Monthly
Standing orders and direct debits	Any	As per BACS payments	As per BACS payments	As necessary
Petty Cash	£250 maximum. £50 on any one purchase	Director of Finance to agree petty cash maximum amount (which may be temporarily increased e.g. during Activities Week) Accountability rests with the Headteacher who may delegate responsibility to the School Finance Officer or member of the administrative team.	Limited to £50 on any one purchase (except with prior agreement) Valid till receipt or proof of payment is required VAT receipts must be obtained where practical Must not be used to purchase personal items Limits may be temporarily increased, e.g. for trips. Cross-referenced reconciliations are required monthly	Monthly

Delegated Duty	Scope	Delegated Authority	Method	Review Period
Investments		Director of Finance	<p>The Director of Finance is responsible for producing cashflow forecasts and for making decisions on investments, providing information to the Finance & Resources Committee and Board of Trustees for scrutiny. Prior to investment of funds, two authorised signatures will be required from:</p> <p>Director of Finance</p> <p>Assistant Director of Finance</p> <p>Finance Manager (limited to second signatory)</p>	Half-termly
Ordering goods and services (raising requisitions)	Up to £2,000	Accountability rests with the Headteacher or delegated budget holders	<p>Estimated Price</p> <p>Order from existing active suppliers where possible</p> <p>Orders should be approved before the order is placed with the supplier</p>	As necessary
	£2,000 to £10,000	As above	<p>Written quotation (two, preferably three, dependent on 'market-supply' and value), or Single Source Approval (SSA)</p> <p>Select approved supplier where available</p> <p>If Single Source Approval is required, this must be signed as agreed by the Head of Procurement or the Director of Finance</p>	As necessary
	£10,001 - £40,000	As above, with the oversight of Finance and Procurement.	<p>At least three competitive written quotations, or Single Source Approval signed by the Director of Finance or Head of Procurement.</p> <p>Save evidence of quotations (as required by the central finance function) to support requisition approval</p> <p>Nb. The requirement for 'capital / estates' is currently two quotations for up to £20,000. This is in response to limited suppliers for this type of work</p>	As necessary
	£40,001 to £100,000	As above. Requires a formal process led by the Procurement Team under the oversight of the Director of Finance-and Senior Executive.	<p>At least three competitive written quotations / tenders against a formal Request for Quotation / Tender Process</p> <p>Written contract required, signed by a Senior Executive Team member or Director of Finance.</p> <p>Single Source Approval requires the agreement of Senior Executive (Authorised nominees: CEO /Director of Finance acting jointly)</p>	As necessary
	£100,001 – Threshold levels under the Public	<p>As above. Formal process led by the Procurement Team under the oversight of the Director of Finance</p> <p>Spend must be authorised by the Finance & Resources Committee</p>	<p>Seek at least three competitive written quotations / tenders against a formal Request for Quotation / Tender Process</p> <p>Written contract required, signed by a Senior Executive member or Director of Finance.</p> <p>Single Source Approval requires the agreement of Finance & Resources Committee</p>	As necessary

Delegated Duty	Scope	Delegated Authority	Method	Review Period
	Contracts Regulations ² (currently £214,904 inclusive of VAT for supplies and services)			
	Above Procurement Thresholds	As above. Formal process led by the Procurement Team under the oversight of the Director of Finance Spend must be authorised by the Finance & Resources Committee. Documents must be overseen by legal and approved prior to advertisement	A compliant EU Tender process. You must consult with Procurement before any process is initiated or Contract created	As necessary
Signature: Contracts relating to acquisition or disposition of any interest in land		Chief Executive following approval by the Board of Trustees (subject to any necessary approvals of the DfE)		As necessary
Signature to Service Level Agreements / Contracts for other expenditure	Academy	Up to £10,000 – Headteacher or appropriate Head of Service / Director of Infrastructure		As necessary
	Academy or Trust-wide	Up to £40,000 – Head of Procurement or Director of Finance		As necessary
	Academy or Trust-wide	£40,000+ - Director of Finance or Senior Member of the Executive. During holiday periods and / or emergency situations a member of the Executive can approve up to £40,000 independently.	Orders placed by the Trust for goods and services over £40,000 must be subject to a written contract, authorised and signed by the Director of Finance or duly authorised deputy.	As necessary
Contracts for the engagement of staff or relating to conditions of employment or termination		Chief Executive Officer in the case of the Senior Executive, and in other cases in accordance with the Schedule of Authorised signatories	Employees need a contract on their first day. Any contract changes need to be authorised as per the appropriate authority level (appointment of staff) and filed in the staff members file. These contracts will be periodically checked by HR and auditors.	As necessary
Appointment of Staff	Chief Executive Officer	Board of Trustees		As necessary
	DCEO and Senior Executive members	CEO / DCEO		As necessary
	Headteachers	Senior Executive	The role has been included in the budget, will not cause a deficit and reflects a pre-approved role or replacement of existing capacity. Offer must follow the Establishment Control process	As necessary

Delegated Duty	Scope	Delegated Authority	Method	Review Period
	Business and Education Directors	Senior Executive	The role has been included in the budget, will not cause a deficit and reflects a pre-approved role or replacement of existing capacity. Offer must follow the Establishment Control process	As necessary
	Teaching and co-professionals	Headteacher (school staff)/ Director (Shared Services)	The role has been included in the budget, will not cause a deficit and reflects a pre-approved role or replacement of existing capacity. Offer must follow the Establishment Control process	As necessary
Pay Ranges to include TLRs	CEO, DCEO and Senior Executive pay scales Cost of living increases Pay and pay progression for CEO, DCEO and Senior Executive Kept informed about Headteacher Pay Ranges (group size and 7 point range)	Trust Board*	Follows a robust evidence-based process to ensure that salary is a reasonable and defensible reflection of the individual's role and responsibilities.	Annual
	Review and approve the grade for Education and Business Executive posts Review and approve pay progression for Education and Business Director Posts Review and approve Headteachers pay progression (sending to Trust Board for information)	Chief Executive Office/Deputy Chief Executive Officer	The range will be reviewed whenever there is a proposal to appoint a new postholder, where it becomes necessary to amend the Headteachers Group (because of a change in pupil numbers or where a post becomes responsible or accountable for more than one school on a permanent basis), or where it is necessary to reflect a significant change in responsibilities of the post.	As necessary
	Other staff	Headteacher / Executive Lead	Subject to budget and moderation through the Establishment, and Job evaluation. Market supplements may exceptionally be added where conditions require. Trust Pay Panel agreement required to market supplements.	As necessary
Pay Review	CEO, Headteachers, Senior Executive	Trust Board	As outlined in the pay policy. The CEO will moderate Headteachers' Pay recommendations and make pay recommendations to the Chairs Governance Committee	Annual
	Senior Professionals (Education and	Senior Executive		

Delegated Duty	Scope	Delegated Authority	Method	Review Period
	Business Directors Group)			
	Teaching	Directors of Education	Ratify and approve increments in accordance with normal progression.	Annual
	Support staff Central Support Staff	School Leadership Team Senior Executive	Support staff will receive their incremental progression annually. Progression on the NJC scales is automatic and may only be withheld where performance is being managed under the Capability policy	Annual
	Exceptional performance pay progression Moderate and approve Recruitment and Retention Payments/ Market Supplements Moderate Trust Threshold applications Pay Appeals	Trust Pay Panel (DCEO,-Director of Finance and Head of HR)	Pay Panel to ratify exceptional progression and ensure consistency across the Trust. Where postholder has demonstrated their performance has exceeded the expectations and where all objectives have been exceeded as part of an appraisal review, the postholder may apply for exceptional pay progression. Where the panel consider there is suitable evidence, early progression or an additional reference point on the relevant pay scale may be awarded.	As necessary
Severance payments	Up to £50,000 DfE consent required beyond this as noted	Chief Executive Officer to approve. A business case is required (signed by the CEO and Director of Finance -Where the non-contractual element is on or over £50,000, the prior approval of the DfE is required. Legal advice should be sought.	Severance payments must be made in line with the Academy Trust Handbook	As necessary
Compensation	Any	Headteacher / Executive lead with the oversight of the DCEO and Director of Finance and HR/Legal as appropriate. Oversight by Senior Executive. DfE prior approval required for payments in excess of £50,000.	Must be based on a careful appraisal, including legal advice where relevant, and ensure value for money. The Trust must disclose aggregate transactions for any amounts and as such, payments in excess of £1,000 will be overseen by the Senior Executive.	As necessary.
Ex gratia payments	Any	DfE consent required		As necessary
Payroll processing		Headteacher / Director of Finance	Headteacher to review schedule of payments against budget. The Director of Finance to review the monthly payroll process. All changes must be authorised and signed off by the Headteacher or the appropriate Executive lead (Senior, School or Business Executive).	Monthly

Delegated Duty	Scope	Delegated Authority	Method	Review Period
Authorisation of Overtime and Expenses	Any	Headteacher / Director of Finance is accountable, with responsibilities assigned through the Schedule of Authorised Signatories.	Must be agreed in advance Claims must be made monthly. Claims over three months' old will require the approval of the Director of Finance/ Assistant Director of Finance and must be supported by an explanation of the delay.	As necessary
Collection and receipt of cash and cheques	Any	Business Support Officer, School Finance Officer or delegated administrative assistant	Cash must be receipted by the person with delegated authority and recorded in the appropriate ledger. All on site cash and cheques must be locked in the safe until banking	Daily
Charging and remissions (Trips)		Accountability rests with the Headteacher (responsibility may be delegated)	A lead member of staff must be appointed for each trip to take responsibility for the collection of sums due. The lead teacher must prepare an activities trip costing to demonstrate consideration of costs and cost recovery (where appropriate), ensuring formal approval within the school. Trips should be run at cost price. If subsidised e.g. from the relevant department and / or pupil premium, this must be approved before the trip progresses.	As necessary
Lettings		Accountability rests with the Headteacher (responsibility may be delegated to the Premises Manager or other delegate) unless outsourced to Fusion School Services.	The Premises Manager or equivalent school designate is responsible for maintaining records of bookings (including the completion of a letting form) and for identifying the sums due from each organisation in accordance with standard pricing. Prices should be reviewed annually with the oversight of the central team and take account of the type of letting, costs and local market factors.	Annually
Sales invoices	Any	Accountability rests with the Headteacher (responsibility delegated)	Sales invoices to be raised within 30 days of the goods being supplied or services carried out. Where appropriate advice should be sought in relation to the appropriate charge-out rate (Finance), and GDPR implications (Quality and Compliance Coordinator).	As required
Write-off of bad debts including overpayments to staff	Up to £1,000	Headteacher / Executive Lead and Director of Finance	Recovery should always be pursued, including overpayments, or erroneous payments. Write-off should only be considered after all reasonable recovery action has been taken with the debtor, and insurers, and the authoriser is satisfied there is no feasible alternative.	Annual
	£1,000 to £5,000	Second signature required for write-offs in excess of £1,000 (Director of Finance or Senior Executive Team member)		
	£5,001+	Finance & Resources Committee		
	Over £45,000	DfE consent required		As necessary
Making of gifts	Approx £35	Budget holder with Line Manager approval	Ensure the value is reasonable, within the Gifts and Hospitality Policy, the decision is documented and achieves propriety and regularity in the use of public funds.	As necessary – register to be maintained

Delegated Duty	Scope	Delegated Authority	Method	Review Period
			Example: Flowers to a sick member where documented. Report transaction to the Director of Finance for registering	
Receipt of Gifts	Any	Director of Finance	Ordinarily such gifts should be rejected, unless they are of negligible value (e.g. diaries, calendars). Gifts or hospitality in excess of £25 must be reported to the Director of Finance in order to protect the individual receiving the gift. This is particularly important where the person receiving the gift is a budget holder or has the ability to influence purchasing decisions.	As necessary – register to be maintained
Acquisition or disposal of freehold land or buildings	Any	DfE agreement required		As necessary
Disposing of heritage assets	Any	DfE agreement required		As necessary
Other disposals	Trust has discretion	Headteacher (net book value up to £2,000) Oversight of the Director of Finance: (net book value up to £20,000) Finance and Resources: (net book value over £20,000)	Entry to be made on the fixed asset register showing the method of disposal and sales value. Due process should be followed including advertisement, inviting bids, negotiation on price mindful also of GDPR and licensing considerations. Disposal to staff is not encouraged.	Monthly and annual
Taking up any leasehold or tenancy agreement exceeding 7 years)	Any	DfE approval required		As necessary
Granting a leasehold or tenancy agreement of any duration	Any	DfE approval required.		As necessary
Fixed Asset Register		Director of Finance	All the items in the register should be permanently and visibly marked as the academy trust's property.	Annually
Consultants	Exceeding 9 months and/or £20,000	Senior Executive (subject to budget)		As necessary
Related party transactions	Any	Oversight of Director of Finance	Must be reported in advance of the contract or agreement, and prior approval and advice sought. Procurement guidance, 'at cost' provisions and documentation requirements must be adhered to.	As necessary (ongoing) Annual report to F&R in advance.
Novel, contentious and repercussive transactions	Any	DfE agreement required		As necessary
Taking up a finance lease	Any	DfE approval required		As necessary
Taking up an operating lease		Headteacher in liaison with the Director of Finance.	Subject to budget capacity. All leasing agreements must be reviewed and signed by a	As necessary

Delegated Duty	Scope	Delegated Authority	Method	Review Period
			Senior Executive member and included on the Trust's contract register.	
Borrowing	Any	DfE approval required		As necessary
DfE reporting		Director of Finance	As required by the DfE	As necessary to ensure compliance

7. Trust Policy Delegation

Policy Name	Policy Type	Statutory Y/N	Publish location	Approving Body	Reviewer	Policy Author	Review Cycle	Last approved	Scheduled for approval	Review and approval meetings 25/26
Accessibility Plan	School Template	N	S-Website	Senior Exec (template) Headteacher (final)	Education Directors Group	Director of Education - SEND	3 Years	Jul-23	May-26	EDG 4/5 Exec 18/5
Admissions Policy	School Template	Y	S-Website	Trust	Senior Exec	Local Authority	Annual	Feb-25	Feb-26	Exec 20/1 Trust 10/2
AI Guidance	Guidance	N	Staff Hub	Senior Exec	Business Directors Group	Director of Infrastructure	Annual	Jun-25	May-26	BDG 23/3 Exec 21/4
Animals in Schools guidance	Guidance	N	Staff Hub	Education Directors Group	Business Directors Group	TBC	Annual	Apr-25	Apr-26	BDG 23/3 EDG 21/4
Anti-bullying policy	Trust	Y	Website	Senior Exec (template) Headteacher (final)	Education Directors Group	Director of Inclusion	Annual	May-25	May-26	EDG 5/5 Exec 19/5
Anti-Fraud and Corruption	Trust	Y	Staff Hub	Committee - A&R	A&R Committee	Director of Finance	2 Years	Mar-25	Mar-27	
Attendance Policy	School Template	N	S-Website	Senior Exec (template) Headteacher (final)	Education Directors Group	Trust Leader for Safeguarding & Attendance	Annual	Jun-25	May-26	EDG 20/4 Exec 12/5
Behaviour Policy	School Template	Y	S-Website	Senior Exec (template) LGB (final)	Education Directors Group	Director of Inclusion	Annual	Jul-25	May-26	EDG 20/4 Exec 11/5
Behaviour Principles	Trust	Y	Website	Trust	Senior Exec	Director of Inclusion	2 Years	Feb-25	Feb-27	
Capability of Staff	Trust	Y	Staff Hub	Trust	Business Directors Group and Exec	Director of People	Annual	Mar-25	Mar-26	BDG 20/10 Exec 18/11 Trust 3/12
Careers Guidance	Trust	Y	Website	Senior Exec (template) Headteacher (final)	Education Directors Group	Director of Education - Careers	Annual	Jun-25	May-26	EDG 24/3 Exec 21/4
Charging and Remissions Policy	Trust	Y	Website	Senior Exec	Education Directors Group	Director of Finance	Annual	Feb-25	Feb-26	EDG 27/2 Exec 3/3
Code of Conduct	Trust	Y	Staff Hub	Senior Exec	Business Directors Group	Director of People	Annual	Jun-25	May-26	BDG 20/4 Exec 5/5
Collective Resourcing and Reserves	Trust	Y	Staff Hub	Trust	F&R Committee	Director of Finance	Annual	May-25	May-26	F&R 29/4 Trust 13/5
Collective Worship	Trust	N	S-Website	Senior Exec	Education Directors Group	Trust Leader for Ethos	2 Years	Jun-25	May-27	
Competitive Tendering Policy	Trust	Y	Website	Trust	F&R Committee	Director of Finance	2 years	Mar-24	Mar-26	F&R 11/3 Trust 13/5
Complaints Policy	Trust	Y	Website	Senior Exec	Business and Education Directors Groups	Compliance	annual	Jul-25	May-26	BDG 21/4 EDG 5/5 Exec19/5
Complaints/Concerns - Managing Unreasonable Behaviour Policy	Trust	TWT	Website	Senior Exec	Business Directors Group	Compliance	2 years	Jul-25	May-27	
Computer/Mobile Device Use and Online Policy - Staff	Trust	N	Staff Hub	Senior Exec	Business Directors Group	Director of Infrastructure	2 Years	Jun-25	Mar-27	
Computer/Mobile Device Use and Online Policy - Students	Trust	N	Website	Education Directors Group	Education Directors Group	Director of Infrastructure	2 years	Jun-25	May-27	
Conflict of Interest Policy (inc Register of interests)	Trust	Y	Website	Trust	Business Directors Group and Exec	Director of Finance	Annual	May-25	May-26	BDG 23/3 Exec 21/4 Trust 13/5

Responsibility for Review: Board of Trustees

Date of Approval: 03.12.2025

Policy Name	Policy Type	Statutory Y/N	Publish location	Approving Body	Reviewer	Policy Author	Review Cycle	Last approved	Scheduled for approval	Review and approval meetings 25/26
Debt Collection Arrangements: Childcare Settings	Trust		Staff Hub	Committee - F&R	F&R Committee	Director of Finance	2 Years	Sep-24	Sep-26	
Disciplinary Procedure	Trust	Y	Staff Hub	Senior Exec	Business Directors Group	Director of People	Annual	Feb-25	Feb-26	BDG 21/1 Exec 3/2
Early Careers Framework	Trust	Y	Website	Senior Exec	Senior Exec	Director Ted Wragg Teacher Training Partnership	Annual	Feb-25	Feb-26	Exec 3/2
Early Years Foundation Stage (EYFS) Policy	School Template	N	S-Website	Senior Exec (template) Headteacher (final)	Education Directors Group	Executive Director of Education	Annual	Jul-25	May-26	EDG 21/4 Exec 11/5
Equality Objectives	Trust	Y	Website	Trust	Senior Exec	Director of Education – Ted Wragg Institute	Annually	Nov-24	Nov-25	Exec 18/11 Trust 3/12
Exam Policy	School Template		S-Website	Senior Exec	Education Directors Group	Trust Leader for MIS	Annual	Nov-24	Nov-25	EDG 14/10 Exec 18/11
Exclusion	Trust	Y	Website	Senior Exec	Education Directors Group	Director of Inclusion	2 Years	Nov-24	Oct-26	
Executive Pay Report	Trust	Y	Website	Committee - F&R	F&R Committee	Director of Finance	Annual	Nov-24	Nov-25	F&R 19/11
Financial Regulations	Trust	Y	Staff Hub	Trust	F&R Committee	Director of Finance	2 Years	Oct-23	Oct-25	F&R 19/11 Trust 3/12
Fire Management	Trust	Y	Staff Hub	Trust	Business Directors Group	Head of Estates and Facilities	2 Years	Oct-23	Oct-25	BDG 10/11 Trust 3/12
First Aid In Schools Policy	School Template	Y	S-Website	Senior Exec (template) Headteacher (final)	Education Directors Group	Head of Estates and Facilities	Annual	Jun-25	May-26	EDG 20/4 Exec 11/5
Fraud Response Plan	Trust		Website	Committee - A&R	A&R Committee	Director of Finance	2 Years	Mar-25	Mar-27	
Gender Pay Gap	Trust	Y	Website	Committee - F&R	F&R Committee	Director of Finance	Annual	Nov-24	Nov-25	F&R 19/11
Gifts and Hospitality	Trust	N	Website	Committee - F&R	F&R Committee	Director of Finance	2 Years	Mar-25	Mar-27	
Grievance	Trust	Y	Staff Hub	Senior Exec	Business Directors Group	Director of People	Annual	Feb-25	Feb-26	BDG 20/1 Exec 3/2
Health & Safety Policy	Trust	Y	Website	Trust	Business Directors Group	Head of Estates and Facilities	Annual	Mar-25	Mar-26	BDG 21/4 Trust 13/5
Investment Policy	Trust	Y	Staff Hub	Trust	F&R Committee	Director of Finance	Annual	May-25	May-26	F&R 29/4 Trust 13/5
Lettings Policy	Trust	N	Website	Business Directors Group	Business Directors Group	Head of Estates and Facilities	Annual	Feb-25	Feb-26	BDG 24/2
Local Government Pension Scheme of Discretion Policy	Trust	N	Staff Hub	Senior Exec	Business Directors Group	Director of Finance	Annual	Feb-25	Feb-26	BDG 24/2 Exec 3/3
Lone Working Policy	Trust	N	Staff Hub	Business Directors Group	Business Directors Group	Head of Estates and Facilities	Annual	Oct-24	Oct-25	BDG 30/9
Management of Information Policy Suite (data protection, FOI, CCTV & Biometrics)	Trust	Y	Website	Senior Exec	Business Directors Group	Compliance	Annual	Nov-24	Nov-25	BDG 20/10 Exec 17/11
Minibus Policy	Trust	Y	Staff Hub	Business Directors Group	Business Directors Group	Director of Finance / Head of Estates and Facilities	Annual	May-25	May-26	BDG 19/5
Modern Slavery Statement	Trust	Y	Website	Committee - F&R	F&R Committee	Director of Finance	Annual	Nov-24	Nov-25	F&R 19/11
Pay Policy	Trust	Y	Staff Hub	Trust	Business Directors Group and Exec	Director of People	Annual	Jun-25	May-26	BDG 23/3 Exec 21/4 Trust 13/5
People Policy	Trust	Y	Staff Hub	Senior Exec	Business Directors Group	Director of People	2 Years	Jun-24	May-26	BDG 20/4 Exec 4/5

Policy Name	Policy Type	Statutory Y/N	Publish location	Approving Body	Reviewer	Policy Author	Review Cycle	Last approved	Scheduled for approval	Review and approval meetings 25/26
Photographic and Digital Images Policy	Trust	N	Website	Senior Exec	Education Directors Group	Director of Infrastructure	2 Years	Nov-23	Nov-25	EDG 21/11 Exec 2/12
Reasonable Force and Restrictive Interventions Policy	Trust		Website	Senior Exec	Education Directors Group	Director of Inclusion	2 Years	Jul-25	May-27	
Redeployment	Trust		Staff Hub	Senior Exec	Education Directors Group and Business Directors	Director of People	Annual	Jun-25	May-26	BDG 20/4, EDG 4/5 Exec 19/5
Restructure and redundancy Policy (combined)	Trust		Staff Hub	Senior Exec	Education Directors Group and Business Directors	Director of People	Annual	Jun-25	May-26	BDG 20/4, EDG 4/5 Exec 19/5
Related Party Transactions	Trust	Y	Staff Hub	Committee - F&R	F&R Committee	Director of Finance	Annual	Sep-24	Sep-25	F&R 24/9
Relationships & Sex Education Policy - Primary	School Template	Y	S-Website	Senior Exec (template) Headteacher (final)	Education Directors Group	Executive Director of Education	Annual	Jun-25	May-26	EDG 21/4 Exec 4/5
Relationships & Sex Education Policy - Secondary	School Template	Y	S-Website	Senior Exec (template) Headteacher (final)	Education Directors Group	PHSE Lead (Secondary)	Annual	Jun-25	May-26	EDG 21/4 Exec 4/5
Remote Education Policy	School Template	Y	S-Website	Senior Exec (template) HT (final)	Education Directors Group	Executive Director of Education	Annual	Jun-25	May-26	EDG 21/4 Exec 4/5
Risk Strategy & Management	Trust	Y	Staff Hub	Committee - A&R	A&R Committee - EXEC to review next year	Director of Finance	Annual	Jun-25	May-26	A&R 17/6
Safeguarding & Child Protection Policy	School Template	Y	S-Website	Trust	Education Committee and Exec	Trust Leader for Safeguarding & Attendance	Annual	Jul-24	Jul-26	EDG 2/6 Exec 16/6 Trust 17/7
Safeguarding statement (Trust)	Trust	Y	Website	Trust	Education Committee	Trust Leader for Safeguarding & Attendance	Annual	Dec-24	Sep-25	EDG 30/9 Trust 22/10
School Closure Statement	School Template	N	S-Website	Senior Exec (template) Headteacher (final)	Education Directors Group	Executive Director of Education	Annual	Jun-25	May-26	EDG 21/4 Exec 11/5
School Uniform Policy	School Template	Y	S-Website	Senior Exec Template LGB (final) * if changes proposed	Education Directors Group	Executive Director of Education	Annual	Jun-25	May-26	EDG 5/5 Exec 19/5
SEND Policy	Trust	Y	S-Website	Senior Exec (template) Headteacher (final)	Education Directors Group	Director of Education - SEND	Annual	Jun-25	May-26	EDG 21/4 Exec 19/5
Supporting pupils with medical conditions (includes medicines and health needs)	School Template	Y	S-Website	Senior Exec (template) Headteacher (final)	Education Directors Group	TBC	Annual	Jul-25	May-26	EDG 23/3 Exec 4/5
Travel & Expenses	Trust	N	Staff Hub	Senior Exec	Business Directors Group	Director of Finance	2 Years	Feb-25	Feb-27	
Trust password policy	Guidance	N	Staff Hub	Senior Exec	Business Directors Group	Director of Infrastructure	Annual		Oct-25	BDG 29/9 Exec 13/10
Whistleblowing	Trust	Y	Website	Trust	Business Directors Group and Exec	Director of People /Compliance	2 Years	Mar-25	Mar-27	