

Scheme of Delegated Authority

Date

February 2026

KEY

Level 0: Members

Level 1: Board of Directors/Trustees (BoD), or delegated Sub-Committee

Level 2: CEO/Accounting Officer

Level 3: Local Governing Body (LGB)

Level 4: A sub-group of the LGB

Level 5: Principal/Headteacher.

Note: Although decisions may be delegated, the Members as a whole remain responsible for any decision made under the scheme of delegation. Although the term 'academy' is used it should be noted that it is interchangeable with free school, school or any other educational organisation.

The Scheme of Delegated Authority (SoDA) is bespoke to each institution and is based on the assumption that an institution is currently rated a '1' or '2' in their most recent Ofsted inspection, or Exceptional, Strong or Expected Standard in the new framework. If an institution is a '3' or '4', Needs Attention or Urgent Improvement in the new framework, the Members or BoD have the right to remove this level of autonomy for the benefit of the overall trust.

Key Function	No	Tasks	Decision Level					
			0	1	2	3	4	5
Admissions	1	Agree Admissions Policy per academy		✓				
	2	Propose Admissions Policy per academy				✓		
	3	Agree academy Pupil Admission Number (PAN) annually		✓				
	4	Propose PAN annually				✓		
Central Services	5	Determine the scope of central services delivered by the MAT			✓			
	6	To ensure centrally provided services provide value for money			✓			
	7	To identify those additional services to be procured on behalf of individual academies						✓
Commercial Ventures	8	To approve any proposed commercial venture (of educational or non-educational character) within the trust		✓				
	9	To cease any commercial venture (of educational or non-educational character) within the trust		✓				
	10	To monitor the impact (educational and financial) of any commercial venture within the trust, e.g. subsidiary company			✓			
Curriculum	11	Approval of Curriculum Policy		✓				
	12	Propose and implement Curriculum Policy				✓		
	13	Responsibility for standards in Teaching and Learning						✓
	14	Approve a Relationships, Sex and Health Education (RHSE) Policy		✓				
			Decision Level					

Key Function	No	Tasks	0	1	2	3	4	5
Curriculum (continued)	15	Propose a RHSE Policy				✓		
	16	Arrangements for daily collective worship						✓
	17	Responsibility for ensuring provision of Religious Studies in line with curriculum and academy's religious designation				✓		
	18	Approve and monitor individual student targets						✓
	19	Accountability for individual student education and achievement				✓		
	20	Responsibility for individual student education and achievement						✓
Discipline and Exclusions	21	Approve Behaviour for Learning (BfL) Policy		✓				
	22	Propose and Implement BfL Policy				✓		
	23	Exclude a student for more than 15 days or permanently (Principal or can delegate to Vice Principal/Acting Principal if out of building)						✓
	24	Review exclusion upon appeal (Independent Panel)					✓	
	25	Direct reinstatement of excluded students				✓		
Extended Schools	26	To decide to offer additional activities (and what form these should take)					✓	
	27	To cease providing extended school provision					✓	
	28	To implement the additional services provided						✓
Finance	29	Approve trust budget plans for the financial year		✓				
	30	Approve academy budget for financial year				✓		
	31	Prepare the academy budget plan for the financial year						✓
	32	Monitor trust budget termly, via Finance Committee		✓				
	33	Monitor academy budget termly					✓	
	34	Monitor monthly expenditure of budget spend						✓
	35	To approve a Charging and Remissions Policy		✓				
	36	To propose a Charging and Remissions Policy				✓		
	37	To agree signatories for budget holders in each institution						✓
	38	To approve any trust virements and budget adjustments above £100,000		✓				
	39	To approve any trust virements and budget adjustments up to £100,000			✓			
	40	To approve academy virements and budget adjustments above £100,000		✓				

			Decision Level
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Key Function	No	Tasks	0	1	2	3	4	5
Finance (continued)	41	To approve academy virements and budget adjustments from £50,001 to £100,000			✓			
	42	To approve academy virements and budget adjustments from £25,001 to £50,000				✓		
	43	To approve academy virements and budget adjustments under £25,000						✓
	44	Approval to order goods/services above the value of £100,000 (with 3 written quotes). DfE approval may be needed, Public Procurement legislation will be adhered to.		✓				
	45	Approval to order goods/services between £50,001 and £100,000 (with 3 written quotes)			✓			
	46	Approval to order goods/services between £25,001 and £50,000 (with 3 written quotes)				✓		
	47	Approval to order goods, services and enter into contracts up to the value of £25,000 (3 written quotes required above £5,000)						✓
Governance	48	Approve changes to governance structures, Terms of Reference, Articles of Association or Funding Agreement		✓				
	49	Recommend changes to the trust's governance structure, Terms of Reference, Articles of Association and/or Funding Agreement			✓			
	50	Approve changes to the SoDA		✓				
	51	Recommend changes to the SoDA			✓			
	52	Approve requests from other schools to join the trust	✓					
	53	Recommend requests from other schools to join the trust		✓				
	54	Appoint the chair of the BoD	✓					
	55	Appoint the vice chair of the BoD		✓				
	56	Appoint the chairs of any trust sub-committees		✓				
	57	Appoint the chairs of the LGBs				✓		
	58	Elect the chairs of academy LGB committees				✓		
	59	Appoint the Clerk to LGB			✓			
	60	Recruitment of Governors			✓			
	61	Designate link governors as appropriate e.g. Pupil Premium, SEN/D etc				✓		
	62	Review performance of LGBs			✓			
	63	Suspend and/or dismiss members of LGB			✓			
	64	Set up Register of Business Interests for members	✓					
	65	Set up Register of Business Interests for directors		✓				

			Decision Level
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Key Function	No	Tasks	0	1	2	3	4	5
Governance (continued)	66	Set up Register of Business Interests for Governors				✓		
	67	Approve and set up Directors' Expenses Scheme		✓				
	68	Approve and set up LGB Expenses Scheme				✓		
	69	Appoint a Chief Executive Officer (CEO)/Accounting Officer		✓				
	70	Appoint Company Secretary		✓				
	71	Appoint external auditors for trust via Audit Committee		✓				
	72	Appoint internal auditors via Audit Committee		✓				
	73	To hold a Full BoD meeting at least six times in a school year (or more often if required)		✓				
	74	Approve applications for significant changes to an open academy	✓					
	75	Approve changes impacting the ethos and vision of the trust	✓					
Health and Safety	76	Approve academy Business Continuity Policy		✓				
	77	Monitor implementation of academy Business Continuity Plans				✓		
	78	Approve Health and Safety Policy (including Fire Evacuation Procedures)		✓				
	79	Propose and implement Health and Safety Policy (including Fire Evacuation Procedures)				✓		
	80	Approve a Risk Management Policy		✓				
	81	Propose and implement Risk Management Policy			✓			
Policies and practices	82	Approve all policies*		✓				
	83	Propose policies to the BoD*			✓			
	84	Monitor operation of policies				✓		
	85	Propose policies to the CEO/Accounting Officer				✓		
	86	Propose policies to the LGB						✓
	87	Provision of appropriate buildings and other insurance (including all liability cover)			✓			
	88	Develop and approve trust capital strategy			✓			
	89	Develop and approve academy maintenance strategy					✓	

			Decision Level					
Key Function	No	Tasks	0	1	2	3	4	5
Safeguarding	90	To approve a Safeguarding Policy			✓			
	91	To implement and monitor a Safeguarding Policy						✓
	92	Complete and maintain a Single Central Record						✓
	93	Appoint a safeguarding governor		✓		✓		
School Meals	94	Monitor and ensure school food standards are met				✓		
	95	Implement lunch nutritional standards						✓
	96	Ensure provision of Free School Meals to those students meeting the criteria						✓
School Organisation	97	Approve academy day, term dates and holidays			✓			
	98	Recommend academy day, term dates and holidays						✓
	99	Approve academy prospectus				✓		
	100	To prepare and publish the academy prospectus						✓
	101	Adoption and review of Home-Academy Agreement						✓
	102	Ensure each academy meets the minimum requirement of school days in a year				✓		
Staffing	103	Academy Headteacher/Principal appointments			✓			
	104	Appointment of trust staff who directly support the BoD			✓			
	105	Appoint senior leaders in academies						✓
	106	Attendance on panel for appointment of academy senior leaders				✓		
	107	Appointment of any other staff in academies						✓
	108	Approve changes to trust staffing structure			✓			
	109	Approve changes to academy staffing structure					✓	
	110	Propose changes to academy staffing structure						✓
	111	Performance review of the CEO		✓				
	112	Suspend/dismiss the CEO		✓				
	113	Approve pay scale of the CEO		✓				
	114	Performance review of Executive Principal and/or Principal at academy level			✓			
	115	Suspend/dismiss a trust staff member who directly supports the BoD			✓			
	116	Suspend/dismiss an academy Headteacher/Principal			✓			
	117	Suspension/dismissal of all academy staff (not including the Headteacher/Principal)						✓
			Decision Level					

Key Function	No	Tasks	0	1	2	3	4	5
Staffing (continued)	118	Approve any dismissal/severance/compensation payments			✓			
	119	Performance review of all academy staff (not including the Headteacher/Principal)						✓
Strategy	120	Approve and review progress of trust Improvement Plan / Strategy on a Page (SOAP)		✓				
	121	Approve and review progress of each academy improvement plan (AIP)				✓		
	122	Review progress across trust of all AIPs			✓			
	123	Approve and monitor trust Strategic Risk Register		✓				
	124	Approve and monitor each academy Operational Risk Register				✓		

**A list of all current Trinity MAT and Academy policies is provided in Appendix A (and copies of these policies are available from the relevant website). Where an academy is being incorporated into the trust then existing policies will remain in place until harmonisation with the trust and these will be available locally.*

For clarity and ease of communication, certain key policies are still included in the SoDA, e.g. Admissions, Charging and Remissions, Health and Safety and Relationships, Sex and Health Education.

Further notes:

Conflicts of Interests Procedures

- All members of staff or Governors that join the trust are asked to sign a declaration of business and pecuniary interests form prior to starting their role. Senior Leaders, Governors, Directors and Members complete a form annually and inform the Chief Financial Officer (CFO) if these interests change within the year. The CFO will collate new registers as required which align with the latest guidance/changes from the Department of Education (DfE).

Related Party Provisions

- All related party transactions (RPT's) are completed at arm's length, on an 'open-book' agreement and can only be completed as per DfE guidelines on an 'at cost' quote basis. For any contract spend above the DfE RPT limit (currently £40k), approval will be sought from the DfE prior to contract confirmation.

Outsourced Tendering Process

- If the trust outsources a tendering process to a third party it will only be done if it feels the level of skills and expertise would bring better knowledge about the requirements and more informed skillset regarding pricing negotiations. The Chief Financial Officer is ultimately responsible for deciding to outsource and will be the final decisionmaker on who to proceed the order with following informed meetings from the third party.

DfE consent

- The academy should seek confirmation from the DfE if it is ever unsure whether consent is required. Certain projects like capital investments, legislative consents and any planning permissions will be sought by the DfE if required also.

Three Quote Policy

- The Chief Financial Officer and the Accounting Officer of the Academy have the authority to overrule the three quote rule if three quotes cannot be identified due to the nature of the requirement (for example using the Times Educational Supplement to advertise teacher posts) or already committed services (for example building access, CCTV and intruder alarms, where choosing another provider would require a full building change).

General Data Protection Regulation (GDPR)

- The trust Data Protection Officer (DPO) shall be responsible for ensuring compliance with all applicable data protection laws and regulations, including but not limited to the General Data Protection Regulation (GDPR). Any contract or agreement involving the sharing of personal data must be reviewed and approved by the DPO prior to execution. The DPO shall have the authority to approve or require modifications to any contract or agreement related to data protection.

Policies

Statutory policies required by education legislation						
Name	Statutory or Recommended	Publish	Cycle between Reviews	Next Review	Owner (Trust or local academy)	Notes
Charging & Remissions	Statutory	Y	3 Years	Jan 2026	Trust	
Behaviour for Learning Policy (Student Behaviour)	Statutory	Y	Annual	July 2026	Local academy	
Relationship, Sex and Health Education	Statutory	N	Annual	July 2026	Local academy	
Special Educational Needs and Disability	Statutory	Y	Annual	March 2026	Trust	Overarching trust policy with local arrangements and information
Statutory policies required by other legislation						
Health & Safety (including Fire Evacuation)	Statutory	Y	Annual	Nov 2026	Trust	
Other statutory arrangements						
Accessibility Plan	Statutory	Y	3 Years	March 2026	Trust	Overarching trust policy with local arrangements and information
Financial Accounts	Statutory	Y	Annual		Trust	
Admission Arrangements	Statutory	Y	Annual	Nov 2026	Local academy	
Anti-Bullying Policy	Recommended	Y	3 Years	Sept 2026	Local academy	
Behaviour principles (written statement)	Statutory	Y	3 Years	Sept 2026	Local academy	
Child Protection and Safeguarding Policy	Statutory	Y	Annual	Sept 2026	Trust	Overarching trust policy with local arrangements and information
Complaints procedure	Statutory	Y	Annual	June 2026	Trust	
Curriculum policies/information	Statutory	Y	Annual	July 2026	Local academy	
Data Protection Policy	Statutory	Y	2 Years	Feb 2028	Trust	
Early Years Foundation Stage (EYFS)	Statutory	N	Annual	Sept 2026	Local academy	

Equality information and objectives (public sector equality duty) statement for publication	Statutory	Y	3 Years	Jan 2027	Trust	
Exclusion Arrangements/Policy	Statutory	Y	Annual	Sept 2026	Trust	
Exclusion Policy	Statutory	Y	Annual	Sept 2026	Trust	
Freedom of Information	Statutory	Y	3 Years	Nov 2028	Trust	
Governors Allowances	Recommended	N	3 Years	Sept 2027	Trust	
Governors information and papers	Statutory	Y	Governor Meeting Cycle	N/A	Local academy	
Premises management documents	Statutory	N	Preventative Maintenance Cycle	N/A	Local academy	
Pupil Premium policy (strategy)	Statutory	Y	Annual	Sept 2026	Local academy	
Pupil register and attendance	Statutory	N	School Day	N/A	Local academy	
Single Central Record	Statutory	N	Recruitment Cycle	Sample Audits Monthly	Local academy	Based on trust template
Supporting students with medical conditions	Statutory	N	Annual	Nov 2026	Trust	Statutory for KS1-KS4. Overarching Trust policy with local arrangements and information
Values and Ethos	Statutory	Y	3 Yearly	Nov 2027	Trust	Overarching Trust policy with local arrangements and information
Employment Policies						
Name	Statutory or Recommended	Cycle between Reviews	Next Review	Owner (Trust or local academy)	Notes	
Managing Allegations against staff	Statutory	Annual	Sept 2026	Trust		
Attendance Management policy	Recommended	3 Years	July 2026	Trust		
Capability policy	Statutory	4 Years	Sept 2027	Trust		
Dignity at Work	Recommended	3 Years	Dec 2026	Trust		
Disciplinary policy	Statutory	Annual	Mar 2026	Trust		
Equalities policy	Statutory	3 Years	Jan 2027	Trust		

Family Leave	Recommended	3 Years	July 2026	Trust	
Flexible Working policy	Recommended	3 Years	Sept 2027	Trust	
Grievance Policy	Statutory	Annual	Sept 2027	Trust	
Internships policy	Recommended	3 Years	Sept 2027	Trust	
Leave of absence policy	Recommended	3 Years	July 2026	Trust	
Managing Staff Reductions (Redundancy)	Recommended	3 Years	Mar 2027	Trust	
Pay Policy	Statutory	Annual	Sept 2026	Trust	
Performance Management (teachers & support)	Statutory	3 Years	July 2026	Trust	
Prevent Policy	Recommended	3 Years	July 2027	Trust	
Probation policy	Recommended	3 Years	Jan 2027	Trust	
Union recognition agreement	Recommended	3 Years	Jan 2028	Trust	
Employment procedures - forming professional expectations of employment					
Name	Statutory or Recommended	Cycle between Reviews	Next Review	Owner	Notes
Burgundy Book	Adopted	N/A	N/A	National document	
Cover and absence requests	Recommended	Annually	Sept 2026	Local	
CPD Policy	Recommended	3 Years	Sept 2027	Local	Local arrangements made within main policy
Recruitment and selection policy	Statutory	3 Years	Sept 2027	Trust	
Staff Code of Conduct	Statutory	Annual	Jul 2026	Trust	Amendments and insertions can be made to suit local arrangements
Acceptable use of ICT policy	Recommended	2 Years	Feb 2028	Trust	Local arrangements can be made within main policy
Volunteer Policy	Recommended	3 Years	Sept 2027	Trust	Amendments and insertions can be made to suit local arrangements
Whistleblowing policy	Statutory	3 Years	Sept 2028	Trust	
Working practices (info in staff planner)	Recommended	N/A	N/A	Local	Reviewed as part of producing the Staff Planner
Guidance on work placements	Recommended	3 Years	Dec 2029	Trust	Advice should be sought from local DSL
Keeping Children Safe in Education	Statutory	Annual	Sept 2026	National document	The local safeguarding lead should be familiar with this document. Any changes to policy should be led by trust Safeguarding Lead.

National terms and conditions for support staff ('Green Book')	Adopted	N/A	N/A	National document	For reference
WYPF Discretions Statement	Required	3 Years	Oct 2027	See notes	Requirement from WYPF