



Scheme of Delegated Authority

September 2026-August 2027

Trust Board Delegation to the Executive Team

The Trust's Board and its committees seek to ensure that the strategic direction of the Trust is appropriate and that the Trust is well managed. Trustees recognise that the Executive Team must have the flexibility to respond quickly to ensure that the best educational provision is always delivered. Decisions regarding appointing staff within Academy budgets and deploying central resources are the responsibility of the Executive and Headteacher teams. The Chief Executive has regular meetings with the Chair. Other Trustees who chair committees have regular meetings with the appropriate senior staff. The Scheme of Delegated Authority (SoDA) is reviewed annually.

Key for table below

Note: Throughout the document, where reference is made to an academy, this should be taken as referring to all of the academies within this Trust at that time.

Member: the members of The Priory Federation of Academies Trust

Trust: The Priory Federation of Academies Trust

Trust Board: The Board of Trustees

Ed&Standards: The Education and Standards Committee; a committee of the Trust

PP and O: The People, Performance and Operations Committee; a committee of the Trust

Finance: The Finance Committee; a committee of the Trust

Audit: The Audit Committee; a committee of the Trust

LGB: Local Governing Body of the Academy

CEO: Chief Executive Officer of the Trust

Headteacher: Headteacher of the Academy

Head of Setting: individual(s) responsible for Lincolnshire ITT and Priory Apprenticeships

CFO: Chief Financial Officer of the Trust

Governance

Notes	CFO	Headteacher/Head of Setting	CEO	LGB	Audit	Finance	PP and Ops	Ed&Standards	Trust Board	Members
Governance: Policies										
Agree the delegation of policy production and sign-off									*	
Review and approve Trust policies in accordance with the delegation of policies as listed at the end of this SoDA					*	*	*	*	*	
Manage the ongoing policy review process			*							
Review effectiveness of policy implementation				*					*	
Governance: Strategy										
Review and Approve Statement of Intent									*	
Review and Approve Values statement									*	
Review and Approve Trust SEF									*	
Review and Approve Trust Development Plan									*	
Review and Approve SoDA									*	
Review and Approve Academy SEF								*		
Review and Approve Academy Development Plan								*		
Review and Approve Trust Educational Targets								*		
Review and Approve Statutory Annual Accounts									*	
Review and Approve Annual Trust Report									*	
Appoint Trustees										*
Approve Trust governance and leadership meetings cycle									*	
Report to the Board/Members: the effectiveness of the LGB structure									*	

Notes	CFO	Headteacher/Head of Setting	CEO	LGB	Audit	Finance	PP and Ops	Ed&Standards	Trust Board	Members	
Governance: Committees											
Appoint/Dismiss Clerk to the Trust									*		
Appoint/Dismiss Clerk to the Trust's committees									*		
Appoint/Dismiss Clerk to the LGB									*		
Appoint Chair of the Trust									*		
Appoint Vice Chair of the Trust									*		
Appoint Chair of Trust committee									*		
Appoint Vice Chair of Trust Committee									*		
Appoint Chair of LGB									*		
Appoint Vice Chair of LGB									*		
Approve process for the appointment of LGB members		*		* Chair							
Review annually, through each Committee, the terms of reference of that committee and recommend changes to Board									*		
Review and appoint annually the membership of committees									*		
Review annually the constitution of committees									*		
Report committee business and delegated decisions to the Trust				*	*	*	*	*			

Staff

Notes	CFO	Headteacher/Head of Setting	CEO	LGB	Audit	Finance	PP and Ops	Ed&Standards	Trust Board	Members
Staff: Structures										
Approve Trust staffing structure							*			
Approve Academy staffing structure							*			
Staff: Appointment/Dismissal/Suspension										
Appoint, suspend, discipline or dismiss CEO									*	
Appoint, suspend, discipline or dismiss Headteachers			*							Deputy CEO in CEO's absence
Suspend all staff (except for the CEO)			*							Deputy CEO in CEO's absence
Appoint, discipline or dismiss Federation SLT			*							Deputy CEO in CEO's absence
Appoint, discipline or dismiss other Federation staff			*							Deputy CEO in CEO's absence
Appoint, discipline or dismiss Academy SLT		*								
Appoint, discipline or dismiss Academy teaching staff		*								
Appoint, discipline or dismiss Academy support staff		*								
Staff: Performance Management										
PM CEO							*			

Notes	CFO	Headteacher/Head of Setting	CEO	LGB	Audit	Finance	PP and Ops	Ed&Standards	Trust Board	Members
PM Headteachers			*							
PM Federation SLT			*							
PM other Federation staff			*							
PM Academy SLT		*								
PM Academy teachers		*								
PM Academy support staff		*								
Staff: Pay and Pay Progression										
Approve PP CEO							*			
Approve PP Headteachers							*			
Approve PP Federation SLT							*			
Approve PP other Federation staff			*							
Approve PP Academy SLT		*								
Approve PP Academy teachers		*								
Approve PP Academy support staff		*								
Approve the Pay Policy and annually review the CEO's salary							*			
Report to Board Cost of Living rise for teaching staff						*				
Report to Board Cost of Living rise for support staff						*				
Staff: Contracts										
Approve compromise/termination agreements up to £50,000 and report to PPHR & Finance			*							

Notes	CFO	Headteacher/Head of Setting	CEO	LGB	Audit	Finance	PP and Ops	Ed&Standards	Trust Board	Members
									*	
Approve compromise/termination agreements over £50,000 (DfE approval required if it is a non-contractual settlement)										
Manage contact with legal services (including Help Desk)			*							
Delegated to Head of HR		*								
Change contracts of employment (Academy staff)		*								
Change contracts of employment (Federation staff)			*							
Change contracts of employment for senior staff			*							
Change contract of employment for CEO									*	
Offer employment outside of approved forecast			*							
Offer of employment if differs from advertised post			*							

Safeguarding

Notes	CFO	Headteacher/Head of Setting	CEO	LGB	Audit	Finance	PP and Ops	Ed&Standards	Trust Board	Members	
Safeguarding											
Strategic responsibility for safeguarding across the Trust									*		Delegated to Trust DSL
Strategic responsibility for safeguarding within the academy		*									Delegated to Academy DSL
Review safeguarding compliance across all settings								*			
Carry out internal audits to seek assurance of compliance with statutory safeguarding guidance								*			Delegated to Trust DSL
Review external safeguarding audits to seek assurance of compliance with statutory safeguarding guidance					*						
Implement appropriate safeguarding training for all stakeholders								*			Delegated to Trust DSL
Ratify safeguarding policies								*			
Manage allegations and low-level concerns made against adults		*									Delegated to Trust DSL and Head of HR
Manage safeguarding policies and procedures		*									Delegated to Academy DSL
Follow safeguarding policies and procedures	*	*	*	*	*	*	*	*	*	*	All
Appoint Link Safeguarding Governor				*							
Responsibility for implementation and review of the Allergy Safety Policy								*			Delegated to Allergy Safety Lead (in each setting)

Operational

Notes	CFO	Headteacher/Head of Setting	CEO	LGB	Audit	Finance	PP and Ops	Ed&Standards	Trust Board	Members
Operational: Complaints										
Complaints relating to the CEO									*	
Complaints relating to Central Services Staff			*							
Complaints relating to the Headteacher			*							
Complaints relating to Academy Staff		*								
Complaints relating to the Local Governing Body (LGB)		*								
Operational: Risk Register										
Review Trust level risk register					*					
Review Academy level risk register					*					
Operational responsibility for Trust Risk Registers	*									
Operational responsibility for Academy Risk Registers		*								
Operational: Health and Safety										
Operational responsibility for H&S			*							
Review and report on the effectiveness of H&S management and compliance					*					
Operational: Site and Buildings										

Notes	CFO	Headteacher/Head of Setting	CEO	LGB	Audit	Finance	PP and Ops	Ed&Standards	Trust Board	Members
Provide appropriate Insurance			*							
Establish and Review the effectiveness of Procurement/Capital development plans						*				
Arrange for the security of buildings, furniture, equipment, stock, stores and cash.			*							
Maintain an inventory of all moveable items of equipment and security mark these items.			*							
Check the inventory annually to verify the location and condition of each item of equipment.			*							
Maintain a record of all property borrowed by staff.			*							
Review insurance cover in the light of risk assessment.			*							
Ensure adequate Business Continuity Plan is operated			*							
Review Critical Incident and Business Continuity Plan (CIBCP)					*					
Operational: IT Infrastructure										
Review the IT development plan						*				
Produce and manage the ICT development plan and disaster recovery plans			*							
Control systems, security and privacy of data.			*							
Register and ensure compliance under Data Protection legislation (2018 law onwards)			*							
Review disaster recovery plan (stand-alone and CIBCP annex)					*					

Finance

Notes	CFO	Headteacher/Head of Setting	CEO	LGB	Audit	Finance	PP and Ops	Ed&Standards	Trust Board	Members
Finance										
Adhere to all financial legal requirements including: the Companies Act 2009, appropriate SORPS, HMRC rules, Academy Trust Handbook, DfE Accounts Directive, and the Academies Funding Agreement	*									
Oversee the preparation of the annual budget plan and ensure that it links to the priorities established in the development plans	*									
Approve the first formal budget plan each financial year, including proposed capital projects									*	
Notify the approved budget to the DfE using the agreed timescale	*									
Review the Trust's actual financial performance throughout the year including the latest forecast position					*					
Review the financial position at the end of the financial year					*					
Approve cumulative monthly budget virements over 0.5% GAG	*									
Approve cumulative monthly budget virements under 0.5% GAG		*								
Set aside funds in short-term or long-term investments in line with Trust policy	*									

Notes	CFO	Headteacher/Head of Setting	CEO	LGB	Audit	Finance	PP and Ops	Ed&Standards	Trust Board	Members	
	*										Provide reconciled bank statements for inspection by the auditor
	*										Maintain a record of all cash holdings in the academy
	*										Render accounts promptly. Receipt and bank promptly all incomes intact. Refuse to cash personal cheques. Record cash passed from one person to another
	*										Administer voluntary funds
	*										Certify pay documents and other time records
											Finance: Assets
									*		Acquire assets (Freehold or Leasehold, Land and Buildings) subject to all necessary DfE approvals
									*		Dispose of assets (Freehold or Leasehold, Land and Buildings) subject to all necessary DfE approvals
	*										Dispose of assets/inventory (not land or buildings) NBV up to £1,000 value
					*						Authorise the disposal of unusable or obsolete equipment or assets with NBV above £1,000
											Finance: Lease with DfE's prior approval
					*						Enter into Finance Lease agreements within financial limits
					*						Grant and report on leasehold agreements on land or property

Notes	CFO	Headteacher/Head of Setting	CEO	LGB	Audit	Finance	PP and Ops	Ed&Standards	Trust Board	Members
Take up a leasehold on land or property for 3 years or more; or rent to time limits									*	
Finance: Borrowing with DfE's prior approval										
Enter into and report to Board guarantees, letters of credit or Indemnities above £45k per transaction or £250k per annum						*				
Enter into guarantees, letters of credit or Indemnities up to £45k per transaction or £250k per annum						*				
Responsible for all borrowing (including overdraft) limits						*				
Finance: Write-off										
Write off debts above £250,000										DfE
Write off all debts above £1,000 up to £45,000 (or £250,000 cumulative value)						*				
Write off debts below £1,000										*
Finance: Procurement										
Ensure all payments adhere to contractual commitments, verify the accuracy of invoice and payment details and ensure a secure audit trail and storage of documents in line with HMRC guidelines										*
Authorise purchases <£10,000										Budget Holder

Notes	CFO	Headteacher/Head of Setting	CEO	LGB	Audit	Finance	PP and Ops	Ed&Standards	Trust Board	Members
Authorise purchases >=£10,000 and <£20,000		*								
Authorise purchases >=£20,000 and <£50,000	*									
Authorise purchases >=£50,000					*					
Approve applications for Business/Credit cards					*					
Set up and use new suppliers with an annual spend of over £5,000	*									
Responsible for relevant related party transactions in line with DfE requirements					*					
Finance: Compliance										
Notify the Trustees of any significant changes affecting the Trust's financial outlook such as Pay & Pension effects and Government funding levels	*									
Ensure compliance with the Trust's Expenses policy, Gifts and Hospitality policy and Finance Manual	*									
Authorise overtime claims										Line Manager
Finance: Audit										
Ensure records and documents are made available as appropriate for inspection by the auditor	*									
Implement recommendations arising from an inspection audit			*							

Notes	CFO	Headteacher/Head of Setting	CEO	LGB	Audit	Finance	PP and Ops	Ed&Standards	Trust Board	Members
Review Internal and External Audit reports and any associated management letters and management responses, both committees required					*					
Report to the Trust with audit recommendations and management response					*					
Adopt and promote a Whistleblowing policy									*	
Maintain a register of pecuniary and business interests for Staff and Trustees via the Clerk to the Trust									*	
Recommend to the Trust the appointment of an independent External and/or Internal Auditor					*					
Approve audited annual accounts after review by the Finance and Audit committees in line with their terms of reference									*	
Consider impact and implications of all financial irregularities					*					
Review and adopt the Risk Register following its annual update					*					
Notify DfE, Board and Audit Committee of theft, fraud or irregularity over £5,000			*							

Education

Notes	CFO	Headteacher	CEO	LGB	Audit	Finance	PP and Ops	Ed&Standards	Trust Board	Members
Education: Curriculum										
Review and approve the curriculum offer								*		
Manage the curriculum offer (within statutory guidelines)		*								
Education: Admissions										
Review and approve admissions arrangements								*	*	
Manage admissions arrangements and appeals		*								
Decide on requests for admission to a year group other than that linked to a pupil's chronological age				*						
Education: Pupil Behaviour										
Review and quality assure the use of exclusions								*		
Suspend a pupil on a fixed-term basis		*								
Exclude a pupil permanently		*								
Review the Headteacher's exclusion decision				*						
Reinstate a pupil following a suspension or permanent exclusion				*						
Commission an Alternative Provision placement		*								
Direct a pupil's education off-site		*								
Review a pupil's placement at Alternative Provision or an alternative educational establishment		*								

Notes		CFO	Headteacher	CEO	LGB	Audit	Finance	PP and Ops	Ed&Standards	Trust Board	Members	
	Education: Target Setting											
	Review and Approve Educational targets								*			
	Monitor pupil progress		*									
	Report pupil progress to the Trust Standards Committee		*									
	Review pupil progress: commission intervention								*			
	Education: Disadvantaged Pupils											
	Write the Disadvantaged report		*									
	Review and Approve the Disadvantaged report								*			
	Manage the Disadvantaged funding		*									
	Provide free school meals for pupils meeting the criteria		*									
	Education: SEND											
	Review and approve all SEND arrangements/policy								*			
	Manage SEND arrangements		*									
	Appoint SEND link governor				*							
	Education: Teaching											
	Setting of expectations for the quality of teaching								*			
	Monitor and report on effectiveness of teaching over time									*		
	Monitor and report on effectiveness of the Teacher Profile									*		

Notes	CFO	Headteacher	CEO	LGB	Audit	Finance	PP and Ops	Ed&Standards	Trust Board	Members
Manage and report on Trust-level CPD								*		
Review the effectiveness of Teaching and CPD and commission intervention								*		
Education: General										
Set the times of academy sessions								*		
Set the dates of academy terms and holidays								*		
Adopt the Priory Contract		*								
Arrange collective worship		*								
Decide the curriculum for each year group		*								
Ensure the curriculum is varied to match the needs of specific groups of pupils, including those with SEND		*								
Decide on variations to the curriculum that involve a pupil moving to a year group other than that linked to their chronological age (or back to this year group).				*						
Ensure all aspects of the curriculum (including RE, PSHMRE, etc.) comply with national requirements and those in the academy's funding agreement								*		

Policy Schedule for The Priory Federation of Academies Trust

Policy area	Policy title	Committee responsible	Review cycle
FINANCE			
	16-19 Bursary Fund Policy	Finance	One year
	Anti-Fraud, Corruption and Bribery	Finance	Three years
	Business Travel and Expenses	Finance	Two years
	Discretionary Policy	Finance	Three years
	Gifts and Hospitality	Finance	Two years
	Trust Reserves	Finance	Two years
HEALTH & SAFETY			
	Allergy Safety	People, Performance & Operations	One year
	Critical Incident and Business Continuity Plan	Audit	One year
	First Aid	People, Performance & Operations	Three years
	Health & Safety	People, Performance & Operations	One year
	Home Visits	People, Performance & Operations	Three years
	Lone Working	People, Performance & Operations	Three years
	Medical Treatment	People, Performance & Operations	Two years
	No Smoking and Vaping	People, Performance & Operations	Three years
	Transport and Vehicles	People, Performance & Operations	Three years

HUMAN RESOURCES			
	Adverse Weather and Travel Disruption	People, Performance & Operations	Three years
	Allegations of Abuse Against Staff	People, Performance & Operations	Three years
	Annual and Special Leave and Absence Reporting	People, Performance & Operations	Three years
	Appraisal Policy for Teaching Staff, CEO and Trust Executive Management Staff	People, Performance & Operations	One year
	Capability Policy for Teaching Staff, CEO and Trust Executive Management Staff	People, Performance & Operations	One year
	Clear Desk	People, Performance & Operations	Three years
	Code of Conduct	People, Performance & Operations	One year
	Complaints	People, Performance & Operations	Three years
	Data Breach	People, Performance & Operations	Three years
	Data Protection	People, Performance & Operations	Three years
	DBS	People, Performance & Operations	One year
	Emotional Health, Wellbeing and Welfare (Staff)	People, Performance & Operations	Three years
	Equality, Diversity and Inclusion (Staff)	People, Performance & Operations	Three years
	Flexible Working	People, Performance & Operations	Three years
	Grievance	People, Performance & Operations	Three years
	Homeworking	People, Performance & Operations	Three years
	Low-Level Concerns	People, Performance & Operations	Three years
	Maternity, Paternity, Adoption, Parental and Shared Parental Leave	People, Performance & Operations	One year
	Menopause	People, Performance & Operations	Three years
	Moving and Handling	People, Performance & Operations	Three years
	Neonatal Care Leave and Pay	People, Performance & Operations	Three years

	Positive Handling and Safe Touch	People, Performance & Operations	Two years
	Records Management	People, Performance & Operations	One year
	Recruitment and Selection	People, Performance & Operations	Three years
	Redundancy	People, Performance & Operations	Three years
	Reference	People, Performance & Operations	Three years
	Retirement	People, Performance & Operations	Three years
	Safeguarding Supervision	Education & Standards	Three years
	Social Media (Staff)	People, Performance & Operations	Three years
	Staff Anti-Bullying and Harassment	People, Performance & Operations	Three years
	Staff Communication	People, Performance & Operations	Three years
	Staff Disciplinary	People, Performance & Operations	Three years
	Staff Sickness Absence	People, Performance & Operations	Three years
	Support Staff Appraisal	People, Performance & Operations	Three years
	Support Staff Capability	People, Performance & Operations	Three years
	Teachers' Pay	People, Performance & Operations	One year
	Time Off for Dependants	People, Performance & Operations	Three years
	Whistleblowing	People, Performance & Operations	Two years
ICT			
	Acceptable Use (ICT)	People, Performance & Operations	Three years
	CCTV	People, Performance & Operations	Three years
	Cyber Security	People, Performance & Operations	One year
	Online Safety (Staff)	Education & Standards	One year
	Online Safety (Pupils)	Education & Standards	One year
LINCOLNSHIRE ITT			
	Complaints	Education & Standards	Three years
	Application and Academic Appeals	Education & Standards	Three years
	Recruitment and Selection	Education & Standards	One year
	Attendance and Absence	Education & Standards	Three years

STUDENT WELFARE			
	Anti-Bullying	Education & Standards	Two years
	Attendance	Education & Standards	One year
	Charging and Remissions	Education & Standards	Three years
	DofE Expedition	Education & Standards	Three years
	Educational Visits	Education & Standards	Three years
	Equality, Diversity and Inclusion (Pupils & Parents/Carers)	Education & Standards	Three years
	Freedom of Speech & Expression	Education & Standards	Three years
	Intimate Care	Education & Standards	Two years
	LAC and Post-LAC	Education & Standards	One year
	Misuse of Drugs	Education & Standards	Two years
	Parental Communications and Complaints	Education & Standards	Three years
	Relationship Education, Relationship and Sex Education and Health Education	Education & Standards	Three years
	Safeguarding Adults	Education & Standards	One year
	Safeguarding and Child Protection	Education & Standards	One year
	Student Behaviour and Discipline	Education & Standards	Two years
	Student Wellbeing	Education & Standards	Three years
TEACHING & LEARNING			
	Access to Fair Assessment	Education & Standards	Three years
	Admissions	Education & Standards	One year
	Appeals (Exam and Qualification Grades)	Education & Standards	Three years
	Careers Guidance	Education & Standards	Three years
	Conduct and Administration of Exams	Education & Standards	Three years

	Conflict of Interest (Examinations)	Education & Standards	Three years
	Curriculum, Teaching and Assessment	Education & Standards	One year
	Early Career Teacher	Education & Standards	One year
	Non-Examination Assessment	Education & Standards	Three years
	SEND	Education & Standards	One year
	Special Consideration and Reasonable Adjustment	Education & Standards	Three years
	Word Processor	Education & Standards	Three years
TECHNICAL			
	Apprenticeship Registration & Certification	Education & Standards	Three years
	Recruitment and Initial Assessment of Apprentices	Education & Standards	Three years
	Technical Assessment	Education & Standards	Two years
	Technical Distance and Blended Learning	Education & Standards	Three years
	Technical Learner and Employer Compliments and Complaints Policy	Education & Standards	Three years
	Technical Placement	Education & Standards	Three years
	Technical Recognition of Prior Learning	Education & Standards	Two years
	Technical Registration & Certification	Education & Standards	Two years
	Technical Staff Malpractice and Maladministration	Education & Standards	Two years