



Scheme of Delegated Authority

September 2025-August 2026

Trust Vision

1. To develop successful Trust hubs in the wider Lincoln and Grantham areas that offer high quality:
 - Special, Primary and Secondary education
 - Post-16 programmes and apprenticeships
 - Initial Teacher Training and Teaching School provision.
2. To use the Maximising Performance programme to focus the Trust's strategies on improving the quality of education.
3. To have a clear and transparent governance structure that supports the objects of the Trust.
4. To use the Maximising Effectiveness programme to provide high quality career-stage professional development for all staff.
5. To provide expert central services offering appropriate and professional support through effective and sustainable relationships.
6. To use the Maximising Learning programme to monitor and improve teaching, learning, assessment and the curriculum.
7. To deliver a Priory Values programme of cultural, community, health, sporting and leadership events across the Trust.
8. To develop a Priory Baccalaureate award that:
 - Rewards pupils who embody the values of the Trust
 - Recognises all that is good about a pupil
 - Provides access to well-considered and highly regarded accreditation at each phase.
9. To ensure that all pupils, including the most vulnerable:
 - Achieve in line with or above expectations
 - Attend in line with or above national levels
 - Progress successfully on to the next stage of their lives.
10. To be a first-choice destination for families, pupils and staff.

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 delivered at all times. 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 HR: The Pay, Performance and Human Resources 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

CFO: Chief Financial Officer of the Trust

Notes	CFO	Headteacher	CEO	LGB	Audit	Finance	PP and HR	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										*	
Receive Annual Review of Governance										*	
Approve Trust governance and leadership meetings cycle									*		
Report to the Board/Members: the effectiveness of the LGB structure											

Notes	CFO	Headteacher	CEO	LGB	Audit	Finance	PP and HR	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 CC									*		
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 CC									*		
Appoint Vice Chair of CC									*		
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				*	*	*	*	*			

Notes	CFO	Headteacher	CEO	LGB	Audit	Finance	PP and HR	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							*			
Appoint, suspend, discipline or dismiss Federation SLT			*							
Appoint, suspend, discipline or dismiss other Federation staff			*							
Appoint, suspend, discipline or dismiss Academy SLT		*								
Appoint, suspend, discipline or dismiss Academy teaching staff		*								
Appoint, suspend, discipline or dismiss Academy support staff		*								
Staff: Performance Management										
PM CEO							*			
PM Headteachers			*							
PM Federation SLT			*							
PM other Federation staff			*							
PM Academy SLT		*								

Notes	CFO	Headteacher	CEO	LGB	Audit	Finance	PP and HR	Ed&Standards	Trust Board	Members
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			*							
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)										Head of HR
Change contracts of employment (Academy staff)		*								

Notes		CFO	Headteacher	CEO	LGB	Audit	Finance	PP and HR	Ed&Standards	Trust Board	Members	
	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			*								
	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 and Safeguarding											
	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				*							

Notes	CFO	Headteacher	CEO	LGB	Audit	Finance	PP and HR	Ed&Standards	Trust Board	Members	
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		*									
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				*							
Education: Target Setting											
Review and Approve Educational targets								*			
Monitor pupil progress		*									

Notes		CFO	Headteacher	CEO	LGB	Audit	Finance	PP and HR	Ed&Standards	Trust Board	Members	
	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: DSEN											
	Review and approve all DSEN arrangements/policy								*			
	Manage DSEN arrangements		*									
	Appoint DSEN 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									*		
	Manage and report on Trust-level CPD									*		
	Review the effectiveness of Teaching and CPD and commission intervention								*			

Notes	CFO	Headteacher	CEO	LGB	Audit	Finance	PP and HR	Ed&Standards	Trust Board	Members
Education: General										
Set the times of academy sessions								*		
Set the dates of academy terms and holidays								*		
Adopt the Trust's Home-Academy agreement		*								
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								*		
Operational: Complaints/Grievance										
Complaints relating to the CEO									*	
Complaints relating to Central Services Staff			*							
Complaints relating to the Headteacher			*							
Stage One (non-Headteacher related)		*								
Stage Two				*						
Stage Three									*	

Notes	CFO	Headteacher	CEO	LGB	Audit	Finance	PP and HR	Ed&Standards	Trust Board	Members
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										
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.			*							

Notes	CFO	Headteacher	CEO	LGB	Audit	Finance	PP and HR	Ed&Standards	Trust Board	Members
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										
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										*

Notes	CFO	Headteacher	CEO	LGB	Audit	Finance	PP and HR	Ed&Standards	Trust Board	Members
Capital projects still subject to tender approval process.									*	
	*									
					*					
					*					
Forecast vs budget					*					
Forecast vs budget									*	
Forecast vs budget	*		*							
Forecast vs budget					*					
	*									
	*									
	*									
	*									
	*									

Notes	CFO	Headteacher	CEO	LGB	Audit	Finance	PP and HR	Ed&Standards	Trust Board	Members
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					*					
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					*					

Notes	CFO	Headteacher	CEO	LGB	Audit	Finance	PP and HR	Ed&Standards	Trust Board	Members
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	*									
Change in supplier contractual terms with remuneration, payment terms, indemnity, liability, warranty or force major impacts	*									
Long term contract commitment up to 3 years	*									
Long term contract commitment over 3 years and finance limit for Trust						*				
Authorise purchases below £10,000	*									
Authorise purchases from £10,000 and below £20,000	*	*								
Authorise purchases of £20,000 and above (CFO approves in system on behalf of Finance Committee)						*				

Notes	CFO	Headteacher	CEO	LGB	Audit	Finance	PP and HR	Ed&Standards	Trust Board	Members	
Signing/renewing contracts are subject to purchase approval limits	*										Authorise all purchases for in-budget "recurring operating expenditure" (e.g. utilities, waste disposal)
						*					Authorise all tender recommendations above £20,000 (still subject to project being in budget or with appropriate authorisation if not in budget)
						*					Authorise any real or expected overspends on a capital project
Still subject to further tender approval						*					Authorise any non-budgeted capital project above £20,000 from academy reserves
Still subject to further tender approval									*		Authorise any non-budgeted academy capital project above £50,000 from academy reserves
Still subject to further tender approval									*		Authorise any non-budgeted capital project not funded fully by academy reserves (any value)
	*										Make all payments using the Trust's bank accounts (2 formal signatories required, one being CFO where possible, other from authorised list held by bank)
						*					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

Notes	CFO	Headteacher	CEO	LGB	Audit	Finance	PP and HR	Ed&Standards	Trust Board	Members	
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			*								
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					*						

Notes	CFO	Headteacher	CEO	LGB	Audit	Finance	PP and HR	Ed&Standards	Trust Board	Members	
									*		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

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			
	Critical Incident and Business Continuity Plan	Audit	One year
	First Aid	Pay, Performance & HR	Three years
	Health & Safety	Audit	One year
	Home Visits	Pay, Performance & HR	Three years
	Lone Working	Pay, Performance & HR	Three years
	Medical Treatment	Pay, Performance & HR	Two years
	No Smoking and Vaping	Pay, Performance & HR	Three years
	Transport and Vehicles	Pay, Performance & HR	Three years
HUMAN RESOURCES			
	Adverse Weather and Travel Disruption	Pay, Performance & HR	Three years
	Allegations of Abuse Against Staff	Pay, Performance & HR	Three years
	Annual and Special Leave and Absence Reporting	Pay, Performance & HR	Three years
	Appraisal Policy for Teaching Staff, CEO and Trust Executive Management Staff	Pay, Performance & HR	One year
	Capability Policy for Teaching Staff, CEO and Trust Executive Management Staff	Pay, Performance & HR	One year

	Clear Desk	Pay, Performance & HR	Three years
	Code of Conduct	Pay, Performance & HR	One year
	Complaints	Pay, Performance & HR	Three years
	Data Breach	Pay, Performance & HR	Three years
	Data Protection	Pay, Performance & HR	Three years
	DBS	Pay, Performance & HR	One year
	Emotional Health, Wellbeing and Welfare (Staff)	Pay, Performance & HR	Three years
	Equal Opportunities and Diversity (Staff)	Pay, Performance & HR	Three years
	Flexible Working	Pay, Performance & HR	Three years
	Grievance	Pay, Performance & HR	Three years
	Homeworking	Pay, Performance & HR	Three years
	Low-Level Concerns	Pay, Performance & HR	Three years
	Maternity, Paternity, Adoption, Parental and Shared Parental Leave	Pay, Performance & HR	One year
	Menopause	Pay, Performance & HR	Three years
	Moving and Handling	Pay, Performance & HR	Three years
	Neonatal Care Leave and Pay	Pay, Performance & HR	Three years
	Positive Handling and Safe Touch	Pay, Performance & HR	Two years
	Records Management	Pay, Performance & HR	One year
	Recruitment and Selection	Pay, Performance & HR	Three years
	Redundancy	Pay, Performance & HR	Three years
	Reference	Pay, Performance & HR	Three years
	Retirement	Pay, Performance & HR	Three years
	Safeguarding Supervision	Education & Standards	Three years
	Social Media (Staff)	Pay, Performance & HR	Three years
	Staff Anti-Bullying and Harassment	Pay, Performance & HR	Three years
	Staff Communication	Pay, Performance & HR	Three years

	Staff Disciplinary	Pay, Performance & HR	Three years
	Staff Sickness Absence	Pay, Performance & HR	Three years
	Support Staff Appraisal	Pay, Performance & HR	Three years
	Support Staff Capability	Pay, Performance & HR	Three years
	Teachers' Pay	Pay, Performance & HR	One year
	Time Off for Dependants	Pay, Performance & HR	Three years
	Whistleblowing	Pay, Performance & HR	Two years
ICT			
	Acceptable Use (ICT)	Pay, Performance & HR	Three years
	Artificial Intelligence	Education & Standards	One year
	CCTV	Pay, Performance & HR	Three years
	Cyber Security	Pay, Performance & HR	One year
	Online Safety (Staff)	Education & Standards	One year
	Online Safety (Pupils)	Education & Standards	One year
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
	Equal Opportunities & Diversity (Students)	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