The Epping Forest Schools Partnership Trust Scheme of Delegation

Effective from September 2026

Introduction

The Scheme of Delegation sets out the delegated powers between the different bodies involved in the governance and operation of the Multi Academy Trust (MAT) and member schools.

The bodies may include:

1. Trust Members**
2. Trust Board of Directors
3. Trust Finance Committee
4. Trust Audit and Risk Committee
5. Trust HR Committee
6. Trust Education and Standards Committee
7. CEO
8. Local Governing Committees
9. Leadership group of Headteachers
10. Headteachers of individual schools

The delegated powers are broken down into different levels in line with the Trust's principles of governance, leadership and operation. The delegated autonomy for individual schools is aligned with the need for the Trust to fulfil its corporate responsibilities and accountabilities to the Department for Education, Education Funding Agency, Charities Commission, HMRC and Companies House.

The different levels of delegated power are listed below but it should be noted that not every task requires all levels of delegated power to be defined:

- Approve (A)
- Recommend (R)
- Develop (D)
- Monitor & Report (M)
- Consulted (C)
- Implement (I)

The Scheme of Delegation should be read in conjunction with the Terms of Reference for the relevant body. While the Scheme is designed to be comprehensive, it will not cover every task.

Trust & School policies

A key task for the Trust Board is to develop a policy matrix identifying the range of statutory, regulatory and necessary policies and whether they are Trust or School policies. The Scheme of Delegation will set out the responsibility for approval and monitoring of these policies. The *Notes* column is used to identify key Trust or School policies.

** The Trust Members delegate powers to the Trustees. However, the Members approve the following:

a) The Trust Articles of Association (SoD 1.1)
b) The appointment of the Trust Auditors (SoD 5.4)
c) The appointment of up to 7 Trustees (Article 50)

#	Task Key: Approve (A), Recommend (R), Develop (D), Monitor & Report (M), Consulted (C), Implement (I), Accountable (Acc), Support (S)	Notes	Trust Board	Finance	Audit & Risk	HR	Education & Standards	CEO	LGC	Leadership Group	Head	Exec-Head	Head of School
1.	**Governance**												
1.1.	Approve Trust Articles of Association	Members only	R										
1.2.	Approve Trust Board Terms of Reference	Article 105	A					R					
1.3.	Approve Trust Scheme of Delegation	Article 105	A					R		C			
1.4.	Approve new convertor or sponsored schools joining Trust	Subject to criteria and due diligence	A					R					
1.5.	Establish Trust Committees	Article 100	A	R	R	R		R					
1.6.	Approve Trust Committee Terms of Reference	Article 105	A	I	I	I		R					
1.7.	Establish Local Governing Committees	Article 100	A					R					
1.8.	Approve Local Governing Committee (LGC) Terms of Reference	Article 105	A					R	I				
1.9.	Decision to intervene in school governance	Article 93	A					R					
1.10.	Appoint (and remove) Chair of Trust Board	Articles 82 and 90	A										
1.11.	Appoint Chair and Vice Chair of LGC		A						R				
1.12.	Remove Chair or Vice Chair of LGC	Article 105 but in exceptional circumstances	A						R				
1.13.	Appoint Trust Governors to the LGC	Article 105	A						R				
1.14.	Remove LGC members	Article 105 but in exceptional circumstances	A						R				
1.15.	Appoint (and remove) Chair(s) of Trust Committees	Article 105	A	R	R	R	R						

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1.16.	Appoint (and remove) Trust Committee members	Article 105	A	R	R	R	R						
1.17.	Appoint (and remove) Clerk to Trust Board	Article 81	A					R					
1.18.	Appoint (and remove) Clerk to LGC	Article 105	A						R				
1.19.	Appoint Accounting Officer		A										
1.20.	Trust Policy Matrix	Article 93	A					R		C			
1.21.	Trust Statutory Policies		AM	RM	RM	RM		RM					
1.22.	Trust Governance Calendar		A					R					
1.23.	Trust Risk Management Strategy		A					R					
1.24.	Trust Risk Management Plan		AM	M	M	M		RM	M				
1.25.	Approve Directors Expenses Policy	Trust Policy	A	R									
1.26.	Appoint a Company Secretary	Not mandatory	AR										
1.27.	Trust website	Compliance	M				RM	RI		C			
1.28.	LAC/PLAC Designated Teacher	Compliance							M		A		A
1.29.	Engagement with parents		M						MI		I	I	I
1.30.	DBS checks		M						M		I	I	I
2.	**TRUST & School Performance/Planning**												
2.1.	Trust Vision, Ethos & Values		A					RI	C	C			
2.2.	Trust Strategic Plan		AM					RI		C			
2.3.	School Performance Targets		AM				RM	R	RM	C	DI	DIC	DI
2.4.	School Performance Review		AM				RM	R	R	C	DI	DIC	DI
2.5.	School Development Plan		A					R	RM	C	DI	DIC	DI
2.6.	Decision to intervene in school management	Article 93	A					RI					
2.7.	School Staff Development Plan	Within School 1 Year Plan						M		C	AI	AI	CI

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2.8.	Trust Inset Days	See 8.1	A					R		C			
2.9.	Ofsted Inspections (see footnote[1])							M	M		I	I	I
2.10.	SIAMS[2]	For Church schools					M	M			I	I	I
3.	**Curriculum**												
3.1.	To ensure a broad and balanced curriculum is in place		AM				M	M	RM		RI	RI	RI
3.2.	To embed agreed curriculum and enrichment offer		M				M				I	I	I
4.	**Staff Policies and Pay**												
4.1.	HR, Employment & Staff related policies	Trust Policies	A			R		R	M	C	I	I	I
4.2.	Employee Terms & Condition changes		A			R		R			I	I	I
4.3.	Employee T&Cs for new schools		A			R		R					
4.4.	Headteacher/Exec Head/Head of School Performance Review/Targets	HT PMR Panel						A	R		I	ARI	I
4.5.	Setting staff Performance Targets										AIM	AIM	RIM
4.6.	Teachers Annual Pay Award	Trust Pay Policy	A	R		C		RI		C			
4.7.	Support Staff Annual Pay Award	Trust Pay Policy	A	R		C		RI		C			
4.8.	Headteacher and Deputy Headteacher Individual School Range	Trust Pay Policy	A			R		R					

[1] During the Ofsted call, Headteachers will inform the Inspector they will meet with the CoG and CEO, or their representatives. Under the new Ofsted framework, Inspectors will also wish to meet with the Chair of Trustees.

[2] Preparation for SIAMs will be led by the Church School Hub and monitored by the CEO and the Education and Standards Committee, supported by the Foundation Trustees and Governors. Inspectors will also ask to speak with the Chair of Trustees.

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4.9.	CEO Performance Review & Pay	CEO PMR Panel	A			I							
4.10.	Headteacher Performance Pay	Trust Pay Panel Trust Pay Policy				A		R	R			R	
4.11.	Deputy Headteacher Performance Pay	Trust Pay Panel Trust Pay Policy				A		R			R	R	
4.12.	Staff Performance Pay Awards	Trust Pay Panel Trust Pay Policy				A		R			R	R	R
4.13.	TLRs & Allowances	Trust Pay Policy						A			R	R	R
5.	**Staff Management**												
5.1.	CEO appointment	Article 107	A										
5.2.	Trust staff structure & complement							A		C			
5.3.	Senior Central Trust staff appointments (Scale 10 and above)		A					R		C			
5.4	Central trust Staff appointments							A					
5.4.	School staff structure & complement	Within School 1 Year Plan	A					M	C		DRI	DRI	DI
5.5.	Headteacher appointment	Article 107a Trust /LGC panel	A					R	R				
5.6.	Senior leadership appointments							A	C		RD	RD	R
5.7.	Teaching and support staff appointments										A	A	A
5.8.	Decision to intervene in school staff management		A	C		C		RI					
5.9.	Suspension of CEO	Trust policy Chair recommends											
5.10.	Return of CEO after suspension	Trust policy Chair recommend											
5.11.	Dismissal of CEO	Trust policy Trust Board panel											

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5.12.	Suspension of Headteacher/Exec Head/Head of School	Refer to Trust policy[3]											
5.13.	Return of Headteacher/Exec Head/Head of School after suspension	Refer to Trust policy											
5.14.	Dismissal of Headteacher	Refer to Trust policy											
5.15.	Appeal against dismissal of Headteacher	Refer to Trust policy											
5.16.	Suspension of Central Trust staff	Refer to Trust policy											
5.17.	Return of Central Trust staff after suspension	Refer to Trust policy											
5.18.	Dismissal of Central Trust staff	Refer to Trust policy											
5.19.	Appeal against dismissal of Central Trust staff	Refer to Trust policy											
5.20.	Suspension of teaching staff	Refer to Trust policy											
5.21.	Suspension of support staff	Refer to Trust policy											
5.22.	Return of teaching staff after suspension	Refer to Trust policy											
5.23.	Return of support staff after suspension	Refer to Trust policy											
5.24.	Dismissal of teaching staff	Refer to Trust policy											
5.25.	Dismissal of support staff	Refer to Trust policy											

[3] For 5.9 – 5.23, refer to the Trust's Staff Discipline and Dismissal Procedure.

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5.26.	Appeals against dismissal of teaching and support staff	Refer to Trust policy											
5.27.	Redundancy of school staff	Trust policy	A					R	C		DIR	DIR	I
5.28.	Restructuring of school staff leading to potential redundancy/quality of provision	Trust policy	A					R	C	C	DCI	DCI	DCI
5.29.	Redundancy of Central Trust staff		A			C		R					
6.	**Financial Governance & Management**												
6.1.	Trust & School Financial Regulations	Trust Policy	A	RM	RM				M				
6.2.	Trust & School Financial Procedures	Trust Policy	A	RM	RM				M				
6.3.	Decision to intervene in school financial management	Article 105 & 94a	A	R					C		C	C	
6.4.	Appoint Trust auditors	Members	R		R								
6.5.	Trust 3 year Budget Plan		A	R						C			
6.6.	Trust 1 year Budget	Article 94a	A	R						D			
6.7.	Trust Services to schools	Article 94a	A	R						D			
6.8.	Trust Charges to schools	Article 94a	A	R						D			
6.9.	Trust Budget Reports		A	RM									
6.10.	Trust Annual Accounts	Article 129	A	R									
6.11.	Trustees Report	Article 130	A		R								
6.12.	Trust Accounts Return to ESFA		A	R				A					
6.13.	Response to Auditor's Management Ltr		A		R								
6.14.	School 1 year Budget	Article 94a CFO to recommend	A	R				R	C[4]		C	C	

[4] Via the Link Governor (school finance staff to support)

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6.15.	School Budget Reports		A						M		M	M	
6.16.	Asset Management Policy	Trust Policy	A	R						C			
6.17.	Trust Asset Management Plan			A				R					
6.18.	School Asset Management Plan		A	A[5]					R[6]		R	R	
6.19.	Annual internal scrutiny programme		A	R									
6.20.	Pupil Premium	Statutory					M		AM				
7.	**Financial Authorisation**												
7.1.	Compensation payments up to £50,000 (over £50,000 must be approved in advance by the ESFA) (Appendix A)		A	C		C		R		C	R	R	
7.2.	Expenditure approval limits are all included in the Financial Regulations	Financial Regulations	A	R									
7.3.	Capital expenditure limits above the LGB expenditure limit or where the school is asking for a donation from the Trust must complete a Business Case	Over £100k must be approved by the Trust Board	A	RA				R					
8.	**School Policies & Procedures**												
8.1.	School times, terms and holidays		A					R	C	R	C	C	C
8.2.	Change of School Age Range		A					R	R	C	R	R	
8.3.	Change of School PAN		A					R	R	C	R	R	
8.4.	Extension of School provision		A					R	R	C	R	R	
8.5.	Extended services on-site								A		R	R	

[5] Individual plans are approved by the Trust Board through expenditure limits
[6] Via the Link Governor

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8.6.	Child Protection & Safeguarding Policy	Trust Policy	AM					R	M	RM	MI	M	I
8.7.	Filtering and Monitoring						M		M		I		I
8.8.	School Statutory Policies	See policy matrix							AM		MI		
8.9.	School non-Statutory Policies	See policy matrix							AM		RMI		
8.10.	Short-term Exclusion								M		A		
8.11.	Return after short-term exclusion								M		A		
8.12.	Permanent Exclusions								A		R		
8.13.	Appeals against Permanent Exclusion	Independent Panel	I										
8.14.	Complaints Policy	Trust policy	A										
8.15.	Complaints Appeals	Trust policy	I										
8.16.	Admissions Policy	School Policy	A					R	R		R		
8.17.	Admissions allocation of places	As per Trust policy									I		
8.18.	Admissions Appeals	Independent Panel	I										
8.19.	Website compliance							M			AI		
8.20	School website format							C	M		A		
8.21	School logo & branding							A	R		D		
8.22	School uniform							A	R		D		
9.	**Health & Safety/Data Protection/Cyber Security/ICT/Equalities Legislation**												
9.1.	Health & Safety Policy	Trust Policy with schools' specific appendix	A		R				M		I		I
9.2.	Data Protection (GDPR) Policy	Trust Policy	A		R				M		I	I	
9.3.	Cyber Security and ICT Infrastructure		MA		M		RM				I	I	
9.4.	Equalities Objectives: Trust		A			R		I					
9.5.	Equalities Objectives: School								AM		RI	RI	I

Appendix A

Summary of freedoms and delegations (from Academy Trust Handbook)

Type of transaction	Delegation
Novel, contentious and repercussive transactions	DfE agreement required 5.5
Staff special severance payments and compensation	DfE agreement required if non-statutory or non-contractual element is £50,000 or more before tax 5.10 to 5.16
Ex gratia payments	DfE agreement required 5.17
Writing-off debts and losses (subject to £250,000 ceiling)	DfE consent required if exceeds 1% of annual income or £45,000 individually; or 2.5% or 5% of annual income cumulatively 5.19 and 5.20

Entering into indemnities (beyond the normal course of business), guarantees or letters of comfort (subject to £250,000 ceiling)	DfE consent required if exceeds 1% of annual income or £45,000 individually; or 2.5% or 5% of annual income cumulatively 5.19 and 5.20
Acquiring freehold land and buildings	DfE agreement required 5.23
Disposing of a freehold on land and buildings	DfE agreement required 5.23
Disposing of heritage assets	DfE agreement required 5.23
Other asset disposals	Trust has full discretion 5.24
Taking up a finance lease not on the DfE approved list	DfE agreement required 5.26
Taking up a leasehold on land and buildings	DfE agreement if lease term 7 years or more 5.26

Taking up any other lease	Trust has full discretion 5.27
Granting a lease on land and buildings	DfE agreement required 5.26
GAG carry forward	No limits if trust eligible 5.29
Pooling by trusts with multiple academies	No limits (except PFI) if trust eligible 5.31
Loan, overdraft	DfE agreement required 5.34
Credit cards (for business use)	Trust has full discretion provided charges not incurred 5.34
Supplies to the trust from related parties	DfE agreement required over £40,000 and over associated limits in 5.43 unless exempt as set out in 5.43