

Scheme of Delegation

The Consortium Academy Trust (the Trust) is a multi academy trust (MAT). A MAT is a group of academies that have come together to form a charitable company with a single governance structure. MATs are accountable directly to the Secretary of State for Education through the Regional Schools Commissioners. The group of schools in a multi academy trust works together with a common strategic vision and mission, under a shared master funding agreement.

This Scheme of Delegation should be read in conjunction with the following documents:

- The Trust’s Articles of Association, which set out the charitable objects of the Trust along with its governance composition and overarching procedures.
- The Trust’s Funding Agreements that set out the conditions upon which the Trust receives its funding.
- The [Academy Trust Handbook](#) which is issued annually by the Education and Skills Funding Agency (ESFA) and sets out the financial framework and governance requirements for multi academy trusts reflecting their status as companies, charities and public bodies.
- The [Department for Education Governance Handbook](#) for academy trusts and maintained schools.

The multi academy trust has several layers of governance as can be seen on the structure chart.

Members are the guardians of the governance of the Trust and must ensure it carries out its charitable objectives. To do this they require an overview of governance arrangements, but responsibility for conducting the business of the Trust remains firmly with the Trustees. Members should therefore be ‘eyes on, hands off’. The Trust’s Articles of Association set out the charitable objects of the Trust along with its governance composition and overarching procedures.

Trust Board has ultimate legal accountability for the Trust and is responsible for Trust policy and strategic decision-making. The Trustees oversee the management and administration of the Trust and its academies and delegate authority and responsibility to others, including executive officers and school leadership teams, to undertake the day-to-day management of the Trust and its schools. Key matters reserved to the Board include setting the strategic direction, vision and values of the Trust and approval of the Trust strategic plan, statutory policies and educational targets. The Trustees act as both charity trustees and the directors of the company (the academy trust).

Board committees include the following:

- Quality and Standards
- Audit and Risk
- Finance, People and Resources
- Executive Performance

Local Governing Boards (LGB) are committees of the board established in each academy and accountable to the Trust Board for ensuring that the academy leadership team fulfils its responsibility for educational outcomes for their pupils, safeguarding, health and safety and community engagement. The LGB Terms of Reference set out the constitution, the process for appointment/removal of members and how the LGB will operate.

Senior Leadership Team comprises the Chief Executive Officer (CEO), Director of Finance, and other senior Trust leaders. The Trustees delegate the day-to-day management of the Trust to the CEO, who is also the Accounting Officer (AO). The CEO may delegate responsibilities to other members of the Senior Leadership Team (SLT), in accordance with the relevant job descriptions of those post holders. The CEO and SLT are responsible for the operational running of the Trust and for supporting the academies.

Academy Leaders (Headteachers) of the Trust academies are responsible for the day-to-day management of the Trust's schools

The following pages detail the specific responsibilities of the Members, Trustees, Board Committees, Senior Leadership Team, Local Governing Boards and Academy Leaders in the areas of

- Governance (page 4)
- Strategy & Leadership (page 5)
- Education & Curriculum (page 7)
- Finance and Resources (page 12)
- Human Resources (page 19)

To assist interpretation of the matters delegated in the scheme it uses defined phrases which are supplemented by additional comment and cross referencing as appropriate.

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

Chair's Action

No individual Trustee is empowered to make decisions on behalf of the Trust outside of any specific authority set out in this scheme of delegation. Where appropriate, urgent decisions that arise between meetings, may be dealt with by "Chair's Action" where it is not possible to convene a meeting of the Board at short notice.

Notwithstanding any provisions of the Articles, if the Chair, (or in their absence the Vice Chair) is of the opinion that a matter of urgency exists either after receiving the CEO's written report or as a result of other information that is brought to their attention and a delay in exercising the function would likely be seriously detrimental to the interests of the Trust, any Academy, pupil or their parent or a person who works at the Trust, then, in consultation with the CEO, they may exercise any function of the Trust which can be delegated to an individual or any function relating to the exclusion of pupils. Any use of this power will be reported to the next Board or relevant Committee meeting.

The following types of decision cannot be made by Chair's action: decisions relating to admissions, budget approvals, decisions on executive pay.

Variation in the Scheme of Delegation

Given that that the accountability for the performance, both educational and financial, of all Trust academies lies with the CEO and the Board of Trustees, the Board reserves the right to vary the Scheme of Delegation according to circumstance and need. An academy where there are concerns about leadership, governance or other areas, may have fewer delegated functions which will be determined on a case-by-case basis.

Trust and Academy policies

Separate to this Scheme of Delegation is a policy schedule which identifies the range of statutory, regulatory and necessary policies. The summary sets out the responsibility for approval and monitoring of these policies. To avoid duplication, policies are therefore not included in the main scheme of delegation.

GOVERNANCE							
D = Decide, P = Propose, R = Review, C = Consult, M = Monitor							
Responsibilities	Members	Trust Board	Board committee	CEO	LGB	Academy leader	Comments/Reference
Trust Articles of Association	D	P					
Scheme of Delegation		D					
Terms of Reference – board and committees		D	R				
New Academies joining the Trust		D		P			
Establish board committees including Local Governing Boards (LGBs)		D					Only the board can establish sub-committees and local governance/academy committees.
Establish working groups		D					
Appoint and remove members (<i>minimum 3</i>)	D						
Appoint and remove Directors – <i>Members – up to 7</i> – <i>Board – co-opt additional Trustees</i>	D	D					
Appoint and remove Co-Opted Advisors to the Board and its Committees		D	P				
Appoint and remove Chair and Vice Chair of Trust Board		D					
Appoint and remove Chair of LGB		D					
Appoint and remove Vice Chair of LGB					D		
Appoint and remove chairs of board committees			D				
Appoint and remove members of board committees		D					
Appoint and remove Governance Professional (Clerk to the Trust Board)		D					Academy Trust Handbook section 1.49

GOVERNANCE							
D = Decide, P = Propose, R = Review, C = Consult, M = Monitor							
Responsibilities	Members	Trust Board	Board committee	CEO	LGB	Academy leader	Comments/Reference
							DfE Clerking Competency Framework
Appoint and remove Clerks to the LGBs				D		C	
Calendar of Trust Board, committee and LGB meetings		D	C	C	C	C	
Level of delegation to each academy		D		P			

STRATEGY AND LEADERSHIP							
D = Decide, P = Propose, R = Review, C = Consult, M = Monitor							
Responsibilities	Members	Trust Board	Board committee	CEO	LGB	Academy leader	Comments/Reference
Set strategic objectives of the Trust & Academies		D		P	C	C	Governance Handbook section 2.1.
Develop the character, mission & ethos of Trust & Academies		D		P	C	C	Governance Handbook section 2.2
Develop a three year Strategic Plan		D		P	C	C	Governance Handbook section 2.1.3
Trust Risk Register		D	R				<p>The Trust must manage risks to ensure its effective operation and must maintain a risk register. The board holds oversight of strategic risks across the Trust. Local Governing Boards hold oversight of school level risks.</p> <p>Academy Trust Handbook section 2.38</p>

STRATEGY AND LEADERSHIP							
D = Decide, P = Propose, R = Review, C = Consult, M = Monitor							
Responsibilities	Members	Trust Board	Board committee	CEO	LGB	Academy leader	Comments/Reference
Academy Risk Register		D	M	P	C	M	Academy Trust Handbook section 2.38
Training programme for trustees and governors				D	C	C	
Parental and wider community engagement strategy		D		P			The board should ensure parental engagement takes place; individual schools are responsible for engaging with their communities. Governance Handbook section 2.4.17.
Ensuring compliance with equalities legislation		D		P			The board is responsible for ensuring overall compliance with legislation, they can delegate compliance delivery. Governance handbook section 6.4.

EDUCATION AND CURRICULUM							
D = Decide, P = Propose, R = Review, C = Consult, M = Monitor							
Responsibilities	Members	Trust Board	Board committee	CEO	LGB	Academy leader	Comments/Reference
Appointment of the Quality and Standards Committee (Q&S Committee)		D					Only the board can establish sub-committees and local governance/academy committees.

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Responsibilities	Members	Trust Board	Board committee	CEO	LGB	Academy leader	Comments/Reference
Appoint Chair of Q&S Committee			D				
Academy Development Plans (School Development Plans)			R	D	C M	C	Developed by the school and endorsed by Executive team prior to approval by board. Monitoring undertaken at Q&S, LGB and School level.
Key Performance Indicators – setting and reviewing performance of the Trust & the Academies		D	R	P	M		The board must have access to objective, high quality and timely data to ensure and embed robust accountability and know the questions that need to be asked of the executive leaders. Governance Handbook, section 3.4.
Curriculum – setting the Trust approach to curriculum and assessment (including EYFS) with regard to statutory requirements.		D	R	P	C M	C	The board remains accountable for ensuring statutory requirements are met. Governance Handbook, section 6.5.1
Setting and delivering school curriculum and assessment in line with Trust approach				D	C		School leaders are responsible for delivering in their school, with oversight and support from executive team.
Set admissions policy		D		P	C	C	Governance Handbook, section 6.10.
Keeping admission and attendance registers		D		M	M		The board must reassure themselves that the school keeps admission and attendance registers

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Responsibilities	Members	Trust Board	Board committee	CEO	LGB	Academy leader	Comments/Reference
							<p>in accordance with regulations. The board holds responsibility for ensuring overall compliance, with delivery carried out by the executive team and schools.</p> <p>Governance Handbook, section 6.9.6.238</p> <p>The Academy Leader is responsible for admission and attendance registers within their school.</p>
Self-evaluation – carrying out the self-evaluation process and the areas for improvement with particular regard to outcomes and success criteria.		R	R	D	R	P	LGB will focus on specific curriculum areas through its engagement activities.
Approach to student issues (including attendance, exclusions, punctuality and disciplinary matters for each Academy)		M	M	M	M		<p>The Trust board holds responsibility for ensuring overall compliance, with delivery carried out by the executive team and schools. The school will convene exclusion panels to consider individual exclusions.</p> <p>Governance Handbook, section 6.9.4, 6.9.5.</p>
Academy Hours – setting the opening and closing times for the Academies		D		P	C	C	Governance Handbook, section 6.9.8

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Responsibilities	Members	Trust Board	Board committee	CEO	LGB	Academy leader	Comments/Reference
Term Dates and length of school day		D		P	C	C	Governance Handbook, section 6.9.8
School lunch – ensure provided to appropriate nutritional standards					M	D	Governance Handbook, section 6.9.9
Provision of free school meals to those meeting criteria					M	D	Governance Handbook, section 6.9.9
Adopt a Trust-wide Safeguarding and Child Protection policy that is compliant with statutory guidance		D		P	M	C	Governance Handbook section 6.8 Academy Trust Handbook section 1.15
Adopt and monitor procedures related to safeguarding		D		P	M	M	Keeping Children Safe in Education (DFE, updated annually).
Appoint a Board member as Safeguarding Trustee		D					All boards should have an individual to take leadership responsibility for the organisation's safeguarding arrangements, which include the Prevent duty and there should be a corresponding role at academy committee level. Governance handbook section 6.8.201
Appoint a Safeguarding LGB lead member for each academy					D		
Ensure the Single Central Record (SCR) for the Trust and academies is complete and regularly updated and that DBS				D	M	D	Governance Handbook 6.6.3.119.

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Responsibilities	Members	Trust Board	Board committee	CEO	LGB	Academy leader	Comments/Reference
checks are completed for all individuals.							
Ensure academies have an appropriate number of trained Designated Safeguarding Leads (DSLs) and that their details are published on the Academy website.				D	M		Governance Handbook 6.8.202
Ensure Academy staff and the Trust central team receive regular and appropriate safeguarding training.				D		D	KCSIE
Ensure appropriate members of staff, trustees and governors are trained in safe recruitment.		M		D		D	KCSIE
Ensure that each academy has appointed a designated member of staff to support Looked After Children.				M	M	D	Governance handbook sections 6.5.13 Boards are required to appoint a designated teacher to promote the educational achievement of children who are looked after and certain previously children who were looked after.
Ensure compliance with SEND code of practice		D			M		The Trust board holds responsibility for ensuring overall compliance, with delivery carried out by the executive team and schools. Governance Handbook, sections 6.4.11.52-57; SEND Code of Practice;

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Responsibilities	Members	Trust Board	Board committee	CEO	LGB	Academy leader	Comments/Reference
							Children and Families Act 2014
Appoint a Board member as SEND lead Trustee		D					There should be a member of the board or a committee with specific oversight of the school's SEND arrangements. Governance handbook section 6.5.11
Monitor Pupil Premium spend, including year 7 literacy and numeracy catch up and PE and Sport Premium.		D	R	M	R M	P	Boards should ensure that pupil premium funding is being spent on improving attainment for eligible pupils. Governance Handbook, section 6.7.3.176
Deliver careers guidance with regard to statutory requirements.		D	R	P	M	P	All schools must ensure there is 'an opportunity for a range of education and training providers to access all pupils in years 8-13', and statutory careers guidance must also be met. The board should ensure compliance is achieved, with the executive team and schools delivering careers guidance. Governance Handbook, section 6.5.9
Appoint a designated Careers lead trustee.		D					Careers guidance and access for education and training providers

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Responsibilities	Members	Trust Board	Board committee	CEO	LGB	Academy leader	Comments/Reference
							publishing.service.gov.uk Governance Handbook, section 6.5.9.63
Attending Ofsted inspections		D		C	D	C	The Trust should decide which governance representatives will be present which may be trustees, executive leaders and/or LGB representatives. Governance handbook section 7.3
Post Ofsted action plan sign off		D		P	M	C	
Academy Prospectus and website				D	M	C	
Trust Prospectus and website		M		D			

FINANCE AND RESOURCES							
D = Decide, P = Propose, R = Review, C = Consult, M = Monitor							
Responsibilities	Members	Trust Board	Board committee	CEO	LGB	Academy leader	Comments/Reference
Appointment of the Finance, People and Resources Committee		D					The Trust must have a dedicated audit committee if the annual income exceeds £50m, otherwise the committee

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Responsibilities	Members	Trust Board	Board committee	CEO	LGB	Academy leader	Comments/Reference
							may be combined with another. Academy Trust Handbook section 3.6.
Appointment of Chair of FPR Committee			D				
Appointment and removal of External Auditors	D	R	R	P			Governance Handbook, section 5.2.1.23 Academy Trust Handbook sections 4.5-4.8 ESFA must be notified of removal before end of contract
Appointment of the Internal Auditors		D	R	P			The board and audit committee hold responsibility for approving the annual programme of internal scrutiny as put forward by the executive team, with input from internal auditors as relevant. Academy Trust Handbook sections 2.6, 3.1-3.22.
Establishing control framework including programme of internal audit			D	P			
Annual Report and Accounts		D	R	P		C	Governance Handbook, section 6.7.1.166, Academy Trust Handbook sections 4.1-4.4

FINANCE AND RESOURCES							
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Responsibilities	Members	Trust Board	Board committee	CEO	LGB	Academy leader	Comments/Reference
Scheme of Financial Delegation & Financial Policies		D	R	p			
Bank Accounts – authorising the establishment of bank accounts and approve bank mandates in the name of the Trust		D	R	P			
Funding Model - agreeing a funding model across the Trust and develop an individual funding model for the Academies		D	R	P	C	C	
Trust 3-year budget plan		D	R	P			Governance Handbook, section 6.7.1 Academy Trust Handbook section 2.8-10
Trust Annual Budget		D	R	P			
Academy 3-year budget plan		D	R	P	C	C	
Academy Annual Budget		D	R	P	M		
Delivering monthly management accounts and forecasts		D	R	P			<p>The Trust must prepare management accounts every month setting out its financial performance and position. The board must ensure budget forecasts for the current year and beyond are compiled accurately. The board must review management accounts at least six times each year that have been prepared by the executive team.</p> <p>Academy Trust Handbook, section 2.10 & 2.18.</p>

FINANCE AND RESOURCES D = Decide, P = Propose, R = Review, C = Consult, M = Monitor							
Responsibilities	Members	Trust Board	Board committee	CEO	LGB	Academy leader	Comments/Reference
Managing cash position		D	R	P			<p>The Trust must manage its cash position robustly. It must avoid becoming overdrawn. It may be required to report on its cash position to ESFA where there are concerns about financial management. The board are responsible for holding oversight of cash management across the Trust.</p> <p>Academy Trust Handbook section 2.24.</p>
Setting delegated authority limits for financial transactions		D	R	P			Governance Handbook section 6.7.1
Expenditure and ensuring delivery of Annual Budgets (in accordance with financial regulations within set budgetary limits)		M	M	P		P	Academy Trust Handbook section 2.27-2.29
Capital project expenditure (requiring board approval in accordance with financial regulations)		D	R	P	P		In accordance with financial regulations within set budgetary limits.
Capital project expenditure (once approved by board, or below budgetary limits requiring approval by board)				D	P		In accordance with financial regulations within set budgetary limits.
Investments – agreeing the investment policy in line with the Academy Trust Handbook		D	R	P		C	Academy Trust Handbook section 2.25.

FINANCE AND RESOURCES							
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Responsibilities	Members	Trust Board	Board committee	CEO	LGB	Academy leader	Comments/Reference
Enter into contracts		D	R	P			In accordance with limits set within financial regulations.
Managing conflicts of interest and related party transactions		D	R				<p>The Trust must maintain a register of interests for members, trustees, local governors and senior employees. This is held by the Director of Corporate Governance.</p> <p>Governance handbook section 2.3.14</p> <p>Academy Trust Handbook section 5.45</p>
Approve contracts with constitute related part transactions		D	R	P			<p>Academy Trust handbook section 5.35-5.44</p> <p>Prior approval of ESFA required over £20k</p>
Ensure compliance with ESFA requirements		D	R	M			<p>Compliance must be ensured in areas including novel, contentious and repercussive transactions, disposal of land and assets, use of School Condition Allocations, use of school premises. The board ensures compliance with the executive team delivering on all requirements.</p> <p>Academy Trust Handbook section 5</p>

FINANCE AND RESOURCES							
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Responsibilities	Members	Trust Board	Board committee	CEO	LGB	Academy leader	Comments/Reference
Determining and allocating central services provided to the Academies by the Trust		D	R	P	C	C	
Authority to spend on approved, costed items provided in current year's budget				D	M		Trust's Financial regulations
Authority to spend on items not provided, approved and costed in current year's budget		D	R	P	M		Trust's Financial regulations
Ensure compliance with tendering processes		M	M	D			Trust's Financial regulations
Disposals or write off of stock, assets or debts		D		D			In accordance with ESFA statutory requirements and Trust's Financial Regulations. Academy Trust Handbook section 5.19
Disposals or write off of stock, assets or debts above £45k (ESFA prior approval required)		D	R				
Asset and Premises Maintenance Strategy		D	R	P	C	C	Governance handbook section 6.11
Acquiring and disposing of Trust land or property		D	R	P	C	C	Academy Trust Handbook section 5.23 In accordance with ESFA requirements for prior approval
Changing use of Assets		D	R	P	C	C	Academy Trust Handbook section 5.23
Arranging insurance for the Trust		M	M	D			Governance handbook section 4.5.57 Academy Trust Handbook section 2.40

FINANCE AND RESOURCES							
D = Decide, P = Propose, R = Review, C = Consult, M = Monitor							
Responsibilities	Members	Trust Board	Board committee	CEO	LGB	Academy leader	Comments/Reference
Setting Trust wide procurement policies		D	R	P			
Entering into borrowing							Academy Trust Handbook section 5.33 ESFA prior approval required
Entering/granting any leasehold or tenancy agreement for more than 5 years		D	R	P			Academy Trust handbook section 5.25 Subject to ESFA requirements for prior approval.
Entering into a finance lease above approved thresholds		D	R	P			
Entering into a finance lease at or below approved thresholds				D		C	
Entering into an operating lease above approved threshold		D	R	P			
Entering into an operating lease below approved threshold				D		C	

HUMAN RESOURCES							
D = Decide, P = Propose, R = Review, C = Consult, M = Monitor							
Responsibilities	Members	Trust Board	Board committee	CEO	LGB	Academy leader	Comments/Reference
Appointment of the Executive Performance Committee (EP Committee)		D					Only the board can establish sub-committees and local governance/academy committees.

HUMAN RESOURCES							
D = Decide, P = Propose, R = Review, C = Consult, M = Monitor							
Responsibilities	Members	Trust Board	Board committee	CEO	LGB	Academy leader	Comments/Reference
Appointment and dismissal of CEO/Accounting Officer		D					The CEO is held accountable by the board of Trustees for the performance of the whole trust. The board appoints the accounting officer. Governance Handbook, section 6.6.1
Appointment and dismissal of FD		D		R			The Trust must appoint a FD to act as the Trust's finance director, business professional or equivalent. Governance Handbook section 6.7. Academy Governance Handbook 1.45
Appointment and dismissal of Head Teachers				D	C		The Trust will decide which governance representatives will be present which may be trustees, executive leaders and/or LGB representatives.
Appointing Executive Leadership Team other than CEO and FD (Directors)				D			
Appointing of cross-Trust Staff /central team members		M	M	D			
Appointing Academy SLT (excluding Principal)				C		D	
Appointing Academy Staff (excluding SLT & Principal)				C		D	

HUMAN RESOURCES							
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Responsibilities	Members	Trust Board	Board committee	CEO	LGB	Academy leader	Comments/Reference
Establishing Trust wide HR Policies in accordance with all appropriate regulations		D	R	P		C	
Setting Performance Management Policy		D	R	P			Academies are free to determine their own appraisal process and may adopt the requirements for maintained schools if they wish. Governance Handbook, section 6.6.6
Teachers' Annual Pay Award		D	R	P			
Support Staff Annual Pay Award		D	R	P			
CEO Performance review and incremental progression		D	R				The board must ensure its decisions about levels of executive pay (including salary and any other benefits) follow a robust evidence-based process. Governance Handbook, section 6.6.140 Academy Trust Handbook, section 2.30-2.32
Senior Leadership Team Performance review and incremental progression		D	R	R			This includes the Directors.
Academy staff individual performance review and incremental progression				C		D	

HUMAN RESOURCES							
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Responsibilities	Members	Trust Board	Board committee	CEO	LGB	Academy leader	Comments/Reference
Central team individual performance review and incremental progression				D			
Setting Terms and Conditions of Employment and Staff Handbook		D	R	P			
Discipline, capability and grievance in relation to CEO		D					
Discipline, capability and grievance in relation to Head Teacher or Director (other than CEO)				D			
Appeals against discipline, capability and grievance in relation to Head Teacher or Director (other than CEO)		D					
Suspension of Head Teacher or Director (other than CEO)		C		D			
Discipline, capability and grievance in relation to school staff up to and including senior leadership team						D	
Appeals against discipline, capability and grievance in relation to decisions taken by Head Teacher				D			
Suspension of school staff up to and including senior leadership team						D	
Dismissal of school staff up to and including senior leadership team						D	
Appeal against dismissal decisions taken by Head Teacher				D			

HUMAN RESOURCES							
D = Decide, P = Propose, R = Review, C = Consult, M = Monitor							
Responsibilities	Members	Trust Board	Board committee	CEO	LGB	Academy leader	Comments/Reference
Dismissal of central team staff (other than Directors)				D			The CEO may delegate decision making to the relevant Director lead to allow the CEO to act as the appeal authority.
Appeal against dismissal of central team staff (other than Directors)		D		D			
Dismissal of all other staff (in accordance with the Trust disciplinary and capability policies)						D	
Staffing complement, structure and grades				D			
Adoption of transferring policies and collective agreements		D		R			
Response to requests for flexible working				D		D	The CEO would decide for Central staff, the Head Teacher for school staff
Response to requests for early retirement				D		D	As above
Dismissal compensation payments less than or equal to £25k				D		R	Academy Trust Handbook section 5.14-5.16
Dismissal compensation payments from £25k to £50k		D		R			
Dismissal Compensation Payments over £50k		D		R			ESFA prior approval required.
Staff severance/redundancy payments less than or equal to £25k		D		R			Academy Trust Handbook section 5.17-5.18

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Responsibilities	Members	Trust Board	Board committee	CEO	LGB	Academy leader	Comments/Reference
Staff severance/redundancy payments from £25k to £50k		D		R			
Staff severance/redundancy payments over £50k		D		R			ESFA prior approval required.
Ex-gratia payments							Ex-gratia payments must always be referred to ESFA for prior approval. Academies Trust Handbook section 5.17.