



CHILTERN
LEARNING
TRUST

CHILTERN LEARNING TRUST

SCHEME OF DELEGATION

2026/27

SECTION 13: FINANCE (Cont'd)

Summary of delegated finance functions

DELEGATION OF FINANCE FUNCTIONS						
KEY						
✓	Action to be undertaken by this level					
	Function cannot be legally carried out at this level					
Level 1: Members						
Level 2: Board of Trustees						
Level 3: Local Governing Body in conjunction with the Chief Executive						
Level 4: Headteacher (or CEO for central) in conjunction with the Chief Executive						
Although decisions may be delegated, the Board of Trustees as a whole remains responsible for any decision made under delegation.						
			Decision Level			
Finance Function	No	Tasks	1	2	3	4
Budget	1	Preparation of 3 year budget plan in conjunction with the central finance team				✓
	2	Approval of school budget plan : Total salaries should not exceed 77% of total income for secondaries, 80% for primaries. Deployment figure to be no less than 77% for secondaries and 78% for primaries by the start of the next academic year		✓	✓	
	3	Approval of consolidated budget plan		✓		
	4	Approval of procurement under £5k				✓
	5	Approval of school specific procurement over £5k to £10k , three quotes required. CFO to be notified				✓
	6	Approval of school specific procurement above £10k to £50k, (if within budget) three written quotes or formal tender		✓	✓	✓
	6a	Approval of Trust wide or central contract, above £10k to £50k three written quotes or formal tender, inform Board				✓
	7	£50k to £150K. Formal tender, approval delegated to CEO and CFO, inform Board				✓
	7a	Above £150k formal tender (following PCR 2024 rules, where relevant)		✓		
	8	Approval of deficit recovery plan		✓		
Payroll	9	Responsibility for the correct payment of all salaries and bills			✓	✓
	10	Approval of Trustees’ expenses policy		✓		
Assets	11	Maintenance of inventory of items over £1,000			✓	✓
	12	Writing off debts, stocks and surplus assets under £1,000			✓	✓
	13	Writing off debts, stocks and surplus assets over £1,000		✓		
Statutory Accounts	14	Trust and Academy financial regulations (inc key policies		✓		
	15	Consolidated financial statements		✓		
	16	Responses to Auditors’ management letter		✓	✓	✓

SECTION 14: HUMAN RESOURCES

Delegation of Human Resources Functions

This Scheme of Delegation, established as a formal schedule that distinguishes between matters reserved exclusively for the Board of Trustees' approval or decision, and matters delegated to the local governing body and individuals.

DELEGATION OF HUMAN RESOURCES FUNCTIONS						
KEY						
✓	Action to be undertaken by this level					
	Function cannot be legally carried out at this level					
Level 1: Members						
Level 2: Board of Trustees/Chief Executive						
Level 3: Local Governing Body in conjunction with the Chief Executive						
Level 4: Headteacher						
Although decisions may be delegated, the Board of Trustees as a whole remains responsible for any decision made under delegation.						
			Decision Level			
Key Function	No	Tasks	1	2	3	4
Staffing	1	Appointment of Chief Executive		✓		
	2	Appointment of Headteachers – school’s Chair of LGB (or their representative) to sit on the recruitment panel and make appointments with Chair of Board and CEO’s approval.		✓		
	3	Shortlisting and appointment of members of the leadership team (in line with agreed staffing structure)			✓	✓
	4	Appointment of other teachers (in line with agreed staffing structure)				✓
	5	Appointment of support staff (in line with agreed staffing structure)				✓
	6	Transfer of staff within Trust (agreement between Headteachers/CEO required on transition period and handover process)				✓
	7	Agree pay policy		✓		
	8	Pay discretions for Chief Executive, Directors and Central Team members		✓		
	9	Pay discretions for Headteacher		✓		
	10	Pay discretions for members of the leadership team			✓	
	11	Pay discretions for other teachers			✓	
	12	Pay discretions for support staff			✓	
	13	Establishing disciplinary/capability procedures		✓		
	14	Dismissal of Chief Executive (Attendance at Dismissal meeting: At least 3 Trustees, another representative from the Trust, HR representative)		✓		

15	Dismissal of Headteacher <i>(Attendance at Dismissal meeting: At least 2 Trustees - Chair of Board of Trustees and Chair of LGB, another representative from the Trust, HR representative)</i>		✓		
16	Dismissal of a member of the Leadership Team <i>(Attendance at Dismissal meeting: Headteacher and Chair of LGB (or their representative) with advice from HR and another representative from trust)</i>			✓	✓
17	Dismissal of other staff. <i>(Attendance at Dismissal meeting: Headteacher and Chair of Local Governing Body (or their representative) with advice from HR and another representation from trust). NB: Local governing body must act through dismissal committee)</i>			✓	✓
18	Dismissal of a member of the Central Team		✓		
19	Suspending Chief Executive <i>(Suspension process to include at least 3 trustees)</i>		✓		
20	Suspending a Headteacher <i>(Suspension process to include 2 Trustees: inclusive of Chair of Board of Trustees and Chair of LGB with advice from HR)</i>		✓		
21	Suspending a member of the leadership Team <i>(Suspension process to include: Headteacher and Chair of LGB with advice from HR)</i>		✓	✓	✓
22	Suspending another member of staff <i>(Suspension process to include: Headteacher and Chair of Local Governing Body with advice from HR)</i>			✓	✓
23	Ending suspension of Chief Executive		✓		
24	Ending suspension of a Headteacher and member of leadership team		✓		
25	Ending suspension of another member of staff			✓	✓
26	Ending suspension of a member of the Central Team		✓		
27	Determining dismissal payments / early retirement / redundancy payments		✓		
28	Determining staff structures and changes to existing structures		✓	✓	

SECTION 15: KEY FUNCTIONS

Delegation of key functions

This Scheme of Delegation, established as a formal schedule that distinguishes between matters reserved exclusively for the Board of Trustees' approval or decision, and matters delegated to the local governing body and individuals.

DELEGATION OF KEY FUNCTIONS						
KEY						
✓	Action to be undertaken by this level					
	Function cannot be legally carried out at this level					
Level 1: Members						
Level 2: Board of Trustees						
Level 3: Local Governing Body in conjunction with the Chief Executive						
Level 4: Headteacher in conjunction with the Chief Executive						
Although decisions may be delegated, the Board of Trustees as a whole remains responsible for any decision made under delegation.						
			Decision Level			
Key Function	No	Tasks	1	2	3	4
Governance	1	Approve Trust Articles of Association.	✓			
	2	Approve Members’ Terms of Reference.	✓			
	3	Appoint and Remove Trustees.	✓			
	4	Appoint and Remove Chair of LGB.		✓		
	5	Approve Board Terms of Reference.		✓		
	6	Approve LGB Terms of Reference.		✓		
	7	Approve Audit/Pay Committees Terms of Reference.		✓		
	8	Approve Trust’s Scheme of Delegation.		✓		
	9	Approve schools joining the Trust.		✓		
Central Services	10	To determine the scope and charge of mandatory core services to be delivered by the Trust on behalf of its schools.		✓		
	11	To identify those additional services to be procured on behalf of individual schools.		✓		
	12	To ensure centrally procured services provide value for money.		✓		
	13	To ensure the Trust website is up-to-date and adheres to all statutory requirements via Central Team.		✓		
Curriculum	14	To develop a curriculum policy within the framework of the Trust’s overall strategic intents.			✓	✓
	15	To implement curriculum policy.			✓	✓
	16	Responsibility for standards of teaching.		✓		
	17	Accountability for standards of teaching.			✓	✓
	18	Responsibility for individual child's education.		✓		
	19	Accountability for individual child's education.			✓	✓
	20	Provision of sex education - to establish and keep up to date a written policy within Trust’s framework.			✓	✓
	21	To prohibit indoctrination and ensure the balanced treatment of controversial issues.	✓	✓	✓	✓
	22	To establish a charging and remissions policy for activities.		✓		
	23	To implement the charging and remissions policy.			✓	✓
Safeguarding	24	Safeguard and promote the welfare of children.		✓	✓	✓

	25	Have regard to any statutory guidance on safeguarding issued by the Secretary of State.		✓		
	26	Ensure the suitability of staff, supply staff, volunteers, contractors and proprietors.		✓	✓	✓
	27	To establish a safeguarding policy.		✓		
	28	To implement the safeguarding policy.			✓	✓
	29	To review annually the safeguarding policy.		✓		
SEND	30	Have regard to any statutory guidance related to SEND issued by the SOS	✓	✓	✓	✓
	31	To establish a SEND policy		✓		
	32	To implement the SEND policy			✓	✓
	33	To review annually the SEND policy		✓		
Performance Management	34	To establish an appraisal policy.		✓		
	35	To implement the appraisal policy.			✓	✓
	36	To review annually the appraisal policy.		✓		
Target setting	37	To propose targets for pupil achievement (Chief Executive and Headteacher).				✓
	38	To agree targets for pupil achievement.			✓	
	39	To monitor pupil achievement against targets.		✓	✓	
	40	Responsibility for pupil outcomes.		✓		
	41	Accountability for pupil outcomes.			✓	✓
Behaviour	42	To establish a behaviour policy.		✓		
	43	To implement the behaviour policy.		✓	✓	✓
	44	To review annually the behaviour policy		✓		
Attendance	44	To establish an attendance policy		✓		
	45	To implement the attendance policy.		✓	✓	✓
	46	To review annually the attendance policy.		✓		
Admissions	47	To devise the Trust's Admission Arrangements.		✓		
	48	To approve consultation on changes to the Trust's admission arrangements and adhere to statutory deadlines.		✓		
	49	To approve the determination of the Trust's admission arrangements and determine within statutory deadlines.		✓		
	50	To determine in year admission applications in relation to difficult to place children and/or children who meet the Fair Access Protocol.				✓
	51	To implement the statutory right of appeal against admission application decisions providing information to the relevant LA.			✓	✓
	52	Approve the admission of children over the published admissions number (PAN).				✓
Religious Education	53	Responsibility for ensuring provision of RE in line with the school's curriculum policy			✓	✓
Collective Worship	54	To ensure that all pupils take part in a daily act of collective worship.			✓	✓
	55	To make an application to the advisory councils, SACRE, concerning the requirements for collective worship (school without a religious character) to dis-apply.			✓	✓
Premises & Insurance	56	Buildings insurance and personal liability.			✓	✓
	57	Developing the Trust's buildings programme.		✓		
	58	Implementing the school's building programme.			✓	✓
	59	Maintaining buildings, including developing properly funded maintenance plan.			✓	✓
Health & Safety	60	To develop a health and safety policy within the Trust's framework.		✓		
	61	To ensure that health and safety regulations are followed.			✓	✓

	62	To implement the Trust's Health and Safety Policy.			✓	✓
school Organisation	63	To publish proposals to change the category of school.		✓		
	64	To set the times of school sessions and the dates of school terms and holidays.		✓		
	65	To ensure that the school opens for pupils for 380 sessions in a school year.			✓	✓
Information for Parents	66	To ensure the school website is up-to-date and adheres to all statutory requirements.			✓	✓
	67	To ensure provision of free school meals to those pupils meeting the criteria.			✓	✓
	68	Adoption and review of home-school agreements.			✓	✓
Policies	69	To determine, on an annual basis, those policies which will be developed by the Trust and mandatory for all Trust schools.		✓		
	70	To ensure copies of all CLT policies and procedures are disseminated to staff and implemented.			✓	✓
Exclusions	71	Power to exclude.				✓
	72	To consider an exclusion.			✓	
Human Resources and staffing	73	For the delegation of Human Resources and staffing functions please refer to Human Resources functions.				