



UNIVERSITY OF
LINCOLN

ACADEMY TRUST

Scheme of Delegated Authority

2026-2027

The Scheme of Delegated Authority (SoDA) is a key document in terms of the efficient and effective management of the Trust and it is reviewed annually. University of Lincoln Academy Trust has always sought to delegate to its executive staff a high level of responsibility, whilst ensuring it can monitor the work of the Trust and its academies in a supportive but challenging manner. The Chief Executive Officer (CEO) is also the Accounting Officer for the Trust and is a Trustee/Director. This enables the CEO to sign on behalf of the Trustees, where appropriate.

Trustees recognise that the senior executive team are very experienced with a good track record and need the flexibility to respond quickly to ensure the best educational provision is provided at all times. There will be regular discussions between different levels of the Trust, especially the Chair and the CEO of the Trust before decisions are made.

The DfE requirement is to separate functions and prohibit crossover between Trust and Academy Monitoring Committee membership. The Trust sees academy monitoring as an important aspect of the Trusts work and the CEO provides the link between both groups.

Where the document refers to an Academy, this can be taken to refer to all academies within the Trust, at that time.

The following table sets out the main Trust functions and where authority has been delegated to. The Board of Trustees delegate the majority of decisions, with some reserved solely for that of Members and are not in the gift of Trustees to change.

The list below provides details of abbreviations used for boards, committees and posts that hold delegated authorities.

M	Members
C	Chair of the Trust
T	Trustees
ARC	Audit & Risk Committee
CSC	Curriculum & Standards Committee
FGP	Finance & General Purposes Committee
PC	People Committee
AMC	Academy Monitoring Committees
CEO	Chief Executive Officer (Accounting Officer)
DPE	Director of Primary Education
P/EP	Principal/Executive Principal
CFO	Chief Financial Officer
HoP	Head of People and HR
DSA	Director of Safeguarding and Attendance

In the absence of a post holder (due to incapacitation, or as a vacancy), responsibility will fall to the most appropriate member of the Executive Leadership Team (as confirmed by the CEO). Where there are successor posts to those named above, they will assume the same delegations, unless amended by the Board of Trustees.

[illegible]

Activity	M	C	T	ARC	CSC	FGP	PC	AMC	CEO	DPE	P/EP	HoP	DSA	CFO
Maintain operational responsibility for the Trust's central risk register														✓
Maintain operational responsibility for academy risk registers											✓			
Appointments and dismissals														
Appointment of Members	✓													
Appoint and removal of Trustees (Directors for Companies House purposes)	✓													
Appointment and dismissal of the CEO			✓											
Appointment and removal of CEO as a Trustee	✓													
Appointment and dismissal of the CFO, DPE, HoP, DSA & Governance Professional		✓												
Recruitment process of the CEO, CFO, DPE, HoP, DSA & Governance Professional							✓							
Recruitment process, appointment of executive central staff beyond the approved budget/'top slice'		✓												
Recruitment process, appointment and dismissal of academy Governance Professionals											✓			
Appointments and dismissals														
Recruitment process, appointment and dismissal of Primary Academy Principals									✓					
Recruitment process, appointment and dismissal of Secondary Academy Principals									✓					
Recruitment process, appointment and dismissal of the Trust Finance Manager & other central finance staff									✓					✓
Recruitment process, appointment and dismissal of Vice Principals									✓	✓				
Recruitment process, appointment and dismissal of Assistant Principals									✓	✓	✓			
Recruitment process, appointment and dismissal of all other teaching staff											✓			
Recruitment process, appointment and dismissal of all other support staff											✓			
Recruitment process, appointment and dismissal of all other central Trust non-executive staff									✓					
Staff Remuneration and Remuneration														
Approval of the CEO, CFO, DPE, HoP, DSA, Principals and Governance Professional annual performance targets and remuneration							✓							
Conduct the performance management review of the CEO and make recommendations to the People Committee on Annual Performance Targets and Remuneration		✓												
Setting of the CFO, DPE, HOP, DSA, and Principals annual performance targets									✓					
Setting of the Governance Professional annual performance targets (in discussions with the Chair of Trustees)												✓		
Conduct performance management reviews for Primary Academy Principals										✓				
Conduct performance management reviews for Secondary Academy Principals									✓					
Conduct performance management reviews/setting of remuneration of the Trust Finance Manager and other central trust finance staff.														✓
Conduct performance management reviews/setting of remuneration of the Trust HR Staff												✓		
Conduct performance management reviews/setting of remuneration of the Trust Estates Staff														✓
Conduct performance management reviews/setting of remuneration of the Trust IT Staff									✓					
Conduct performance management reviews/setting of remuneration for Vice Principals											✓			
Conduct performance management/setting of remuneration for all other central Trust non - executive staff									✓					
Conduct performance management/setting of remuneration for all other academy staff											✓			

Activity	M	C	T	ARC	CSC	FGP	PC	AMC	CEO	DPE	P/EP	HoP	DSA	CFO
Contracts of Employment														
Creation/change of contracts of employment for CEO, CFO, DPE, HoP, DSA and Governance Professional							✓							
Creation/change contracts of employment for the Trust Finance Manager and other central finance staff														✓
Change contracts of employment for all other central non-executive trust staff									✓					
Creation/change contracts of employment for Trust IT staff									✓					
Creation/change contracts of employment for Trust Estates staff														✓
Change contracts of employment for teaching staff											✓			
Change contracts of employment for support staff											✓			
Offer employment and creation of new posts for non-executive staff outside of approved budget forecasts (minimum of two approvals, with the CFO being mandatory)									✓	✓				✓
Offer employment for executive staff outside of approved budget forecasts.									✓					
Offer employment where differing from an advertised post (approval must be sought from the CFO, along with either CEO or DPE)											✓			
Approve staff severance payments up to £20,000									✓					
Approve staff severance payments up to £50,000			✓											
Approve staff severance payments over £50,000 (DfE approval must also be sought)			✓											
Curriculum														
Ensure curriculum offer fulfils legal requirements											✓			
Admission Arrangements														
Ensure there is an admissions policy which conforms to legislation and this is freely available to parents/carers and potential pupils/students			✓											
Admission application decisions and appeals								✓						
Safeguarding/Child protection/Behaviour/Wellbeing														
Ensure there is a positive rewards scheme for success and effort in all aspects of educational experience including academic, cultural and sporting activities.											✓			
Establish and implement an attendance policy which includes the provision of appropriate sanctions and rewards			✓						✓		✓		✓	
Establish and implement a behaviour, including drugs and social media, policy with appropriate sanctions and rewards					✓						✓		✓	
Ensure the implementation of the safeguarding policy and best practices are followed to meet current legislation and local authority guidance			✓						✓				✓	
Exclude a student on a fixed term basis											✓			
Exclude a student permanently											✓			
Review appeals against exclusions								✓						
Education														
Approval of educational targets					✓									
Ensure pupil progress is a priority and is closely monitored					✓						✓			
Approval of SEND arrangements					✓						✓			
Allocation of support for pupils with special needs											✓			
Allocation of Pupil Premium funding											✓			

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Activity	M	C	T	ARC	CSC	FGP	PC	AMC	CEO	DPE	P/EP	HoP	DSA	CFO
Authorise the disposal of assets (excluding land and buildings) with a net book value above £1,000, but below £10,000									✓					
Authorise the disposal of assets (excluding land and buildings) with a net book value above over £10,000				✓										
Leases														
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			✓											
Financial Write-offs														
Write-off debts below £1,000									✓					✓
Write-off debts between £1,000 and the smaller of 1% of annual income or £45,000 per transaction (to a maximum of £250,000 cumulatively (cumulatively of 5% of annual income per cat.))			✓											
Approval of debt write-offs above £250,000 (prior to DfE approval)			✓											
Procurement														
Ensure payments adhere to contractual commitments, the Trust's policies and HMRC requirements														✓
Authorise academy purchases up to £20,000											✓			
Authorise academy purchases between £20,000 and £50,000									✓					
Authorise central Trust purchases up to £20,000														✓
Authorise central Trust purchases up to £50,000									✓					
Authorise purchases within budget for recurring operational expenditure											✓			
Accept tenders and authorise contracts for goods, works and services up to £20,000 in value.									✓					
Accept tenders and authorise contracts for goods, works and services over £20,000 and up to £50,000 in value						✓								
Accept tenders and authorise contracts for goods, works and services over £50,000 in value			✓											
Authorise long term contract commitments up to three years									✓					
Authorise long term contract commitments over three years and the Trust finance limits			✓											
Ensure receipt and custody of all tenders														✓
Approve procurement projects over £50,000			✓											
Make payments only when goods have been received to the correct price, quantity and quality standard														✓
Approve applications for business/credit cards						✓								
Approve credit card spend of up to £1,000 per transaction											✓			
Approve credit card spend of over £1,000 per transaction									✓					✓
Ensure compliance for related party transactions with an annual spend below £100														✓
Ensure compliance for related party transactions with an annual spend between £100 and £2,500				✓										
Ensure compliance for related party transactions with an annual spend above £2,500 in conjunction with DfE notification and reporting requirements			✓											
Financial Compliance														
Notify the Trustees of any significant matters affecting the Trust financial outlook, including payments to employees and funding levels						✓								

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