Tyne and Wear Learning Trust

Scheme of Delegation

September 2026

Contents:

Statement of intent

1. Legal framework
2. Responsibilities of the members
3. Responsibilities of the trust board
4. Delegated powers of the accounting officer
5. Delegated powers of the Audit, Risk, Estates and Finance Committee
6. Delegated powers of the headteacher
7. Delegated powers of the CFO
8. Delegated powers of other school staff
9. General financial management
10. Monitoring and review

Appendix
Authorisation Levels

Statement of intent

In accordance with the 'Academy trust handbook' (ATH), this document outlines the delegation of the trust's functions and financial powers within Tyne and Wear Learning Trust.

This document has been implemented to ensure the trust's funds are used sensibly and in accordance with statutory guidance, and to clearly outline the responsibilities delegated by the board of trustees.

The academy is committed to providing a high standard of education and care, whilst ensuring that value for money is achieved. The internal control systems outlined in this document will be implemented at all times with the aim of the ensuring that the trust acts in an effective and transparent manner.

This October 2026 revision is prepared for approval by the board of trustees. The scheme will be reviewed annually and following relevant changes to the trust's management or organisational structure. Delegation does not remove the board's overall accountability.

Legal framework

This policy has due regard to all relevant legislation and statutory guidance including, but not limited to, the following:

- DfE (2026) 'Academy trust handbook 2026', effective from 1 October 2026, including the clarification published on that date.
- The Companies Act 2006
- DfE 'Academy trusts: governance guide' (updated 20 July 2026)
- The Procurement Act 2023 and associated regulations, subject to transitional provisions
- DfE 'Keeping children safe in education 2026' and current 'Working together to safeguard children'.
- DfE school estate management standards and digital and technology standards
- The trust's articles of association, funding agreements and the current Academies Accounts Direction

This policy operates in conjunction with the following school policies:

- Gifts and Hospitality Policy
- Tendering and Procurement Policy
- Lettings Policy
- Asset Management Policy

1. Responsibilities of the members

In regard to the trust's accounts, the members are responsible for appointing external auditors, other than where the Companies Act 2006 permits the trustees to appoint.

In accordance with the letter of engagement, the members will vote on any proposals to remove external auditors – reasons for removing an auditor must be provided.

Members will receive the audited annual report and accounts and use their powers under the articles and company law to hold the board accountable. Members must not be employees or occupy staff establishment roles, including unpaid roles; the trust must check that members are not prohibited by a section 128 direction.

2. Responsibilities of the trust board

The board will approve a written Scheme of Delegation which maintains robust governance and financial controls. It will be reviewed annually and at the next available board meeting following a management or organisational change affecting its effectiveness. Overall responsibility for the trust's funds cannot be delegated.

The board is responsible for ensuring that the trust is operating in accordance with the law, its articles of association, its charitable objects, its funding agreement and the ATH.

The proper stewardship of academy funds, including regularity and propriety, as well as ensuring that value for money is achieved in order to maximise outcomes for pupils, is the responsibility of the board.

The board retains strategic accountability for safeguarding, SEND, inclusion, pupil welfare, admissions, place planning and a safe, well-maintained estate. The CEO will coordinate implementation and school-level assurance, with headteachers responsible for day-to-day arrangements.

The board will designate a trustee or committee to support oversight of inclusion, including SEND. The CEO will establish a consistent trust-wide approach to early identification, provision and deployment of expertise, and report on access, participation and outcomes for pupils with SEND, disadvantaged pupils and pupils known to social care.

The CEO will ensure the trust fulfils its duties to cooperate with local authorities and agencies and works constructively on inclusion, sufficiency and place planning. Relevant requests to develop or adapt provision will receive timely, transparent consideration.

The board will obtain assurance on Keeping children safe in education 2026 and current Working together guidance, including safer recruitment, suitability checks and filtering and monitoring. Headteachers will implement school arrangements and report significant concerns promptly through trust safeguarding procedures.

The board will assure compliance with the allergy safety duties applying from September 2026, including an annually reviewed allergy safety policy published on each school's website and publicised to staff and pupils. Headteachers will implement medical support arrangements, staff training and relevant statutory guidance.

The board will assure compliance with the limit on branded uniform and PE kit items from 1 September 2026 and have regard to statutory guidance on uniform costs.

Before the new financial year, the board will approve and minute a balanced budget for the year ending 31 August, including any use of unspent funds brought forward. It will also approve and minute significant budget changes.

The board will consider monthly management accounts whenever it meets, scrutinise budget variances and ensure timely action to maintain financial viability. Board meetings will take place at least three times a year.

All capital plans for the trust, as recommended by the Audit, Risk, Estates and Finance Committee, will be received and approved by the board on an annual basis.

A Declared Conflicts of Interests Register for all board members and staff with financial responsibilities will be kept and maintained by the board.

The board of trustees is responsible for the following:

External audit

- Appointing an Audit, Risk, Estates and Finance Committee to advise the board on the adequacy of the trust's internal control framework, including financial and non-financial

controls and risk management arrangements, to direct a programme of internal scrutiny and to consider the results and quality of external audit.
- Appointing external auditors, where the Companies Act 2006 permits it to do so – and notifying the DfE when an auditor is removed or resigns.
- Receiving the reports from the external auditor.
- Cooperating with risk management auditors and managers and implementing reasonable recommendations where necessary.
- Ensuring there is an appropriate, reasonable and timely response to the auditor's findings.
- Ensuring that the external audit contract is retendered at least every five years and that the Audit, Risk, Estates and Finance Committee fulfils the external audit oversight duties in ATH 2026 paragraph 4.17.

Liaising with the DfE

- Obtaining DfE approval before any offer where special severance is £50,000 or more gross; where an exit package of £100,000 or more includes special severance; where the employee earns over £174,000; or where the payment is novel, contentious or repercussive. A confidentiality clause accompanying special severance requires prior DfE approval. Non-statutory or non-contractual compensation of £50,000 or more also requires prior approval.
- Informing the DfE if it suspects any irregularity affecting resources.
- Obtaining approval from the Secretary of State via the DfE for the following transactions which are beyond the limits specified in the ATH:
    - Borrowing and other transactions for which prior approval is required under the ATH
    - Writing off debts and losses
    - Entering into guarantees, letters of comfort and indemnities
    - Acquiring or disposing of freehold land or buildings, and other land transactions requiring prior approval under the ATH and funding agreement
- Cooperating with the DfE if they require financial information to help inform any audits of the trust they may undertake.
- Seeking approval from the DfE for any novel, contentious or repercussive investments.
- Seeking approval from the DfE for ex-gratia transactions.
- Notifying DfE through the customer help portal within 14 calendar days of the board meeting if proposing a current-year revenue deficit budget which cannot be addressed using unspent funds from previous years.
- Complying with any Notice to Improve, any revocation of delegated authorities, and any Secretary of State direction issued under the funding agreement.

Approval and authorisations

Approving and publishing whistleblowing procedures on the trust website, ensuring staff understand the process and protections, and responding properly and fairly to concerns. At least one trustee and one member of staff will be designated as contacts.

- Scrutiny, review and oversight

- Reviewing and approving the three-year budget forecast return before the statutory deadline for submission to the DfE.
- Maintaining complete, accurate and up-to-date records of all financial arrangements.
- Ensuring that all academies within the trust are following the recommended operational and internal controls provided by the board.
- Keeping records pertaining to related party transactions, to highlight that all transactions have been conducted in accordance with the high standards of accountability and transparency.
- Preparing and monitoring sustainable financial plans, using realistic assumptions, termly scrutiny of pupil numbers and integrated curriculum and financial planning. The board will approve a reserves policy and explain its reserves management plan in the annual report.
- Maintaining the trusts and academies' fixed asset registers and reviewing the trust risk register at least annually, informed by the Audit, Risk, Estates and Finance Committee and updated for significant emerging risks.
- Reviewing financial reports prior to the submission of the audited financial statements to the Secretary of State by the statutory deadline each year.
- Including contingency and business continuity planning as part of risk management procedures.
- Ensuring sound internal control, risk management and assurance processes are in place.
- Ensuring the protocol and requirements for managing related party transactions are followed and applied across the trust.
- Where general annual grant is pooled, considering each academy's funding needs and allocations and maintaining an appeals mechanism, with unresolved appeals capable of escalation to DfE. PFI funding must not be pooled.

The CFO will prepare for board approval and publish, by 31 January alongside the annual accounts, a summary statement explaining how funds are distributed across schools. It will match the accounts notes on central services and funds and cover the themes in DfE's example statement.

- Ensuring adequate insurance cover is obtained in compliance with legal obligations or that the trust is a member of the academies risk protection arrangement.
- Ensuring the governance statement meets the requirements of the ATH.
- Ensuring executive pay and benefits are determined through a robust, documented, evidence-based process with independent scrutiny and board approval. No individual will decide their own remuneration. Executive remuneration must not rise faster than teachers' remuneration without a clear justification and prior DfE approval.
- Reviewing and approving all gifts received by executive leaders in line with the academy's Gifts, Hospitality and Anti-Bribery Policy.
- Ensuring the analysis of pay information to identify and explore any gender pay gaps, challenges to achieving pay equality in the trust and any successes.

Appointing staff

- Appointing an Audit, Risk, Estates and Finance Committee, in line with the following requirements:

- The trust will have a dedicated Audit, Risk, Estates and Finance Committee or, where annual revenue income does not exceed £50 million, may combine it with another committee. Above £50 million, a dedicated committee is required.
- The Audit, Risk, Estates and Finance Committee will meet at least three times a year
- The Audit, Risk, Estates and Finance Committee will oversee and approve independent, risk-based internal scrutiny of financial and non-financial controls, with work spread across the year. Findings will be made available promptly to all trustees, with recommendations and management responses monitored.
- With a clear term of reference in place, which outlines the role of the Audit, Risk, Estates and Finance Committee, including advising on the adequacy of financial and other controls and risk management arrangements in the trust. The committee must also direct a programme of internal scrutiny and consider the results and quality of any external audit

Employees should not be Audit, Risk, Estates and Finance Committee members; the CEO and CFO should attend to provide information. The chair of trustees should not chair this committee. At least one member should have relevant accountancy or audit assurance experience, and other members should receive appropriate financial training.

- Appointing a senior executive leader, who will also be the trust's accounting officer
- When a senior executive leader (accounting officer) is planning to leave the trust, the board will approach their Regional Director in advance to discuss their structure and options, including plans for recruitment.

The board will delegate appraisal across the trust to the relevant senior leader or relevant committee via the scheme of delegation.

If DfE issues a Notice to Improve, the CFO will arrange publication on the trust website within 14 days of the date notified by DfE as its publication date. It will remain published until DfE lifts the notice.

The board will approve executive and senior leadership appointments. For new appointments from 1 October 2026, prior DfE approval is required before advertising where remuneration exceeds £174,000 (or its part-time pro rata equivalent), or performance-related pay exceeds £25,000.

The chair of the board of trustees and the accounting officer is responsible for ensuring that their capacity to control and influence does not conflict with the requirements for managing related party transactions.

The board will notify DfE as soon as possible of fraud, theft or irregularity exceeding £5,000 individually or cumulatively in a financial year. Unusual fraud will be reported regardless of value. The trust will maintain proportionate preventative controls and take appropriate action on suspected incidents.

3. Delegated powers of the accounting officer

The CEO is the trust’s senior executive leader and accounting officer. This role will not rotate, so that accountability for financial management and integrity remains clear.

The accounting officer is personally responsible to Parliament, the public and to the DfE for the financial resources under the trust's control. This does not remove the responsibility of the trustees for the proper conduct and financial operation of the trust.

The accounting officer is personally responsible for assuring the board of trustees that the trust is compliant with the ATH and the funding agreement.

The accounting officer is required to advise the board of trustees in writing if, at any time, in his or her opinion, any action or policy under consideration by them is incompatible with the terms of the articles, funding agreement or the ATH.

The accounting officer will advise the board in writing if the board is failing to act where required to do so by the terms and conditions of the ATH or funding agreement.

If, after considering the board's reasons, the accounting officer still considers that the proposed action breaches the articles, funding agreement or ATH, they will notify DfE's accounting officer immediately and in writing.

Each year, the accounting officer is required to complete and sign a statement on regularity, propriety and compliance, which is submitted to the DfE along with the audited accounts.

Each year, the accounting officer is required to share the annual 'Dear Accounting Officer' letter from the DfE with the trust's members, trustees, chief financial officer and other members of the senior leadership team. They must also arrange for it to be discussed by the board of trustees and act where appropriate to strengthen the trust's financial system and controls.

The accounting officer will demonstrate value for money and notify the board when the trust's ability to operate as a going concern is at risk. Trustees will take ownership of the response, including notifying DfE.

4. Delegated powers of the Audit, Risk, Estates and Finance Committee

The Audit, Risk, Estates and Finance Committee exercises only powers expressly delegated by the board and recorded in its terms of reference. Its oversight of internal scrutiny is distinct from day-to-day financial management; the board retains overall accountability.

The Audit, Risk, Estates and Finance Committee will meet as regularly as necessary, but at least once a term.

Information regarding the financial performance of the trust will be reviewed by the committee at least three times a year, taking necessary action to ensure ongoing viability.

The committee is responsible for reviewing the academy's financial statements and highlighting any significant issues to the board of trustees, prior to submission to the Secretary of State.

At each meeting of the board of trustees the Audit, Risk, Estates and Finance Committee will report on decisions taken under their delegated powers.

The Audit, Risk, Estates and Finance Committee is responsible for reviewing the reports of the CFO regarding the effectiveness of the academy's financial procedures and controls, reporting any findings to the board of trustees.

The annual budget will initially be reviewed by the Audit, Risk, Estates and Finance Committee prior to the start of the financial year and its acceptance, or otherwise, will be given to the board of trustees.

The committee will report all significant financial matters and any potential overspending to the board of trustees.

The trust's capital development plan will be reviewed on an annual basis.

The Audit, Risk, Estates and Finance Committee is responsible for ensuring that appropriate insurance arrangements are in place for the academy.

Internal scrutiny must be independent of the senior leadership and finance teams. The committee will receive reports at each meeting and an annual summary; the summary will be submitted to DfE by 31 December alongside audited accounts. Where revenue income exceeds £50 million, internal scrutiny must use an in-house or bought-in internal audit service.

The purchase of goods and services, in line with the agreed authorisation levels outlined in Appendix A, will be authorised by the Audit, Risk, Estates and Finance Committee and reported to the trust board.

Expenditure on goods and services between £30,000 and £100,000 will be authorised by the Audit, Risk, Estates and Finance Committee under the board-approved authorisation schedule. This internal limit does not replace procurement law or any requirement for prior DfE approval.

The Audit, Risk, Estates and Finance Committee will direct the authorisation for goods and services, as necessary, in line with Appendix A.

The Audit, Risk, Estates and Finance Committee will advise the board on the risk register, review ratings and responses, and use these to inform the annual internal scrutiny programme.

5. Delegated powers of the headteacher

The day-to-day financial management of the academy and its staff is the responsibility of the headteacher, ensuring that the arrangements for the collection of income, purchasing of goods and services, payments and academy assets are in accordance with statutory regulations.

The headteacher will prepare a draft budget, in collaboration with the delegated financial officer and CFO, prior to final approval to the board of trustees.

Management accounts will be reviewed by the headteacher, in collaboration with the CFO, with potential overspending highlighted to the Audit, Risk, Estates and Finance Committee and board of trustees.

The headteacher is responsible for planning, preparing and annually updating a three-year strategic plan in line with the academy's SDP, in collaboration with the CEO and CFO.

The headteacher is responsible for preparing a five-year capital plan for recommendation to the board of trustees, in collaboration with the CFO.

Headteachers will provide evidence on site condition, statutory compliance and urgent risks to inform the trust's estates strategy. The CEO and CFO will coordinate strategic estate management, apply DfE's school estate management standards, and report significant risks to trustees. The board will oversee sustainability leadership and regularly updated climate action plans.

The headteacher will ensure that all conflicts of interest concerning staff members with financial responsibility are declared and accurately recorded.

The headteacher is responsible for ensuring that all academy bank account spending is in accordance with the specified authorisation levels.

In liaison with the CFO, or delegated financial officer, the headteacher certifies the payment of salaries each month and authorises any necessary overtime.

Annual pay awards, including those in relation to non-teaching staff, will be reviewed on an annual basis by the headteacher and recommendations for approval to the board of trustees will be made.

The headteacher is responsible for ensuring that full, accurate and up-to-date records are maintained in relation to the academy's finances, and that these are available for audit by the external auditor.

In conjunction with the delegated financial officer and other authorised signatories, the headteacher is responsible for signing cheques on behalf of the academy.

6. Delegated powers of the CFO

The CFO is responsible for the management of the trust's financial position at a strategic and operational level within the framework of financial control, as determined by the board of trustees, maintaining effective systems of internal control within the trust.

Academies' financial administrators work closely with the CFO to ensure efficient and effective day-to-day management of the academy's finances, liaising with the Audit, Risk, Estates and Finance Committee and board of trustees as appropriate.

The CFO is responsible for ensuring there are appropriate division of duties between staff responsible for processing orders, receiving deliveries and processing payments.

The CFO will ensure required returns, including the budget forecast return and annual resource management self-assessment, are submitted to DfE by the published deadlines, with board approval where required.

The CFO is responsible for ensuring that all income and expenditure is accurately accounted for in the trust's financial system.

The CFO will prepare and present an annual trust budget to the Audit, Risk, Estates and Finance Committee prior to the start of the year, following collaboration with the academies' headteachers and delegated financial officers.

In liaison with the headteacher and delegated financial officers in academies, the CFO certifies the payment of salaries each month and authorises any necessary overtime.

The CFO is responsible for notifying the payroll provider of any matters affecting payments to employees.

The CFO will prepare monthly management accounts showing income and expenditure against budget, cash flow forecasts and a balance sheet. Accounts will be shared with the chair monthly, with other trustees at least bimonthly, and considered by the board whenever it meets.

The CFO is responsible for maintaining the trust's fixed asset and risk registers.

In conjunction with the headteacher and other authorised signatories, the CFO is responsible for signing cheques on behalf of the trust.

The CFO is responsible for maintaining a record of all contracts entered into by the trust, including details of payments, quotes obtained and invoices received.

The CFO will ensure pension arrangements comply with TPS, LGPS and HM Treasury's Fair Deal guidance. Any proposed alternative to TPS or LGPS must be referred to DfE early in planning, before communication to staff, and approved before implementation.

Any electric vehicle salary-sacrifice scheme will follow DfE guidance and document comprehensive mitigations ensuring no cost or liability falls on the trust if an employee defaults. Prior approval is not required only where those mitigations are in place, and the trust is not under a Notice to Improve.

Where appropriate, the CFO will advise headteachers and the Audit, Risk, Estates and Finance Committee on purchasing decisions.

7. Delegated powers of other school staff

Designated staff members will be delegated financial responsibility to support the headteacher with the maintenance of the financial controls and procedures in operation at the academy.

Staff members with financial responsibility are aware of the financial regulations which they must act in accordance with.

The following members of staff are authorised to receive and check goods on behalf of the academy:

- Budget holders
- Administrators nominated by the budget holder

Appointed budget holders are responsible for checking and certifying monthly statements of expenditure against the delegated budget, reporting any potential overspending to the CFO.

Staff members will notify the CFO of any eventuality that could affect the academy's insurance arrangements, such as a school trip.

All staff members with financial accountability are responsible for maintaining accurate and up-to-date records regarding their actions in relation to the academy's finances.

8. General financial management

Where the trust's transactions go beyond the specified delegated authority limits, prior approval from the DfE will be sought, regardless of the source of funds.

Prior DfE approval will be obtained for borrowing, including overdrafts, where repayment uses grant monies or security is provided over grant-funded assets. Finance leases on DfE's approved list are excepted; other finance leases require prior approval.

Required DfE or HM Treasury approvals will be obtained before a transaction is agreed or occurs, using the DfE customer help portal or the specified reporting form. Sufficient time will be allowed for consideration.

All trust funds, including those involving credit cards and online banking, will only be used for business expenditure and all balances will be cleared before interest accrues.

All members of the board of trustees who hold delegated powers are responsible for ensuring that:

- There is probity in the use of public funds.
- Spending decisions represent value for money.
- Internal delegation levels are always applied within the trust.
- A competitive tendering policy is implemented.
- The Procurement Act 2023, associated regulations, current procurement thresholds and Find a Tender requirements will be observed, with relevant transitional rules applied to existing procurements.

The CFO will ensure DfE purchasing opportunities are considered and decisions recorded. Supply staffing must use the Government Commercial Agency Supply Teachers and Education Recruitment framework unless a compliant alternative has rates no higher than the framework.

At energy contract renewal, the trust must use DfE's Energy for Schools service or an approved energy deal unless an alternative of equivalent value for money has been sourced and evidenced.

MIS contracts must move to DfE's MIS framework as soon as practicable after launch, planned for September 2027, in line with current contract expiry. Pre-launch extensions must not exceed 12 months; new pre-launch procurements must include DfE's MIS Core Principles. Extension options must not delay transition where contracts run beyond launch.

- Relevant professional advice is obtained, where appropriate.

Transactions requiring disclosure will be reported in accordance with the current Academies Accounts Direction, applicable financial reporting standards and Charities SORP, regardless of whether DfE approval is required.

Relevant financial procedures implemented within the trust are outlined in the following academy policies:

- Academy Pay Policy
- Gifts, Hospitality and Anti-Bribery Policy
- Tendering and Procurement Policy
- Lettings Policy
- Asset Management Policy

The CEO will coordinate proportionate cyber security controls and incident response, with headteachers implementing school arrangements. The board will monitor progress towards DfE's six core digital standards by 2030 and obtain assurance that filtering and monitoring standards are already met. No ransom or extortion demand may be paid.

Special payments will be disclosed in accordance with the current Academies Accounts Direction. The trust will retain its appraisal, legal advice where relevant, decision rationale, evidence of value for money and required approvals.

The trust recognises that special payments include the following:

- Staff severance payments
- Compensation payments
- Ex gratia payments

Ex gratia, extra-statutory, extra-contractual and extra-regulatory payments will always be referred to DfE for prior approval. Novel, contentious or repercussive transactions also require prior approval regardless of value.

All severance proposals will follow ATH 5.7–5.14 and DfE and HM Treasury guidance. Payments must not reward failure; justified settlements must be below the assessed likely award. A settlement should not be offered where legal assessment indicates at least a 50% chance of defending the case successfully. Confidentiality clauses must not restrict protected disclosures or DfE's access to information.

Compensation payments require a careful appraisal and legal advice where relevant. The trust may approve a non-statutory or non-contractual element below £50,000; an element of £50,000 or more requires prior DfE approval, subject also to the requirements for novel, contentious or repercussive payments.

Members, trustees, local governors, the accounting officer, senior employees and other staff with financial responsibility will declare relevant business and financial interests, including interests arising through close family relationships. The trust website will publish the interests of members, trustees, local governors and the accounting officer, including nil returns where applicable; publication of other staff interests is discretionary.

All members, trustees, local governors, employees and their relations, and organisations are responsible for ensuring that their connections to the trust are not used for personal financial gain.

All related-party contracts and agreements will be reported to DfE before commencing or being renewed. Prior approval is required for supply to the trust exceeding £40,000 in the financial

year, subject to ATH 5.43 exceptions, and for any novel, contentious or repercussive related-party transaction regardless of value.

Prior DfE approval will be obtained for the following transactions beyond ATH 5.20 limits: the lower of 1% of annual income or £45,000 per transaction, and cumulatively per category the lower of £250,000 or 5% of annual income (2.5% where timely, unqualified accounts have not been submitted for the previous two financial years):

- Writing-off debts and losses
- Entering into guarantees or letters of comfort
- Entering into indemnities which are not in the normal course of business.

The trust will pursue recovery of sums owed, including overpayments and erroneous payments, subject to practical and legal limits. Write-offs will follow careful appraisal and reasonable recovery action, with gross amounts tested against the delegated limits before insurance or RPA recoveries.

No payments will be made to trustees unless such payments are permitted by the trust's articles of association or by express authority from the Charity Commission and the payments comply with the terms of any agreements entered into with the Secretary of State.

In accordance with the specified authorisation levels in Appendix A, prior approval will be obtained for purchases and payments as necessary, including from external parties such as the DfE and Charity Commission.

For the related parties specified in ATH 5.46, the element of cumulative annual supply above £2,500 must be at no more than full cost, subject to ATH exceptions. Relevant agreements will be openly and fairly procured and include open-book terms allowing the supplier's costs to be verified.

Agreements subject to the ATH related-party at-cost requirements will be supported by a supplier statement of assurance confirming that charges do not exceed full cost, including direct costs and a proportionate share of overheads, without profit. These requirements do not apply automatically to every commercial supplier.

The governance professional will ensure changes to mandatory governance information are notified to DfE through GIAS within 14 calendar days and update the trust website and Companies House as required. All mandatory GIAS fields will be completed and maintained.

9. Monitoring and review

The board will review this document annually, on publication of changes to the ATH or relevant DfE guidance, and at the next available meeting following changes to management or structure affecting its effectiveness.

Any changes to this policy will be communicated to members of staff by the headteacher.

The scheduled review date is October 2027, or earlier if required. Approval of this revision will be recorded in the board's minutes.

This document must be read alongside the board-approved governance delegation and authorisation schedules. The attachment supplied for this revision contains no Appendix A authorisation table. The board must confirm and attach its current approved schedule before this revision is adopted; no additional spending limit is created by this document.