



Scheme of Delegation 2025-26

Document Intent

Our Scheme of Delegation (SoD) defines the lines of accountability and responsibility within Shaw Education Trust, to ensure that the Members, Trustees, Executive Leaders, Academy Councillors and Principals understand their roles and responsibilities. Shaw Education Trust reserves the right to delegate and vary levels of accountability according to the performance of an academy.

The SoD is complimented by the following key governance documents:

Role	Essential Key Documents
All	• SET Governance Handbook Parts Two and Three • Academy Trust Governance Guide • Academy trust handbook 2025: effective from 1 September 2025 - GOV.UK • The Nolan Principles • The Vision and Values of the Shaw Education Trust
Members	• SET Articles of Association
Trust Board and Sub- Committees	• The Trust Board's Terms of Reference – please see the SET Governance Handbook Part Two • The Essential Trustee • Trustee's Code of Conduct
Local Governance	• SET Governance Handbook Part Three • Code of Conduct for Local Governance

Personnel listed in the Scheme of Delegation : The table below highlights only those individual or team leaders who are mentioned within the SoD. However, all SET central team and academy staff are involved in ensuring that responsibilities within the SoD are carried out.

Personnel listed in the Scheme of Delegation		
ELT	Chief Executive Officer (CEO)	Kerry Inscker
	Chief Finance Officer (CFO)	Michelle Williams
	Chief Education Officer (CEdO)	Neil Warner
	Chief People Officer (CPO)	Vacant
	Chief Infrastructure and Digital Officer (CIDO)	Pete Potts
Directors (with delegated responsibility)	National Director Primary (NDP)	Rachel King
	National Director Special Schools (NDSS)	Melsa Buxton
	National Director Secondary	Sarah Murcott
	Senior Director Raising Standards	Mark Howes
	Senior Director of Governance (SDG)	Beth Barlow
	Director of Safeguarding (DSG)	Brian Duffy
	Director of Estates (DoE)	Chris Williams
	Director of Finance (DoF)	Simon Street
	Director of HR (DHR)	Jo Collingwood
	Director of Digital Services (DSS)	Vacant
	Regional Head of Digital Services (RDS)	Dave Orum and John Lavelle
	Data Protection Officer (DPO)	Pete Potts
	Executive Leadership Team (ELT)	All SET Central Leadership post-holders

KEY:	
Accountable (A)	Post-holder is ultimately accountable for ensuring achievement of the task and is answerable for the outcome of the task or process
Responsible (R)	Post-holder has been delegated the obligation to perform the task or comply with the rule and, where appropriate, of ensuring tasks are completed through their teams
BLANK	No role required within this aspect but may contribute
<i>Italics Blue</i>	Additional, clarifying information
NB – Dual A	Where multiple parties are allocated 'Accountable', Italics Blue detail specific level/area the accountability relates to

Governance and Leadership: Trust Board and Members

Authority of Members:

- Appointment and removal of Members and contribution to appointment and removal of Trustees as required
- Appointment of external auditor in accordance with the Academy Trust Handbook, upon recommendation from the Trust Board
- Can amend the Articles of Association
- Receipt of the Annual Accounts at the Annual General Meeting
- All other areas are delegated to the Board of Trustees

Requirement to comply by Members and all other colleagues with delegated responsibility:

- Ensures effective governance in line with the Governance Handbook and operates within the Seven Principles of Public Life, the 'Nolan Principals'
- Comply with all obligations of the Funding Agreement including the Academies Financial Handbook
- Comply with all regulations affecting the Trust (including charity law, company law, employment law and Health and Safety)
- Operates the Trust and the Academies by the objects outlined in the Articles of Association

	Trustees	CEO	ELT	SLT	AC/IEB	Head
Appointment and removal of Trustees, CEO, Accounting Officer and Clerk to the Trust Board, nominating safeguarding and SEND lead Trustees	A/R					
Define the Trust vision, mission and values in line with charitable objectives and establishes and fosters the trust's culture	A	R	R			
Set the Trust's strategy for setting priorities, creating accountability and monitoring progress towards goals	A	R	R			
Approval of Annual Accounts, appointment of external and internal auditors, approval of Scheme of Delegation	A/R	R	R CFO			
Ensure appropriate Trust-level financial controls so that there is regularity, probity and value for money in the management of public funds	A	A <i>Accounting Officer</i>	R CFO			
Ensure appropriate Director (Trustee) Indemnity Insurance Cover is in place	A		R CFO			
Acquisition of legal entities (including academies) and entering into, or withdrawing from, a formal partnership	A	R	R			
Maintenance of register of interests	A	R	R CFO			
Set the required governance policies, including data protection, information sharing, cyber security, Freedom of Information (FOI), code of conduct, complaints, whistle blowing)	A	R	R ELT	I SDG <i>Ensuring in</i>		

				<i>place</i>		
Ensure effective Trust Board and local governance is in place, supported and quality assured and that their statutory duties are met (including keeping GIAS and websites up-to-date with governance information)	A	R		R SDG	R <i>Academy website & GIAS</i>	A <i>Academy website & GIAS</i>
Recruitment, appointment and removal of Academy Councils, including appointment of the Chair	Delegated	A <i>Approves</i>		R SDG	AR <i>Recommends</i>	R <i>Recommends</i>
Designation of Academy Councillors as links for Safeguarding, SEND and statutory grants (eg Pupil Premium) and ensuring two parents are members of the AC	Delegated	Delegated		A SDG	R <i>Within academy</i>	AR <i>Within academy</i>
Approval of SET Governance Handbook	A	R		R SDG		
Ensure an appropriate Scheme of Delegation (SoD) is in place and adhered to	Delegated	A	R ELT <i>Adherence to SET SoD</i>	R SLT <i>Adherence to SET SoD</i>	R <i>Approval of academy SoD & adherence to SET SOD</i>	AR <i>Production of academy SoD & adherence to SET SoD</i>
Power to act outside of Trust Board usual delegation	A <i>Chairs Powers to Act</i>					
Ensure adherence to trust level policies and approval of and adherence to academy level policies	Delegated	Delegated	AR ELT	R SDG; SLT	R <i>Approval of academy policies & adherence to SET policies</i>	AR <i>Production of and adherence to academy policies & adherence to SET Policies</i>
Safeguarding						
	Trustees	CEO	ELT	SLT	AC/IEB	Head
Ensure a robust Trust Safeguarding & Child Protection Policy (which is compliant with statutory expectations) is in place and adhered to, including appointing a designated safeguarding lead (DSL) for the Trust and in each academy	A	A	A CEdO	R DSG	R <i>Link safeguarding councillor</i>	A <i>Academy DSL and practices</i>
Ensure a policy for managing allegations about staff is in place, including Headteachers and members of the Central Team	Delegated	Delegated	A CPO	R DHR	R <i>Panels & Principal</i>	R <i>Local implementation</i>
Maintain a robust Single Central Register (SCR) as per legal requirements for the Trust and academies	Delegated	Delegated	A CPO	R DHR <i>SET SCR</i>		A <i>Within academy</i>

				DSG <i>In academies</i>		
Ensure an annual safeguarding audit is completed at each academy and reported to the Trust Board periodically	Delegated	Delegated	A CEdO	R DSG	R <i>Receives report</i>	A <i>For academy</i>
Ensure all appointments comply with Safer Recruitment requirements, including using appropriately trained appointment panels and ensuring all required checks are in place prior to commencement of employment, or where appropriate, robust risk assessments are in place	Delegated	Delegated	A CPO	R DHR <i>For central team and academy appointments</i> SDG <i>For Trustee appointments</i>		A <i>For all academy appointments, following SET policy</i>
Ensure all Trust staff/volunteers receive regular and appropriate safeguarding training, relevant to their role and	Delegated	Delegated	A CEdO	R DSG	R <i>SG Link Check</i>	A <i>Within academy</i>
Ensure a robust system for reporting safeguarding concerns is in place, that follow-up actions are recorded and that files related to the protection of children are well-organised and held securely	Delegated	Delegated	A CEdO	R DSG	R <i>SG Link Check</i>	A <i>Within academy</i>
Ensure internet filters and monitoring procedures are in place	Delegated	Delegated	A CIDO	R RDS R DSG	R <i>SG Link Check</i>	I <i>Within academy</i>

High Quality and Inclusive Education

	Trustees	CEO	ELT	SLT	AC/IEB	Head
Production and approval of Trust Education Policies which are monitored for positive impact and embedded into each academy	Delegated	Delegated	A CEdO R ELT <i>Approval</i>	R ND/SD EA Ed <i>Policy management</i>	R <i>Monitor implementation of academy policies</i>	AR <i>Production of academy policies and adherence to SET policy</i>
Ensure accurate academy self-evaluation is in place, which is underpinned by rigorous and robust monitoring which drives strategic planning	Delegated	Delegated	A CEdO	AR ND <i>Within sector</i>	R <i>Receives reports</i>	AR <i>Within academy</i>
Approval of academy development priorities – aligned with Trust strategic objectives	Delegated	Delegated	A CEdO	AR ND/SD <i>Within sector</i>	R <i>Within academy</i>	R <i>Ensure AC approve</i>
Set the strategy for improving and monitoring the performance of academies	Delegated	Delegated	AR	R	R <i>Behaviour,</i>	AR <i>Within academy</i>

including quality of leadership; student achievement; teaching and learning; student behaviour and attendance; personal development and wellbeing.			CEdO	ND/SD <i>Within sector</i>	<i>attendance & personal development</i>	
Reporting of trust and academy performance to Trustees and Academy Councils, and production of data and analysis as required	Delegated	Delegated	A CEdO	R ND/SD <i>Within sector</i>	R <i>Receives reports & feedback to Trust Board</i>	A <i>Academy data quality, reporting to ACs</i>
Ensure that academy curriculum is ambitious for all students, appropriate to sector/ability (including SEND and the most able), and that this impacts positively on student progress and outcomes through rigorous and robust monitoring	Delegated	Delegated	A CEdO	AR ND <i>Within sector</i>		A <i>Within academy</i>
Ensure high quality personal development opportunities are in place for all students, including careers advice (GATSBY/Baker Clause) and that these are tracked to ensure strong participation	Delegated	Delegated	A CEdO	A ND <i>Within sector</i>	I <i>Within academy</i>	A <i>Within academy</i>
Approval of academy trips and visits, including residential in the UK and overseas, and ensuring robust risk assessments are in place, including the appointment of an appropriately trained Educational Visits Coordinator and Trip Leader	Delegated	Delegated	A CEdO <i>International</i>	A ND <i>Ensure process</i>	A <i>UK Residential</i>	A <i>UK trips, appoint EVC, ensure process/approval</i>
Ensure the appropriate levels of support, challenge and intervention are in place to support delivery of strong education outcomes	Delegated	A <i>For C-Suite & ELT</i>	AR CEdO <i>For Heads</i> ELT <i>Appropriate to role & for ELT</i>	AR ND/SD <i>For Heads and schools</i> SLT <i>Appropriate to role</i>	R <i>Feedback to Trust Board</i>	A <i>Within academy</i>
Ensure rigorous, accurate and appropriate assessment systems are in place including compliance with external examinations and SET policy requirements, and that there are reports to parents as appropriate.	Delegated	Delegated	A CEdO	AR ND/SD <i>Within sector</i>	R <i>Effective reporting to parents</i>	A <i>Within academy</i>
Ensure attendance policy and procedures are robust and registers are kept accurately and according to legal requirements	Delegated	Delegated	A CEdO	A ND <i>Registers & procedures</i> SD <i>Policy</i>	R <i>Approval of academy policy & monitoring of implementation</i>	A <i>Within academy</i>
Ensure legal administration of admissions, including management of appeals, and that Pupil Admission Numbers/Commissioned Place Numbers are appropriately approved and adhered to as per funding agreements	Delegated	R <i>Approves PA/CPN and significant change applications</i>	A CEdO	AR ND <i>Significant change applications</i>	R <i>Recommends PAN/CPN</i>	A <i>Within academy & provides business cases for change</i>

Ensure suspensions and exclusions are used appropriately and administered according to statutory requirements including the use of appeals processes	Delegated	Delegated	A CEdO	R ND <i>PEX approval SDG Administration of PEX/IRPs</i>	R <i>Panels, monitoring policy implementation</i>	A <i>Within academy</i>
Ensure strong parental engagement and regular communication with varied opportunities to increase parental involvement in their child's education	Delegated	Delegated	Delegated	R ND <i>Monitoring & advice</i>	A <i>2 parents on AC</i>	A <i>Within academy, 2 parents on AC</i>
Set term dates, length of the academy day (taking into account 1265 rules) and ensure all-year-round operating arrangements	Delegated	Delegated	Delegated CEdO	A ND <i>Term date & 1265 approval</i>		A <i>Term date & 1265 approval from ND</i>
Set the strategy for Pupil Premium, ensuring value for money and positive impact on the outcomes of PP students	Delegated	Delegated	A CEdO <i>Strategy CFO Financial impact review</i>	A SD <i>Trust strategy and impact ND Sector</i>	I <i>Approval of academy PP plan, publication on website, monitoring</i>	A <i>Spend and publication according to statutory guidance</i>
Delivering services for Looked After Children	Delegated	Delegated	A CEdO	I ND	I <i>Monitoring</i>	A <i>Within academy</i>

Workforce

	Trustees	CEO	ELT	SLT	AC/IEB	Head
Create a positive culture across the trust for all people, ensuring compliance with equalities legislation	A	R	R CPO	R All	I <i>Monitoring</i>	A <i>Within academy</i>
Creation and approval of new and revised job descriptions and posts, ensuring appropriately evaluated salary/grade	Delegated	A <i>Trust positions & Headteachers</i>	A CPO	R HR Leads		R <i>Adhering to trust procedures & policy</i>
Authorisation to agree/vary employment Terms & Conditions including hours and working weeks	Delegated	A <i>Trust positions & Headteachers</i>	A CPO <i>Set procedures & policies</i>	R HR Leads <i>Approval school based</i>		A <i>Adhering to trust procedures & policy</i>
Recruitment and appointment of staff, and signing of employment contracts	A <i>CEO & Chief Officers</i>	A <i>Trust positions &</i>	A CPO <i>Signing school</i>	A HR Leads <i>Adherence to</i>	R <i>Support Headteacher</i>	A <i>Academy staff, adherence to</i>

		<i>Headteachers</i>	<i>contracts</i>	<i>policy</i>	<i>recruitment</i>	<i>trust procedures. & policy</i>
Annual approval of employment policies, including the pay policy and annual pay progression/cost of living increases and appeals process,	A	R <i>Recommends to P&C Committee – Central staff and Headteachers</i>	R CPO <i>Production of policies and reporting to Trust Board</i> ELT <i>Approval of Headteacher recommend</i>	R DHR <i>Advice to schools</i>		I <i>Recommending pay increases above usual progression to C-Suite</i>
Determination of pay ranges - including executive pay, appointments outside range in the salary structure, awarding of allowances in accordance with the STPCD and the value of other discretionary allowances	A <i>CEO, Chief Officers</i>	A <i>Trust positions & Headteachers</i>	A CPO R ELT <i>Approval of pay ranges</i>	R HR Leads <i>Advice to schools</i>		A <i>Adhering to trust procedures & policy</i>
Ensure appropriate performance management policy and procedures are in place for all staff, including use of Agile Appraisal	Delegated R <i>Appraisal of CEO & Chief Officers</i>	Delegated R <i>Chief Officers, ND, SD</i>	A CPO <i>Policy & procedures</i> ELT Line Managers	R SLT Line Managers	R <i>Chair – performance management of Headteacher</i>	A <i>For all staff within academy</i>
Approval of formal restructure plans	Delegated	A <i>Trust & school level approval</i>	R ELT <i>Recommend trust level, approval school level</i>	R Leaders <i>Support schools & recommend to CSuite</i>	C <i>Share views with Headteacher, may feedback to Trust Board</i>	R <i>Produce business case, follow policy & procedures</i>
Following a misconduct panel, authority to issue warnings or other disciplinary measures except dismissal	Delegated	A <i>Trust level & Headteachers approval</i>	A CPO <i>Advice to schools, approval SLT</i>	R DHR <i>Advice to schools, approval school staff</i>		A <i>Follow policy & procedures & approval academy</i>
Following a misconduct panel, authority to issue dismissal and appeals for gross misconduct and misconduct	Delegated R <i>CEO & Chief Officers approval</i>	A <i>Trust level & Headteachers approval</i>	A CPO <i>Approval other school-based staff</i>	R DHR <i>Advice to schools</i>		A <i>Follow policy & procedures & recommend academy</i>

Maintenance of records and data entry into central HR software	Delegated	Delegated	A CPO	R HR Leads		I <i>Academy level</i>
SET Apprenticeship Academy management including financial oversight, QA and reporting to ESFA as required	Delegated	Delegated	A CEdO <i>Programme management</i> CFO <i>Financial oversight</i>	R SD		
SET NPQ/ECF Programme management including partnership contract with Ambition Institute, application approval, financial oversight, QA and reporting	Delegated	Delegated	A CEdO <i>Programme management</i> CFO <i>Financial oversight</i>	R SD/D <i>Programme management & support financial oversight</i>		

Finance

	Trustees	CEO	ELT	SLT	AC/IEB	Head
Set the funding mechanism for central services through top-slice, allocate resources appropriately across the centre and approve/remove financial delegations across schools	Delegated	A	R CFO			
Ensure the Trust has a robust cash position, contingent revenue reserves (5% secondaries, 8% primary and special schools) and invests wisely	Delegated	Delegated	A CFO	R DoF		R <i>Academy reserves</i>
Charging and remissions policy in place and implemented appropriately	Delegated	Delegated	A CFO	R Finance Team		R <i>Within academy</i>
Authority to open a bank account and approve signatories	A <i>Approval</i>	R	R CFO			
Providing DfE/ESFA with accurate and compliant financial data and obtaining ESFA approval as required including for borrowing (leases, overdrafts and credit cards)	Delegated <i>Approval</i>	Delegated <i>Approval</i>	A CFO			
Manage financial risks, including contingency and business continuity planning and maintenance of the finance element of the SET risk register, co-operating with audit/risk and acting on recommendations	Delegated	Delegated	A CFO	R DoF		R <i>Within academy</i>
Ensure robust financial management and planning through a Trust Board approved	Delegated	Delegated	A	R		A

3-year budget, monitoring financial plans and ensuring rigour/scrutiny in budget management, preparation of monthly management accounts, approval of academy budgets			CFO	DoF		<i>Follow SET policies & procedures, maintain balanced budget</i>
Prepare annual audited accounts and maintain accounts in accordance with the Charity Commission's Statement of Recommended Practice (SORP) and ESFA's Academy Trust Handbook, ESFA's accounts direction	A <i>Approval and signature</i>	A <i>Accounting Officer signature</i>	A CFO	R DoF		
Ensure appropriate internal scrutiny/audit preparation of annual accounts and check financial and non-financial controls and risks	Delegated	Delegated	A CFO	R DoF		A <i>Financial control within academy</i>
Ensure spending decisions represent value for money and that public funds have been used as intended by Parliament including ensuring a competitive tendering policy is in place and applied and appropriate levels of approval set	A <i>Approval limit >£100,000</i>	AR <i>Accounting Officer Approval limit <£99,999</i>	AR CFO/CIDO (SCA) <i>Approval limit <£40,000</i>		R <i>Approval limit <£20,000</i>	AR <i>Approval limit <£10,000</i> <i>Ensure policy & procedures followed within academy</i>
Ensure all related party transactions are declared and implemented according to SET Policy and ESFA regulations and a register is kept up-to-date (ESFA must be informed of transactions >£40k and transactions above £2500 must be at cost)	Delegated	A <i>Accounting Officer</i>	AR CFO			A <i>Within academy</i>
Ensuring all ordering and supplier payments are processed according to SET policy, including new vendors approval, all purchases being allocated a Purchase Order for appropriate approval prior to placing an order etc	Delegated	Delegated	AR CFO	R DoF		A <i>Within academy</i>
Authority to process purchase card applications and to set credit card limits (CFO only), ensuring monthly reconciliation with the statement and that all purchases are supported by a receipt/invoice	Delegated	A <i>Approval</i>	AR CFO			R <i>Monthly reconciliation only within academy</i>
Sign-off of monthly payroll process and BACS	Delegated	Delegated	AR CFO			AR <i>Within academy</i>
Ensure expenses are claimed in line with SET Policy, including line manager approval prior to claim being submitted	Delegated R <i>For CEO</i>	Delegated R <i>For Chief Officers</i>	A CFO R ELT	R Line Managers		A <i>Within academy</i>
Ensure Petty Cash expenditure has corresponding receipts and is on the Finance System. A monthly reconciliation of cash in hand against Petty Cash transactions	Delegated	Delegated	A CFO	R		A <i>Within academy</i>

must be carried out and verified by an independent person and are limited to £20.						
Seek approval from the ESFA as required and disclose information in accordance with the Academy Trust Handbook	A	R	R CFO			
Approval of use of Pension Policy Discretions and handling of all pension matters (teachers and support staff)	Delegated	Delegated	A/R CFO/CPO			
Annual Risk Review and premium renewal to ensure that there are appropriate levels of building insurance and public liability insurance in place	Delegated	Delegated	A/R CFO/CIDO			
Acquisition of assets (except land and buildings) maintenance of Asset Register, security and loan of Assets	A <i>Approval</i>	R	R CFO/CIDO			
Acquisition and disposal of assets, including land, buildings and heritage	A <i>Approval</i>	R	R CFO/CIDO			
Management of capital projects	Delegated	Delegated	A CIDO	R DoE		I <i>For projects not managed by SET</i>
Infrastructure & Digital						
	Trustees	CEO	ELT	SLT	AC/IEB	Head
Approval, oversight, production and management of a SET Risk Register	Delegated <i>Review</i>	A <i>Approval</i>	A CFO R ELT	R SLT	R <i>Academy RR only</i>	R <i>Academy RR only</i>
Ensure provision of free school meals to those meeting the criteria and ensure all meals are provided to appropriate nutritional standards	Delegated	Delegated	A/R CIDO			R <i>Within academy</i>
Developing academy buildings and facilities estate long term strategy, maintaining buildings, including developing properly funded maintenance plan	Delegated	Delegated	A CIDO	R DoE		A <i>Academy maintenance, following SET policy</i>
Ensuring appropriate Health and Safety Policies are in place and implemented as expected including RIDDOR and accident reporting as required, statutory training undertaken and Risk Assessments (including Fire Risk Assessments) in place and monitored for effectiveness	Delegated	Delegated	A CIDO	R DoE		A <i>Within academy, following SET policy</i>
Ensuring appropriate Business Continuity Plan and Incident Recovery Plans are in place and implemented as expected	Delegated	Delegated	A CIDO			A <i>Within academy</i>
Statutory compliance testing and assessments are in place including fire safety,	Delegated	Delegated	A	R		A <i>Within academy,</i>

asbestos assessment, water hygiene (including legionella) etc			CIDO	DoE		<i>following SET policy</i>
Maintenance of network infrastructure, ensuring high quality broadband (Wi-Fi) provision and effective filtering and firewalls systems	Delegated	Delegated	A CIDO	R RDS		R <i>Following SET policy</i>
Procurement and maintenance of all IT/communication systems and photocopiers across the trust	Delegated	Delegated	A CIDO	R RDS		R <i>Following SET policy</i>
Ensuring effective controls are in place for data security, privacy, information and cyber security (including encryption, data audit and mapping and back ups) and that these controls are monitored for effectiveness	Delegated	Delegated	A CIDO	R DDS/DPO		R <i>Following SET policy</i>
Ensuring pupil, staff and visitor consent to use of data as required, and management of Freedom of Information requests, Subject Access Requests, data breach investigations/reporting to ICO within the timeframes set	Delegated	Delegated	A CIDO	R DPO		A <i>Following SET policy</i>
Data Policy Management, Data Processing Impact Assessments, document retention/data compliance, monitoring and evaluating status, ensuring all data is disposed of appropriately	Delegated	Delegated	A CIDO	R DPO		R <i>Following SET policy</i>
Communications Strategy, including high quality press releases to national or local press, marketing including advertising, prospectus, internal communications, social media	Delegated	A	R ELT			A/R <i>Within academy, SET approval of all press releases</i>
Trust and academy branding including signage; letterheads; websites; business cards; banners; publications; letters; colours; logos; merchandise	Delegated	A	R ELT <i>For own depts</i>			A <i>For academy, use of SET branding guidelines</i>