

Joining Mercia Primary Academy Trust.

Everyone is valued and takes responsibility for the challenging learning that takes place.



Contents

Foreword	pg. 3
Our aims	pg. 4
Key Performance Indicators	pg. 5
Schools in the Trust	pg. 6
Attainment	pg. 6
Why join MPAT	pg. 6
Strategic School Development	pg. 7
Leadership and Governance	pg. 8
MPAT Corporate Governance diagram	pg. 9
Costs of joining the Trust	pg.10
What the school will receive	pg.10
What will/may change for your school	pg.11
Outcome improvement model	appendix (i)
Due Diligence	appendix (ii)
Extracts from Scheme of Delegation	appendix (iii)

Foreword

Everyone is valued and takes responsibility for the challenging learning that takes place.

Welcome. Thank you for taking the time to read more about joining Mercia Primary Academy Trust. We hope that this document, as well as discussions with us, help support your important decision. We recognise that it is the most important decision that Governing Bodies make.

This is an exciting time for the Trust. All three schools in the Trust, Flax Hill, Lakside and Larkhall, received very good Ofsted reports during the academic year 2021-2022. This shows that our model of school-to-school improvement works effectively. Equally, all schools in the Trust have rising numbers on roll and are well regarded in their local communities.

The Directors of the trust are committed to trust growth over the next 10-year period and strongly believe that by using a collaborative approach, with Governing Bodies running their schools, is the best way to improve outcomes for all children in the trust and local partner schools.

We believe in the important role that a Head Teacher plays in improving outcomes and not in replacing these roles with Heads of Schools. The Trust accepts there is not a 'one size fits all' approach in this area but ultimately we believe that good Head Teachers, with the support of their Governing bodies, will produce good outcomes for children.

Mercia Primary Academy Trust (MPAT) Board of Trustees is determined to be a high performing Multi Academy Trust that delivers the very best educational experience for students aged 3-11. The overarching aim for the Trust is to create academies that provide an environment which is welcoming, caring, calm and purposeful and to stretch our young people academically, support them pastorally and help them develop socially. We also strongly value working with other Trusts and Local Authority schools to ensure strong outcomes for all pupils.

We see collaboration as the key to building a strong and confident Trust. Our structures and processes will continue to evolve to support our academies and develop MPAT to benefit all our students and staff. We are realistic about what can be achieved in the current financial climate but what we do, we intend to do well.

We have a cost effective organisation and a business model that delivers efficiency so that all our students benefit from enhanced resources enabled by economies of scale.

We believe in allowing each school to retain its own distinct identity, firmly rooted in its local community and supported by efficient and effective central services and expertise. All our academies are focused on school improvement, sharing best practice and developing deep partnerships that will embed consistent levels of student outcomes and ensure positive progress.

We believe passionately that education, at every stage of the student journey should develop and nurture the whole person.

R Lane
Chief Executive Officer
Mercia Primary Academy Trust

Aims and vision

Our Vision:

- Belief in the transformational power of education
- Service to our community
- Partnership and professional generosity
- Honesty and openness
- Unflinching commitment to ensure that all children reach their full potential

Our Aims:

- A rich and exciting curriculum enabling our pupils thrive and develop character
- Strong progress in outcomes especially for disadvantaged children and young people
- Excellence in professional learning and development
- Strong and strategic leadership at all levels
- High quality and cost-effective central services

Our Culture:

- High trust - high accountability
- Significant delegated authority to each Headteacher and Governing Body
- Our schools maintain their own character and distinctiveness
- We prioritise quality recruitment and retention
- We grow our own leaders
- We empower people - suggestions welcomed, not afraid to fail
- Passion – we strive for all children to do well and achieve their very best
- Extremely high autonomy
- Makes clear what is not negotiable.
- An extremely open scheme of delegation
- School autonomy over curriculum
- Always ask for advice if needed - support always available

Key Performance Indicators

Indicator	Evidence	Met	Reason if not
All our schools will be good or better at their first Ofsted inspection following conversion.	Flax Hill Nov 2021- Good Lark Hall Dec 2021 -Good Lakeside June 2022-Good	Yes	
Attainment and/or progress will be at least in line with national figures	All externally verified Key Stage Two data for all schools above national average. Reading +10% Spelling, punctuation and grammar +7% Mathematics +9%	Yes	
Attendance will be at least in line with national figures	95% Across all schools 2021-2022	No	Covid
All schools will be led by a Headteacher and supported by staffing structures that are equitable across the Trust	Flax Hill Yes Lark Hall Yes Lakeside Yes	Yes	
There are opportunities for key staff to work across all Trust schools to support school improvement.	Office staff work across all three schools Early years support (2021-2022) including Local Authority school. Teachers move across Trust	Yes	
All schools are well supported by strong governance at school and Trust Board level	Governing bodies praised by Ofsted 2021-2022 School resource management advice (SMRA) actions fully complied with and Education funding and standards agency (EFSA) verified	Yes	
All schools in the Trust have healthy reserves and run balanced budgets	Budget statements	Yes/ No	Budgets currently balance however we do expect unfunded additional charges – e.g. fuel costs, teachers' pay award etc.

Schools in the Trust

School Name	Age range	Number or roll (Reception - Year 6)	Number in preschool (In addition to Number on Roll)	Free School Meals % (not ever 6)	Ofsted grading
Flax Hill	3-7	310	NA	25	Good 2021
Lakeside	3-11	220	30	24	Good 2022
Lark Hall	7-11	90	50	29	Good 2021

Trust pupil size 700

Data for Trust 2022 (average for all children in the Trust)

Subject	Trust Cohort 2022	National 2022	Difference
Reading	84%	74%	+10%
Spelling, punctuation and grammar.	79%	72%	+7%
Maths	80%	71%	+9%

Why join MPAT?

Local authorities have a diminishing role in the services they provide. The latest White paper suggests that by 2030, the government plans for all children to benefit from receiving their education within a strong MAT or to be in the process of joining a MAT. MPAT has a proven record of improving outcomes for children, in not only academic performance but also the wider curriculum and pastoral care.

As a Governing Body, you will retain autonomy. Our scheme of delegation makes clear the powers that still sit at Head Teacher and Governing Body level.

We have a great deal of experience of rapid school improvement and then ensuring consistency in a changing landscape. The CEO took a school from a Local Authority designation of 'special measures' to a 'good and rapidly improving' Ofsted in 18 months. The Head Teacher of Lakeside was part of the SLT that took a school from 'special measures' to a 'good' Ofsted in two years. We appreciate that change does not happen quickly. Concentrating on a few things that matter is far more effective than trying to solve all problems immediately.

We allow Head Teachers to concentrate on the issues that directly impact on children's outcomes. Our central team takes charge of the issues that do not directly influence outcomes but have a vital role in the running of an effective school.

We always provide feedback that is honest, succinct and transparent.

Strategic School Development

The core offer is built around the individual needs of Mercia Primary Academy Trust academies by:

- Enabling and supporting leaders and all other academy staff to work together to raise standards of achievement and attainment
- Ensuring that Mercia Primary Academy Trust schools achieve good value for money
- Building capacity across all aspects of education, business, and operational activity
- Ensuring we minimise bureaucracy to allow an unrelenting focus on achieving the best for our learners.
- Recruiting and retaining excellent staff by ensuring that there are career opportunities within the Trust and effective and comprehensive continued professional development

We achieve this by deploying a central team of practitioners who work with every academy to develop and confidently share consistent best practice, providing quality-assured and value-for-money central services.

Education support and improvement services

Mercia Primary Academy Trust gives flexible and active support for raising standards in:

- Teaching & learning
- Leadership development (at all levels, including leadership quality assurance)
- Office and finance
- Caretaking and site supervision
- Health and safety

By providing:

- Effective learning support and Special Educational Needs services
- Effective behaviour support
- Robust and compliant safeguarding support
- Effective and responsive ICT services to enhance learning
- Caretaking and site supervision management team (currently being developed)
- A core school improvement team
- Finance and other central services including policy compliance, payroll and personnel services

Leadership and Governance

Essential features of Governance

Mercia Primary Academy Trust has an expectation that governance at all levels will be:

- Outward facing
- Encouraging of equality and diversity
- Consistent in leadership
- Collaborative in approaches to decision-making and sharing practice
- Proactive in its approach to strategic leadership in an ever-changing educational landscape

Overall Level of Education Delegation

The Trust believes that the best results will be achieved when each academy's Governing Body receives a level of responsibility and autonomy appropriate to its specific circumstances.

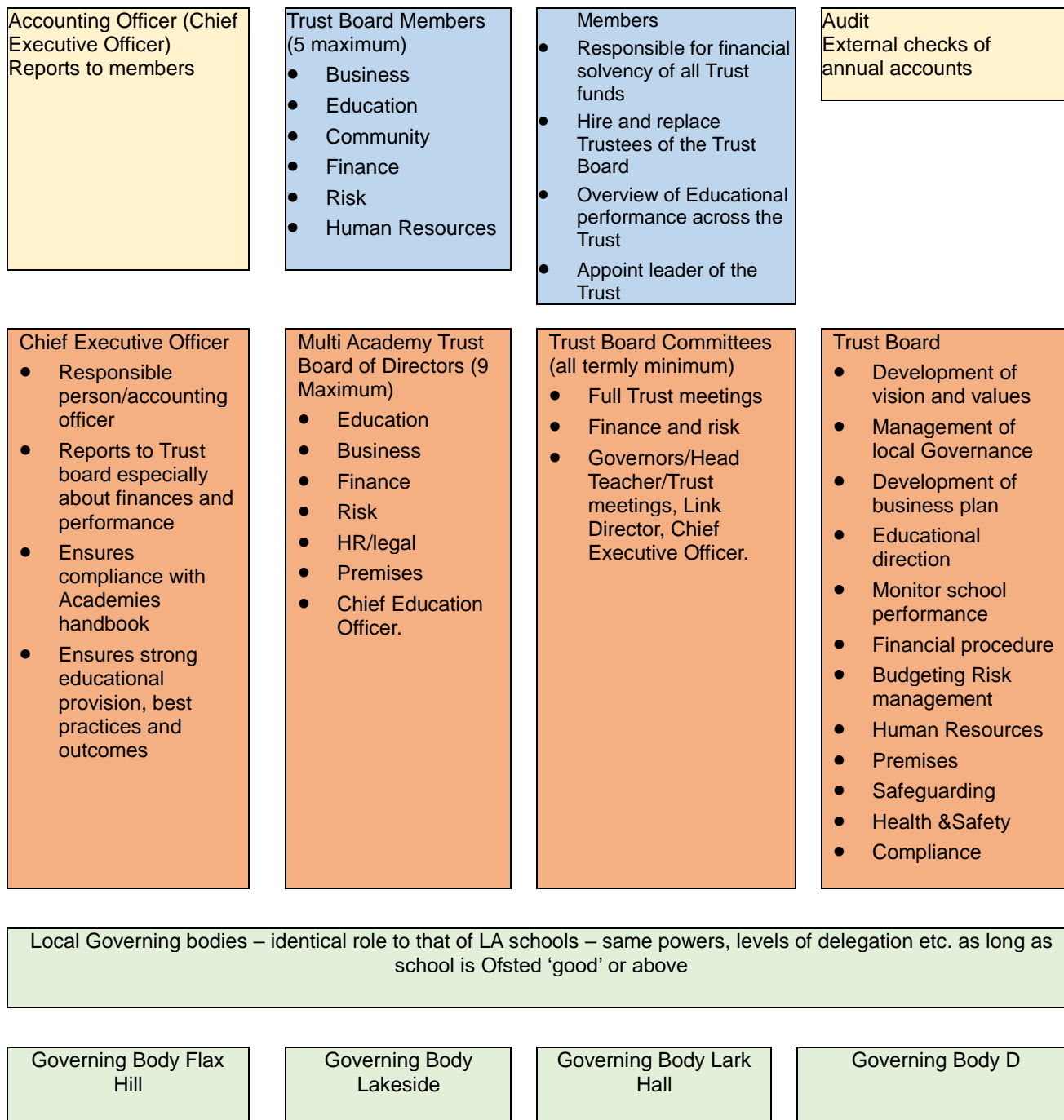
Where the academy is in an Ofsted category or judged by our own review processes to require improvement in some areas, there will be close supervision of the academy by Mercia Primary Academy Trust through its Officers and central team.

Where an academy is judged to be Good or Outstanding, minimal day-to-day supervision by Mercia Primary Academy Trust is needed and the School's Governing Body will operate with maximum autonomy. This matches the policy decision making of a Local Authority school.

Termly Meetings - Chair of Governor, Head Teacher, Link Director and CEO.

Each school in the Trust has a link Director who visits their school on a regular basis. The Trust also holds termly meetings with each school's Chair of Governors, Head Teacher, and Link Director. These allow for the cascading of Trust information and provides a respected space for school issues to be discussed. These are then taken to full board meetings.

MPAT Corporate Governance



Costs of joining the Trust

The DFE provide a grant to join an academy Trust and all initial costs will be covered by this. These costs include Legal fees, Solicitor fees and Pension Actuarial Valuation fees.

After this point, there will be a yearly cost of 5% that goes towards running the central team along with the additional costs of running a Trust. These include audits, pension, payroll, cost of systems and high-level accountancy.

If the school moves into a category this will rise to 7% for 'requires improvement' schools and 9% or above for 'special measures' to support the additional costs this will entail.

This charge is only taken from the General allocated grant (GAG) and not additional revenue streams for e.g. Catch up premium.

Value for money is paramount when spending public money so we work closely with our auditors to ensure that this is achieved. The financial position of the Trust is strong with a healthy surplus of reserves available which ensure that there is adequate cash flow to support schools within the Trust.

What schools will receive

- Ongoing training for all staff on using systems needed to be part of the Trust
- Training for all new staff
- Headteacher Performance Management
- Link Director
- Termly 'Trust' meetings -Head Teacher, Chair of Governors, Link Director
- Headteacher meetings
- All higher-level functions undertaken as needed – e.g. Website, cyber security, adverts placed.
- Monthly finance reports
- Yearly audits of finance and bi-yearly audits of financial systems
- Potential for sharing staff – new experiences reduce staff turnover.
- Good leadership at all levels – Chief Executive Officer has achieved 6 'good' Ofsted's as a Headteacher
- Less bureaucracy due to functions such as Human Resources, finance, estates and health and safety being provided centrally.
- Accountability is shared – intrinsic need to support each other
- Economies of scale
- Continued professional development – shared across the Trust
- Financial planning and budgeting support
- Buildings and site development and improvement
- Human Resources support

What will/may change for your school (red would change)

What would change	Details (who the Trust uses)	Additional notes
School management system	Arbor	This would mean a change from your Management information System (MIS) – e.g. SIMS. Training will be provided
Finance system	HCSS	Controlled centrally
Payroll	Stoke On Trent Council	Many people transferred from Staffordshire County Council to work here
Staff Absence Insurance		We can provide economies of scale here on a yearly basis
Cashless schools	The Trust uses Parent Pay	It is difficult for academies to use cash so cash free is highly preferable.
Free School Meals checker	Staffordshire Prime	You may choose who you want
Property compliance	Entrust	You may choose who you want
Occupational Health	Staffordshire County Council	We would strongly advise using this service
Human Resources	The Trust uses Insight	We would recommend Insight but any Human Resource advisor that follows Staffordshire County Council policies would be fine.
Admissions ranking from the Local Authority	Staffordshire County Council	We would strongly advise using this service
Grounds maintenance	Bloomin Gardens	You may choose who you want
Website	RHP solutions	The school may keep its own website until the contract is up – the school will need a presence on the Trust's web site.
Health and Safety	Elite	The school is welcome to use whoever they want – however we do have economies of scale with our Elite contract

IT support	Staffs Tech	Due to the increase in cyber-attacks the Directors take protection in this area extremely seriously. Whoever the trust uses for ICT support will need to be the same.
Cleaning	Entrust	
RPA Insurance		Government backed insurance for academies
Catering	Entrust	We will be leaving this contract at the end of this academic year
Broadband	Virgin	For schools with a link to the infrastructure we would highly recommend this
Governance clerking	Entrust	We have just left this contract and we are trying another provider at two of the schools in the Trust
Moderation	Entrust	We are exploring other options here
Email	Gmail	Due to cyber security risks, we are moving towards Gmail for all email accounts

Appendix (ii)

Due Diligence

As part of the pre joining process, we conduct a range of due diligence activities with you in order to gain a full picture of your school. This process is as much about us finding out how we can work effectively with you as you finding out how you can work effectively with us.

Due Diligence checklist

Context	
1	Size of school
2	PAN
3	Forecasting of pupil numbers
4	Number of classes/Size of classes
5	Workforce ratios
6	OFSTED (date / category and current evaluation category overall)
7	Curriculum Map (annual / rolling plans, curriculum coverage)
8	Curriculum intent, implementation impact statement (curriculum guidance/policy)
9	School Improvement Plan
10	National Data (EYFS, phonics, KS1, KS2)
HR	
1	Staff contracts, including any existing TUPE requirements and special conditions/clauses relating to that particular school/academy
2	Staff list showing roles - all staff Populate form in folder
3	Pay policy – does it match Staffordshire or Governmental
4	Performance Management policy, system and process - all staff
5	Job descriptions for all roles not following Staffordshire
6	Details of any ongoing staff disciplinary cases if any (formal)
7	Single Central Record
8	Staff absence reports/statistics
9	SENDCO provision
Finance	
1	Finance accounting software
2	Scheme of delegation
3	Internal financial regulations
4	Pupil premium allocations with spend plans
5	Sports premium allocations and statements/reports
6	Management accounts - current plus last 2 years
7	School Census, autumn, spring and summer for current and previous academic year
8	Current year budget plan
9	Three year budget modeller - minimum 3 years forward from current financial year
10	Financial accounts for year ended 31st March 2020 and 2021 or 31 August 2020 and 31 August 2021 as appropriate – LA schools please provide end of year reports including details of reserves
11	Insurance arrangement
12	Details of any equipment lease contracts
13	Financial analysis (business plan/accounts) of any significant trading activities undertaken e.g. in house catering, preschool, wraparound facilities
14	EYFS funding arrangements
15	Nursery pupils- age profile and full part/time split
16	Cashless payment systems if any (for example Parent Pay)
17	Current MIS licences held

18	List of current contracts (please see the list and add any additional contracts),
19	Details of any fraud or financial irregularity (current year plus 7 years)
20	Details of outstanding corporation, VAT and payroll taxes due at the most recent balance sheet date/year end
21	Any correspondence received from HMRC over the last six years
22	Details of any tax investigations over the last six years
23	Copies of all VAT returns for the past 7 years
24	Results of any HMRC inspections
IT	
1	Internet Capacity assessment (speed, supplier, annual cost, contract term, termination date)
2	IT Inventory (to include asset owner, make, model, serial number, purchase date, purchase price, operating system)
3	IT Software (to include one off purchases, cloud / internet services / Mobile Applications - iPads)
4	ICT inventory
5	IT support and maintenance arrangements (SLA, contract term)
6	Firewall, Internet access and filtering arrangements (who manages this?) - to include the solution in place
7	IT acceptable use policy-pupils and staff (to include a copy of current AUP & evidence of signatures / compliance)
8	Backup & Disaster Recovery plan & date of last test (to include scheduled dates of historical testing & results)
9	Wireless Network information
10	E-Safety Policy & date of last review
11	Cloud storage solutions utilised (e.g. Office 365 / Google Docs)
12	Antivirus details including renewal date
13	Any known issues (infrastructure or systems wide)
14	Website hosting / service in place
15	Location of MIS Database (on site / off site) - if off site, where is this stored
16	Phone system (number of devices, number of incoming lines, VOIP / ISDN solution) & management of this
PREMISES / HEALTH & SAFETY	
1	Most recent building condition survey and report, including any potential projected costs Anything to note re buildings
2	Fixed asset register / inventory
3	Asbestos register
4	Current DEC and advisory report (Display Energy Certificate)
5	Date of fixed electrical test survey
6	Date of most recent PAT report
7	Heating infrastructure overview and 3 years' service records/maintenance history
8	HVAC (Heating, Ventilation and Air Conditioning) service records/maintenance history
9	Cleaning arrangements including contract details
10	Overview of kitchen equipment (appliances)- 3 years' service records/maintenance history
11	Inspection records for play and sports equipment
12	CCTV system details
13	Fire alarm and emergency lighting system details, 1 year's maintenance history
14	Details of fire alarm monitoring arrangements
15	List of PFFE (Portable Fire Fighting Equipment) and 1 year's maintenance history
16	Intruder alarm system overview, 1 year's maintenance history
17	List of accessibility equipment and inspection records (hoists etc.)
18	H&S Self Audit date, outcomes and associated action plans
19	Accident reports, including 'near miss' reports in the last 2 years
20	Potential liability claims

Governance	
1	Governing Body minutes- full for current and previous 2 years
2	GB clerking arrangements
3	All current policies - statutory and other
4	Finance Committee Meeting minutes
Data Protection	
1	Freedom of Information requests, including responses
2	Number of Subject Access Requests in the current and last academic year
3	Number of Data breaches in the current and last academic year – are there any contentious data breaches
4	Data breach policy/procedure
5	Copy of record retention schedule
Legal	
6	Details of any significant issues where legal advice has been sought
7	Claims history and any current claims

Appendix (iii)

Scheme of delegation

For Academies, this is a legally binding document and effectively shows how much control you as Governors will have of your school. The lower the delegated budget to Headteachers the less say you have in the running of your school.

RACI MODEL R - Responsible A - Accountable C - Consulted I - Informed

Area	Description	Delegation					Business Manager
		Members	Directors/ Trustees	Governing Bodies & Committees	CEO	HT	
Governing Framework Individual Director/ Trust							
<p>1 – Strategic:</p> <p>Strategic Leadership is the core function. Responsibility for setting the Trust’s culture, values and ethos.</p> <p>Setting the Trust’s vision and connecting to the community that they serve</p>	Setting direction with clear vision – written statement.	I	A	R	R	R	
	Determine - Trust policies which reflect ethos, values, including admissions, expenses, Data Protection, British Values, and FOI. SEN safeguarding, Child Protection and Curriculum: approve	I	A&R	C	C	C	
	Determine - Trust staffing policies which reflect the Trust ethos and values including appraisal, capability, discipline, conduct, Pay policy and grievance.	I	A&R	C	C	C	
	Determine - Trust policies for complaints, health and safety, accessibility plan, premises management and FOI		A		R	R	R
	Determine – Full oversight of risk register – identify, manage and record risks		A&R		R		R
	Determine a behaviour policy and distribute for all stakeholders.		A	R	R	R	
	Annually determine admissions arrangements and to carry out consultation where changes are proposed		A	R	R	R	

2 - Accountability: Creating robust accountability for executive leaders for educational performance and for financial organisational performance.	Oversee the appointment or line management of a single executive leader (CEO) as head of line management, ensuring they implement the strategic framework established by the board and holding them to account for the day to day running.	I	A&R			
	Appointment of other SLT/line managers within the Trust.		A	R	R	R
	To hold the CEO to account for his personal performance management, and the performance management of the Trust - Performance management of CEO.	I	A&R			
	The Headteachers are responsible for working proactively and to establish effective cycle of reporting to the relevant Governing Body.		I	A		R
	The Governing Body are responsible for working proactively to establish effective reporting to the board of Directors – establish key priorities and review key documents such as annual accounts		I	A	R	
	Workload consideration – processes to be monitored and streamlined to ensure workload is proportionate and sustainable for teachers and leaders.		A	R	R	R
	Required Meetings per year – minimum expectation (only when quorate).	3	3	3		
	Maintain oversight of curricular performance via progress updates – Disadvantaged, gender, SEN, ethnicity, exclusions, explore analysis of all data sets – ASP		I	R	A	R
Determine arrangements for any catch-up premium spending decisions, and impact of expenditure overall.		A	R	R	R	

	Ensure pupils are safe from extremism, radicalisation through the implementation of Prevent	I	A	R	R	R	
	Maintain oversight of all matters relating to attendance, behaviour, accident reporting, safeguarding, complaints and performance		A	R	R	R	
	Undertake school visits with particular focus in mind – gather information from pupils, parents and staff.		I	R	A		
	Oversee financial performance, ensuring public funds are correctly utilised – consideration to regularity, probity, value for money (links with SDP, Budgets and outturns) – VMFI – IDAMS, SRMA, procurement – scheme of delegation	I	A		R		
	Monitoring of policies, executive salaries, pay and performance, benchmarking income and expenditure, linking finance and curricular outcomes		A&R	R	R	R	R
3 – People: Appointing people with the right skills, experience, qualities and capacity.	Appoint members with relevant experience: Dictate role descriptions	A&R	I		C		
	Appoint Directors with relevant skills/experience: Dictate role descriptions	I	A&R		C		
	Undertake skills assessment matrix and identify areas of weakness to be addressed by training/recruitment		A&R	R			
	Specify a code of conduct for individuals to adhere to when acting on local committees. Acknowledging the 7 principles of public life.	R	A&R	R			
	Undergo enhanced criminal record checks (plus section 128 for Governors).	R	A&R	R	R	R	

	Oversee the election of parent/staff Governors		I	A&R	R	
	Appoint and remove the Clerk to the Board		A&R	R		
4 – Structures: Strong structures that reinforce clearly defined roles and responsibilities	Appoint/Remove Accounting Officer		A&R			
	Appoint/remove Directors/Trustee	I	A&R		C	
	Appoint/remove Members	A&R			C	
	Confirm the Terms of Reference		A&R	R		
5 – Compliance: Fulfilling our duties to abide with statutory and contractual requirements.	Audit reporting for matters of compliance (i.e.: safeguarding, Health & Safety, Employment and Data)	I	A&R			R
	Review policies relating to Health & safety		A&R	R	R	R
	Review policies relating to equal opportunities		A	R	R	R
	To ensure a balanced and broad curriculum – including RSE, Cultural Education, Maths, English, PE, EYFS, SEN		I	A	R	R
	To appoint a suitably qualified SENCO, LAC co-ordinator to arrange PEPs		I	A&R	R	
	Full range of attainment data to be published on the school website. Annual reporting to parents/carers on their child’s progress and achievements.		I	A	R	
	Appointment of Headteacher or Deputy Head or procedures relating to performance management/capability.			A&R	R	R

	Uphold safer recruitment practices in line with KCSIE, following the statutory guidance of ‘Disqualification under the Childcare Act 2006’.	R	R	R	A	R	R
	Appraisal and performance management of the Headteacher			R	A		
	Understanding and compliance of the AFH and Charity Commissions’ guidance – Articles of association	R	R	R	R	R	
	Establish an Audit & Risk Committee		R				
	Publish on website – Pecuniary Interests, governance, Charging & remissions policy			A	R	R	
	Safeguarding and pupil welfare – ensure effective policies and procedures and nominate a safeguarding lead (DSL). safeguarding, Prevent,			R	A	R	
	Establish policies on behaviour, discipline (and record keeping), and reviewing outcomes.			R	A	R	
	Establish policy on excluding pupils and monitoring data			R	A	R	
	Establish policy on attendance			R	A	R	
	Establish policy on admissions, PAN, children with SEN, LAC and admissions appeals			R	A	R	
	Premises and Buildings – maintenance, DFC funding, School conditions allocations, Policy on lettings, charitable purpose use (ASC/Breakfast Club)			R	A	R	

	Establish policy on Data protection/Data sharing – Privacy notice, Freedom of information, Examinations, GIAS, EFSA, DFE, retention of documents			R	R	R	R
	Establish Complaints procedures			R	A	R	
	Establish whistleblowing policy and chain of command for complaints		A	R	R	R	
6 – Evaluation To monitor and improve the quality and impact of governance	Boards to review their own effectiveness – Chair to seek feedback from other board members			R	A		
	Skills competency to be undertaken annually and any training identified or appointments made to strengthen weaknesses.		R	R	A		
	Full analysis of audited accounts (displayed on website)	R	R	R	A		
	Support OFSTED inspections and monitor ‘Parent View’			R		A	
	Uphold the support and guidance from the NGA			R	A		

Salaries and Wages

F5. The following members of staff, in addition to the CEO, Headteacher and Business Manager are authorised to certify pay documents and time records: -

- Deputy Headteacher
- Senior Operational Office Manager/Bursar

Authorisation Levels (per Academy)

Delegated Duty	Value	Delegated Authority
Purchase Credit Card	£300 limit Monthly limit: £2000 £1500 £1000 £500	Single cash withdrawal CEO Headteacher / Deputy Headteacher Business Manager / Senior Operations Office Manager / Bursar / Office Manager / Administration Assistant Caretaker
Cheque Payments	All amounts	Two signatories
Bank account transfers	Up to £5,000 Over £5,000 to £50,000	Business Manager Headteacher or Business Manager plus 1 delegated signatory.
BACS Payroll payment authorisation	Up to £175,000	Head Teacher or Business Manager and 1 other delegated signatory

	Over £175,000 and up to £300k	As above plus Chair of F & GP or Director.
	Over £300k	If movement to new bank account, full F & GP committee approval
Order / Invoice Approval	Limitless	Head Teacher/CEO
Non Order Invoices	£10,000	Business Manager
	£5000	Senior Operations Office Manager / Bursar
	£2,000	Office Manager
	Limitless	Head Teacher/CEO needs minuting at Gov and Director level before proceeding
Orders, Self-Authorisation	£10,000	Business Manager
	£5000	Senior Operational Office Manager/Bursar
	£2,000	Office Manager *Exceptional circumstances may result in agreeing work undertaken immediately without a purchase order or quotation

Approval	<p>Limitless</p> <p>£10,000</p> <p>£5000</p> <p>£0</p> <p>Over £40,000</p>	<p>Head Teacher</p> <p>Business Manager</p> <p>Senior Operational Office Manager/Bursar</p> <p>Admin Officer</p> <p>In line with quotations and tendering procedures below & involving F & GP & reported to Full Governing Body as appropriate</p>
Quotations & Tendering	<p>Low value - under £10,000</p> <p>Medium value - Over £10,000 up to £40,000</p> <p>£40,000 to OJEU limit</p> <p>Over OJEU limit*</p>	<p>Quotations to be sought *Exceptional circumstances may result in agreeing work undertaken immediately without a purchase order or quotation</p> <p>Three comparative quotations to be sought and formal tendering procedure to be applied Formal tendering process requiring F & GP approval</p> <p>OJEU advertising required, F & GP approval & reported Governing Body approval – Seek advice from Local authority. *Exceptional circumstances may result in agreeing work undertaken immediately without a purchase order or quotation</p>
Authority to accept other than lowest quotation	Any	Head Teacher

Disposal of Assets	Up to £1,000	Head Teacher/Business Manager
	Up to £5,000	F & GP Committee
	Over £5,000	Governing Body
Write-off of Bad Debts	£1.00 - £49.00	Headteacher
	£50.00 over	F & GP Committee reported to Governing Body
Signatories for Grant Claims / DFE returns	Any	Head Teacher and/or Chair of Governors
Income Invoice Approval	Up to £5,000	Business Manager
	Up to £5,000	Senior Operational Office Manager/Bursar
	Up to £10,000	Above plus Head Teacher
	Up to £100,000	Above plus Chair of Governing Body
	Over £100,000	Full Governing Body