



**HUNTINGTON PRIMARY ACADEMY
BOARD OF TRUSTEES DECISION PLANNER RELATING TO FINANCIAL MANAGEMENT**

THIS PLANNER SHOWS TO WHICH LEVEL THE BOARD OF TRUSTEES MAY LEGALLY DELEGATE FUNCTIONS

KEY

Level 1: Full Board of Trustees

Level 2: A committee of the Board of Trustees

Level 3: An individual Trustee

Level 4: Headteacher/Acting Headteacher.

Column blank: Action could be undertaken by this level.

Column blocked off: Function cannot be legally carried out at this level.

Although decisions may be delegated, the Board of Trustees as a whole remains responsible for any decision made under delegation

Key Function	Tasks	Decision Level			
		1	2	3	4
Budgets	To approve the first formal budget plan each financial year				
	To monitor monthly expenditure.				
	To establish a charging and remissions policy				
	Miscellaneous financial decisions				
	To enter into contracts (Board of Trustees may wish to agree financial limits)				
	To make payments				
Staffing	Agree a pay policy				
	Pay discretions				

Curriculum	To establish a charging and remissions policy for activities (non National Curriculum based)				
Premises & Insurance	Buildings insurance and personal liability - Board of Trustees to seek advice from or trustees where appropriate				
	Procuring and maintaining buildings, including developing properly funded maintenance plan				
Board of Trustees Procedures	To set up a Register of Trustees Business Interests				
	To approve and set up a Trustees Expenses Scheme				
	To consider whether or not to exercise delegation of functions to individuals or committees				
	To regulate the Board of Trustees procedures				
Extended Schools*	To decide to offer additional activities and to what form these should take	*			
	To put into place the additional services provided				
	To ensure delivery of services provided				
	To ensure financial viability of, and probity for, services provided				
	To cease providing extended school provision	*			

*Although these tasks are open to delegation under the Education (School Government)(Terms of Reference) (England) Regulations 2000, the expectation would be that these decisions would be undertaken by the full Board of Trustees.