

Brooke Weston Trust

Scheme of Delegation

September 2015

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Scheme of Delegation

Brooke Weston Trust

Summary

The Brooke Weston Trust (BWT) is the legal entity responsible for the governance of all academies and free schools within the Trust. BWT shall have regard to (but for the avoidance of doubt shall not be bound by) any guidance as to the governance of academies that the Secretary of State may publish to the extent permitted by the governing documents.

The object of the Trust is to advance for the public benefit education in the United Kingdom, by establishing, maintaining, managing and developing schools which provide high quality education to students from all backgrounds by offering a broad curriculum and fostering collaboration across the Trust family of schools, other schools and the wider community.

The Trust operates with the following culture, principles and objectives:

- A deep resolve to foster personal achievement, accomplishment and ambition of all its students.
- Determination to make long term contributions to its local communities and to wider society.
- All academies within the Trust are in a partnership of equals.

The Trust has an unswerving commitment to the following values and qualities:

- Honesty, integrity, objectivity, openness, selflessness, accountability, leadership, teamwork, benevolence, respect, confidentiality, equality, high expectations, fairness, substance over appearance.
- Ensuring high levels of accountability and empowerment for the CEO.

Vision Statement of the Trust:

'An excellent education for every child' means giving every child the life chances we want for our own.

The Operating Principles of the Trust:

We are an education service organisation which puts children first so that...

- every student will make the best progress they can
- we provide the best possible breadth of preparation for our students to contribute to society and live fulfilled lives
- we all live our trust in students daily, believe they want to learn and to contribute positively to the school and wider society

We have some non-negotiables which means we are...

- relentless in assessing our performance and seeking improvement in all areas
- unashamed of taking tough decisions and the difficult paths where necessary
- an employer who values the contributions of its employees, empowers them to contribute and offers a rewarding working environment at the leading edge of professional development
- demanding of our employees to join in the mission for excellence and provide exceptional personal and academic development for students
- committed to treating our students with the same rigorous expectation and the same values for producing high quality work that we have for ourselves

We expect the support of our students...

- to live up to the trust we place in them and to understand they are our clients
- to support each other on their challenging but rewarding journey of personal development and achievement

We expect the support of parents and carers...

- to help ensure that students play their part and meet the expectations we place on them
- to play an active partnership role in the education and development of their children

We seek the support of our community...

- to give us space and opportunity to excel
- to let us know when and how we can contribute to local society

We recognise that financial constraints mean we cannot do all we might like, so...

- we seek best value for money in all things, including providing the best learning environment possible
- we look to our suppliers to help in this
- where compromises are needed we will make them in favour of enhancing or protecting the collective outcomes

Principal Sponsors of the Brooke Weston Trust

The Garfield Weston Foundation

Founded with the aim of supporting a broad range of activities in the fields of religion, education, the environment, the arts, health (including research) and other areas of general benefit to the community in the UK, the Garfield Weston Foundation makes generous donations to a wide range of organisations each year. The Foundation may appoint two sponsor directors to the Brooke Weston Trust Board of Directors. These are currently George Weston and Guy Weston.

de Capell Brooke Family

Hugh de Capell Brooke was a founding sponsor of Brooke Weston City Technology College and was a strong supporter of the school over many years. The Brooke Weston Trust now benefits from the strong support of Hugh's son, Alexander de Capell Brooke. Alexander de Capell Brooke may appoint up to two sponsor directors to the Brooke Weston Trust Board of Directors. These are current Alexander de Capell Brooke and Bob Lane.

The Trust's Sponsor Directors fulfil the following key roles:

- Appointment of the CEO and Finance Director.
- Approve appointment of Executive Principals and Principals.
- Approval of Trust strategy.
- Intervention in any matter as necessary.
- Authorisation of major investment, expansion or other material changes.

Board of Directors

The Board of Directors is responsible for the effective operation of the Trust and each academy or free school. It provides ongoing challenge and support to the executive team and to Local Governing Bodies (LGBs). The Board of Directors meets three times per year plus any extraordinary meetings.

The Board fulfils the following key roles through delegation of its powers to the CEO:

- Ensures safety, health and compliance across all Trust schools and activities.
- Ensures members are appropriately informed about Trust performance, including financial performance.
- Ensures that the guiding principles, culture and objectives are applied consistently.

The operation of the Board is set out in the Trust's Articles of Association. The Board currently comprises:

- 2 Directors appointed by the Garfield Weston Foundation
- 2 Directors appointed by the de Capell Brooke family
- 1 Director appointed by Corby Developments Ltd
- Chairman of the Board at the time
- CEO of the Trust at the time
- Chair of the Finance and Audit Committee at the time
- Legal Advisor
- Trust Finance Director (non-director role)
- Independent Education Expert (non-director role) to give impartial challenge

Key responsibilities:

- Ensure the quality of the educational provision at each academy.
- Establish and oversee the strategic direction of each academy and challenge and monitor its performance.
- Employ staff.
- Co-operate with other staff and institutions.
- Ensure compliance with all the relevant legislation, including (but not limited to) that relating to the health and safety of its employees, students and visitors.
- Challenge and monitor the financial governance and strategy of the Trust through the delegation of powers to its Finance and Audit Committee (see appendix 1 for BWT's Scheme of Financial Delegation).
- Ensure regular effective communication with Local Governing Bodies via the Chair and CEO.
- Approve the admissions policies of individual academies or free schools.
- Consider proposals for growth of the Trust or change of strategic direction.

Aspects of these responsibilities may be delegated to the CEO or individual LGBs, with the day-to-day running of each academy delegated to the respective Executive Principal and Academy Principal. For example, the Board will:

- Be informed by the CEO on the appointment of Executive Principals or Principals to individual academies, which are subject to Sponsor Directors' approval.
- Ensure clarity of roles for LGBs and (via the CEO, Executive Principals and Chairs of LGBs) that there is effective governance at individual academy level.
- Ensure the CEO has provided training for LGBs and their Chairs to fulfil their delegated duties as set out in this document.
- Via the Chair of the Board, to undertake performance management of the CEO.
- Ensure clarity of roles and accountability between the Board, the CEO, Executive Principals, Principals, Chairs of LGBs and LGBs.

- Approve the Trust pay and performance policy and devolve operational aspects to the CEO.
- Ensure all finances and senior pay awards are effectively managed by the CEO and Finance Director through the Finance and Audit Committee and Remuneration Committee.

Evidence of the effectiveness of the Board will be provided by:

- Output from the annual self-assessment audit.
- Achievement and attainment at each academy.
- Approving the targets set for each academy.
- Rapid and demonstrable progress for students.
- Reduction in the gap between performance of different groups of students and the average.
- Rigorous, data oriented assessment of teaching quality and student progress.
- High standards of behaviour, good attendance and a safe environment in each academy.
- A strong Trust-wide culture of spiritual, moral, social and cultural development.
- Universally high expectations of staff as well as students.
- Governors acting as a driving force for improvement regularly checking their own effectiveness.
- Positive parent / carer feedback.
- Collection of data indicating academies regarded as an asset within their communities.
- Evidence of decisive action taken to address financial and leadership challenges at individual academy level.

Standing Committees of the Board:

Finance and Audit Committee (meets at least four times per year)

The purpose of the committee is to exercise the powers and duties of the Board of Directors in respect of the financial administration of the Trust, except for those items specifically reserved for the Board of Directors and those delegated to the Chief Executive Officer, the Trust Finance Director and other staff. The committee coordinates the Board's financial responsibilities by recommending policy and strategy to the Board, interpreting it for staff and monitoring its implementation. The committee assists the Board in exercising its fiduciary duties, provides the Board with overview of the Trust's financial audit and ensures proper checks and balances are in place.

Remuneration Committee (meets annually)

The purpose of the committee is to review proposed salary awards and pay scales used by the Trust; to conduct detailed analysis of proposed senior staff (i.e. CEO, FD, Executive Principal, Principal, Vice Principal) pay awards; to scrutinise performance management records.

Chief Executive Officer

The CEO is appointed by the Sponsor Directors in consultation with the Board to fulfil the following delegated objectives.

Objectives:

- Safety, health and compliance.
- Setting and communicating strategy for the chain.
- Ensuring the Board of Directors is appropriately informed through agreed mechanisms.
- Ensuring that the guiding principles, culture and objectives of the Trust are faithfully upheld, revisited and reinforced.

Key responsibilities:

Effective management of budgets

The CEO will be accountable for budgetary planning and delivery and will ensure effective use of resources to achieve value for money through centralisation and sharing where appropriate across the Trust, within sub-groups of academies and at individual academy level. The CEO will be assisted by the Finance Director and Executive Principals in this. The CEO and Finance Director will report regularly to the Finance and Audit Committee as well as the main Trust Board.

Performance and Standards

The CEO will be accountable to the Board for:

- Providing effective performance management of Trust Executive Principals, Principals and the Finance Director.
- Standards in every Trust academy.
- Ensuring robust quality assurance processes are in place at each academy and that LGBs carry out their duties effectively.
- Defining expectations and operating rigorous data-based progress assessment.
- Ensuring tactical capacity for support is in place either using shared or central resources.
- Ensuring robust management reporting is in place at each Academy.
- Preparing and presenting reports to the Board of Directors and Trust.

People

The CEO appoints Executive Principals and Principals on behalf of the Sponsor Directors and has the right of veto to any appointment below the level of Executive Principal and Principal to the Trust with the exception of the Trust Finance Director who is appointed directly by the Sponsor Directors after consultation with the Board. The CEO provides regular updates on performance targets for all Executive Principals and Principals.

CEO is accountable to the Board for:

- Ensuring appropriate numbers, qualification and skills of staff in each academy.
- Ensuring appropriate professional development and talent management is in place.
- Ensuring that pay is appropriately linked to performance.
- Intervening at individual academy level where necessary.
- Appointments processes and procedures, including safeguarding.
- Managing Executive Principals and senior central team staff as direct reports.

Executive Principals

Executive Principals are accountable for a number of academies as determined by the CEO. They are responsible for the leadership and management of their Principals as agreed with the CEO and for all aspects of performance. Executive Principals will ensure their academies meet individual institution development plan targets and contribute effectively to achieving Trust priorities set by the Board. If required they will assume the role of Principal in any Trust academy where a leadership vacancy occurs.

Local Governing Bodies

The Local Governing Bodies (LGB) are committees of the Board. It is the role of the LGB to support and strengthen their Principal's leadership through robust challenge; to work via the Chair with the academy or free school Executive Principal to hold the Principal accountable for the performance of students and staff. Local Governing Bodies meet at least three times per year.

The objectives of LGBs are to be accountable to the CEO and Board for:

- ensuring local processes are in place and are adequate for safety, health and compliance.
- ensuring the Board are informed through agreed mechanisms.
- ensuring that guiding principles, culture and objectives of the Trust are faithfully upheld, revisited and reinforced.
- ensuring with the Principal that the highest standards of student behavior are achieved and sustained.

The composition of LGBs is determined by the Board of Directors, subject to the Articles of Association. The Chair of the Board of Directors, the CEO, and the Finance Director or other member of the central executive team may attend any LGB meeting. The Executive Principal of the Academy is automatically a governor at each academy they oversee and should normally attend LGBs along with the Principal barring exceptional circumstances.

The Chair of the LGB will be appointed by a resolution of the Brooke Weston Trust Board of Directors who will take into account any representations made by the LGB prior to appointment. Each LGB will include elected parent representatives, community representatives and any other co-opted governors, such as staff representatives, as deemed appropriate by the Board of Directors in consultation with the LGB Chair.

Members of any LGB may be invited to attend meetings or sit on an exclusion panel in another Trust academy or free school where their particular skills/experience may be of use; similarly they may be invited to join review/ appeals panels relating to personnel and disciplinary matters including the conduct of staff in any Trust academy.

Key responsibilities:

- Ensuring there is local adaptation/adoption of central policies and functions as directed by the CEO on behalf of the Board of Directors.
- With the Executive Principal to hold the Principal to account for the educational performance and student progress.
- To be accountable for ensuring compliance.
- To be aware of academy performance and challenges through regular visits and good management reporting.
- Understand the academy's strengths and development needs and to agree strategic planning priorities with the Principal subject to approval by the Executive Principal, CEO and Board of Directors.
- Listening to and ensuring effective relationships with students, parents and local primary schools.
- Responsible for supporting the Principal to set/uphold high standards of discipline and conduct for students and staff alike.
- Reflecting and responding to the needs and opportunities within the community.

LGBs will work with their Principal, Executive Principal and the CEO to ensure:

- Staffing capacity and professional development is appropriate.

- Quality assurance is effective and appropriate targets are in place.
- Student progress meets Trust expectations, for different groups and in general.
- Pupil premium expenditure has an effective impact on reducing gaps between groups and the average.
- Student applications, admissions, attendance and exclusions information is regularly reviewed.
- Every school is 'adding value' to each student they educate, following the 'no-one left behind' mantra.
- Staff absence, recruitment, retention is regularly reviewed.

The effectiveness of the work of LGBs will be evidenced by

- Challenging debate at meetings on performance and improvement (i.e. in minutes of meetings).
 - Good parental feedback (through questionnaires and records of other consultation events).
 - Good feedback on the impact of the academy in the community (range of evidence sources).
- Demonstrable checks on their own effectiveness using a Trust-wide effectiveness self-audit tool for LGBs.

Date Adopted:

September 2015

Review Date:

September 2016

Appendix 1: Scheme of Financial Delegation

1. Powers and Duties Reserved for the Board of Directors

General

- 1.1** Approval of a written scheme of delegation of its financial powers and duties to its Finance Committee, the Chief Executive Officer, the Trust Finance Director and other staff. The scheme must satisfy the Board of Directors ultimate responsibility for ensuring that there are adequate operational controls in place for all the financial processes within the Trust. The Scheme of Delegation should be operated in conjunction with the Financial Regulations of the Trust.

Budgets/Budgetary Control

- 1.2** Formally approving the annual Trust budget.
- 1.3** Considering budgetary control reports from the Finance Committee at every meeting, with relevant explanations and documentation where required.
- 1.4** Authorisation of all virements in excess of £250,000 between budget headings. Details of all virements approved and authorised by the Finance Committee are to be formally notified to the Board of Directors.

Purchasing

- 1.5** Maintenance of a Register of Business Interests for all Members, Directors, Governors and Trust staff with financial responsibilities.
- 1.6** Authorisation of the award of tenders above £250,000.

Income

- 1.7** Authorisation of the write off of debts not collectable (the Secretary of State's prior approval is also required if debts to be written off are above the value set out in the annual funding letter).

Security of Assets

- 1.8** Authorisation of the disposal of individual items of equipment and materials that have become surplus to requirements, unusable or obsolete with an original purchase value in excess of £20,000.

Accounts and Audit

- 1.9** Approval of the audited financial statements.
- 1.10** Informing the EFA if it suspects any irregularity affecting resources.

Scheme of Financial Delegation

2. Powers and Duties Reserved for the Finance and Audit Committee

General

- 2.1 Exercising the powers and duties of the Board of Directors in respect of the financial administration of the Trust, except for those items specifically reserved for the Board of Directors and those delegated to the Chief Executive Officer, the Trust Finance Director and other staff.
- 2.2 Reporting on decisions taken under delegated powers to the next meeting of the Board of Directors.

Budgets/Budgetary Control

- 2.3 Reviewing the annual Trust budget and recommending its acceptance, or otherwise to the Board of Directors.
- 2.4 Considering budgetary control reports on the Trusts financial position at every meeting, taking appropriate action to contain expenditure within the budget and report to the Board of Directors.
- 2.5 Reviewing the virement of sums between budget heads, subject to a limit of £75,000, as approved and authorised by the Chief Executive Officer and Trust Finance Director, which are to be formally notified to the Finance Committee who shall minute the notification.
- 2.6 Approving virements between budget headings of up to £250,000.
- 2.7 Reporting to the Board of Directors all significant financial matters and any actual or potential overspending.

Purchasing

- 2.8 Authorising the award of orders and contracts over £75,000 and up to £250,000.

Security of Assets

- 2.9 Authorising the disposal of individual items of equipment and materials that have become surplus to requirements, unusable or obsolete with an original purchase value of up to £20,000 and reporting such authorisations to the Board of Directors.

Accounts and Audit

- 2.10 Appointment of external auditors.
- 2.11 Reviewing the draft financial statements and external audit reports and highlighting any significant issues to the Board of Directors.
- 2.12 Receiving the reports of the auditor on the use of resources, systems of internal financial control, and discharge of financial responsibilities and highlighting any significant issues to the Board of Directors.
- 2.13 Receiving quarterly reports from independent auditors on our internal controls.
- 2.14 Monitoring outcomes of the internal peer reviews that are undertaken on a termly basis.

Scheme of Financial Delegation

3. Powers and Duties Reserved for the Chief Executive Officer

The Chief Executive Officer has delegated powers and functions in respect of internal organisation, management and control of the Trust, the implementation of all policies approved by the Board of Directors and for the direction of teaching and the curriculum.

The Chief Executive Officer shall be responsible for:

Budgets/Budgetary Control

- 3.1 Reviewing income and expenditure reports and highlighting actual or potential overspending to the Finance Committee.
- 3.2 Approving virements between budget headings of up to £75,000 and reporting such approval to the Finance Committee.

Financial Management

- 3.3 Ensuring the arrangements for collection of income, ordering of goods and services, payments and security of assets are in accordance with the Financial Regulations.

Purchasing

- 3.4 Authorising all orders and contracts over £10,000 in conjunction with the Finance Director.
- 3.5 Ensuring that all contracts and agreements conform to the Financial Regulations.

Payroll and Personnel

- 3.6 Approval/veto of proposals and authorisation of changes to the Trust's establishment.

Security of Assets

- 3.7 Ensuring that there are annual independent checks of assets and the asset register.
- 3.8 Ensuring that proper security is maintained at all times for all buildings, furniture, equipment, vehicles, stocks, stores, cash, information and records etc. under his/her control.

Accounts and Audit

- 3.9 The operation of financial processes within the Academy, ensuring that adequate operational controls are in place and that the principles of internal control are maintained.
- 3.10 Ensuring ongoing in-year QA processes are in place via independent scrutiny and internal checks.

Scheme of Financial Delegation

4. Powers and Duties Reserved for the Finance Director

The Finance Director shall be responsible for the strategic financial planning in conjunction with the CEO, Executive Principals and Cluster Business Managers, relating to:

Budgets/Budgetary Control

- 4.1 Preparing an annual draft budget plan for consideration by the Finance Committee and Board of Directors.
- 4.2 Monthly monitoring of expenditure and income against the approved budget and submitting reports on the Trusts financial position to every meeting of the Finance Committee. Any actual or potential overspending shall be reported to the Finance Committee.
- 4.3 Approving virements between budget headings up to a value of £75,000 and reporting such approval to the Finance Committee.

Purchasing

- 4.4 Ensuring that the individual academies are maintaining a register of formal contracts entered into, amounts paid and certificates of completion and are retaining the quotes obtained for goods, works and services. Whilst overall responsibility for this sits with the Finance Director, maintenance of such records can be delegated to Cluster Business Managers.
- 4.5 Ensuring that all correct invoices are duly certified by authorised staff before payments. Routine scrutiny can be delegated to Cluster Business Managers.
- 4.6 Ensuring the appropriate division of duties between staff responsible for processing orders, receiving deliveries and processing payments.

Payroll and Personnel

- 4.7 Authorising the monthly payroll.
- 4.8 With the CEO, jointly authorising any changes to the staff structures in the individual academies.
- 4.9 With the CEO, jointly authorising any posts advertised in any academy.
- 4.10 Authorising any changes in salary to existing staff after consultation with the CEO.

Banking Arrangements

- 4.11 Maintaining proper records of account and reviewing monthly bank reconciliations (this can be delegated to a Cluster Business Manager).

Accounts and Audit

- 4.12 The operation of financial processes within the Trust, ensuring that adequate operational controls are in place and that the principles of internal control are maintained.
- 4.13 Ensuring that full, accurate and up to date records are maintained in order to provide financial and statistical information.
- 4.14 Ensuring that all records and documents are available for audit by the appointed external auditors.

Insurances

4.15 Ensuring that arrangements for insurance cover are in place and adequate.

4.16 Notifying the Finance and Audit Committee on any eventuality that could affect the Trust's insurance arrangements

Scheme of Financial Delegation

5. Powers and Duties Reserved for other staff

Members of staff with delegated responsibilities should be aware that these must be exercised in accordance with Financial Regulations.

The following responsibilities are delegated to Cluster Business Managers:

General

- 5.1 Ensuring that individual academies are maintaining a register of formal contracts entered into, amounts paid and certificates of completion; are retaining the quotes obtained for goods, works and services and full records of procurement decision processes.
- 5.2 Ensuring that all correct invoices are duly certified by authorised staff before payment and that payments to suppliers are made in line with contractually agreed terms.
- 5.3 Daily oversight of the appropriate division of duties between staff responsible for processing orders, receiving deliveries and processing payments.

Purchasing

The Individual Academy Principals and Delegated Budget Holders are responsible for:

- 5.4 Authorising orders provided they are within the scope and remaining balance of their delegated budget.

The Academy Business Managers are responsible for:

- 5.5 Maintaining a register of formal contracts entered into, amounts paid and certificates of completion.
- 5.6 Retention of quotes obtained for goods, works and services.
- 5.7 Ensuring that all correct invoices are duly certified by authorised staff before payments are made and that invoices, vouchers and other records are retained and stored in a secure way and are readily available for inspection by authorised persons.
- 5.8 Ensuring the appropriate division of duties between staff responsible for processing orders, receiving deliveries and processing payments.

Payroll and Personnel

- 5.9 In the Finance Directors' absence, and by prior arrangement with the CEO, authorising the monthly payroll.
- 5.10 Maintaining proper records of account and reviewing monthly bank reconciliations.

The following responsibilities are delegated to other staff in addition to the Trust Finance Director and Cluster Business Managers:

- 5.11 Running the monthly payroll.
- 5.12 Ensuring that the monthly payroll is checked, and ready for authorisation

Budgets/Budgetary Control

The Individual Academy Principals are responsible for:

- 5.13 Checking and certifying monthly statements of expenditure against their delegated budget and for reporting any errors or irregularities to the Trust Finance Director. Any actual or potential overspending shall also be reported to the Trust Finance Director.

Income

The Academy Business Managers are responsible for:

5.14 Ensuring that all income is accurately accounted for and is promptly collected and banked intact.

Security of Assets

The Academy Business Managers are responsible for:

5.15 Maintaining a permanent and continuous register of all items of furniture, equipment, vehicles and plant over £5,000.

Information and Communication Systems

The Trust IT Director is responsible for:

5.16 Maintaining the standards of control for such systems in operation within the Trust to include the use of properly licensed software, and for the security and privacy of data in accordance with the Data Protection Act.

Delegated Duty	Value	Delegated Authority	Method
Ordering Goods and Services	Up to £5,000	Budget Holder, Principal & either Cluster Business Manager or Trust Finance Director	Selection from preferred supplier list unless agreed otherwise with Finance Manager
	£5,001 to £10,000	Budget Holder, Principal & Trust Finance Director	Minimum of 3 quotes
	£10,001 to £75,000	As above plus Chief Executive Officer	Minimum of 3 quotes
	£75,001 to £250,000	As above plus Finance Committee	Formal Tendering Process, OJEU where appropriate
	Over £250,000	As above plus Board of Directors	As above
	Authority to accept other than lowest quotation or tender	Chief Executive Officer	
Signatories for cheques, BACS payment authorisations and other bank transfers	Any	Two signatories from: <ul style="list-style-type: none"> - Cluster Business Manager - Trust Finance Director - Chief Executive Officer Only one Cluster Business Manager per transaction	
Signatories for EFA grant claims and EFA returns	Any	Two signatories from: <ul style="list-style-type: none"> - Cluster Business Manager - Trust Finance Director - Chief Executive Officer Only one Cluster Business Manager per claim	
Virement of budget provision between budget heads	Up to £75,000	Trust Finance Director & Chief Executive Officer reporting to the Finance Committee	
	Over £75,000	Board of Directors	
Disposal of Assets	Up to £20,000	Chief Executive Officer	
	Over £20,000	As above plus Board of Directors & EFA approval	
Write-off of bad debts	Up to £10,000	Chief Executive Officer	
	Over £10,000	Board of Directors & EFA approval	
Purchase or sale of any freehold property		EFA approval	
Granting or take up of any leasehold or tenancy agreement exceeding three years		EFA approval	
Raising Invoices to collect income		Academy Business Managers	