



Scheme of Delegation

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Our Scheme of Delegation

The following matrix is based on the legal documents that inform the management and running of the Trust namely:

- The Articles of Association of the Trust
- The Master Funding Agreement
- Supplementary Funding Agreements relative to each Academy
- The Academy Financial Handbook
- Scheme of Delegation
- Advice and guidance of the DfE and/or the ESFA

It should be remembered that, although decisions may be delegated, the LGB together with the Trust ++as a whole remains responsible for any decision made under delegation.

Key

Glossary	
CIF	Condition Improvement Fund
FWC	Finance & Workforce Committee
IEB	Interim Executive Board
LF	LGB Leadership Forum
LGB	Local Governing Body
MAT	Multi-Academy Trust

Definitions

R	RESPONSIBLE	The person / group who actually carries out the process or task assignment; responsible for getting the job done
A	ACCOUNTABLE	The person / group ultimately accountable for the process or task being completed appropriately; responsible person (s) is accountable to this group
C	CONSULTED	People who are not directly involved with carrying out the task, but who propose an action or are consulted and may contribute to the shaping
I	INFORMED	Those who receive information about the process or task, or need to stay informed
M	MONITOR	Monitor and assess progress/implementation./outcomes
*	Delegated committee function	Delegation to appropriate Trust or academy level committee.

This Scheme of Delegation applies to all academies rated Outstanding or Good by Ofsted, unless exceptional circumstances apply.

Academies rated as Requires Improvement or Inadequate will have a Scheme of Delegation specific to their circumstances. The degree of delegation, if any, will be determined by Trust Board through its Standards & Values Committee.

1.	Strategy and Leadership	Decision Level					Notes
		Members	Trust Board	CEO ¹ CFO ² OHRO ³	LGB	Head teacher	
1.1	Change the name of the company (Trust)	A/R	C	-	-	-	
1.2	Set vision and strategic objectives of the Trust.	C	A	R	C	C	
1.3	Manage response to legal claims	-	A	R	C	C	
1.4	Design and implement the Strategic Plan	I	A	R	I	I	
1.5	Design and implement Academy Development Plans in line with strategic aims of the Trust annually	-	I	C	A	R	
1.6	Reviewing performance of the Trust	I	A	R	I	I	
1.7	Reviewing performance of Academies and reporting to Trust.	-	I	R	A	R	
1.8	Publish and amend the Scheme of Delegation annually.	-	AR	C	I	I	The Trust Board are body responsible for the Scheme of Delegation
1.9	To consider and approve requests from <ul style="list-style-type: none"> maintained schools LA/DfE for schools requiring improvement support other academies/Trusts to join the Trust. 	I	A/R	C	-	-	Approval of all such requests will depend on Trust fit, capacity, due diligence and financial viability.
1.10	To consider the taking over by, or merging the Trust into, another Trust.	A	R	C	C	C	Wider engagement with the DfE, DBE, LA, Trade Unions and other statutory bodies will also be required.

2.	Governance	Decision Level					Notes
		Members	Trust Board	CEO ¹ CFO ² OHRO ³	LGB	Head teacher	
2.1	To establish and review annually the Trust governance structure		A/R	-	-	-	
2.2	To draw up LGB governance constitution and any amendments thereafter	-	A I	C	R	-	LGB responsibility. MAT consultation to ensure consistency and complaint with MAT Articles, MFA and strategy, and academy SFA.
2.3	To appoint (and remove) the chair of the LGB	-	A I	-	R	-	LGB will propose Chair, Trust Board will approve.
2.4	To appoint and dismiss the clerk to the LGB	-	I	-	A/R*	-	*Applies only if appointed through Governor Services, otherwise to be approved by Trust Board. Until role is centralised.
2.5	To hold a full LGB meeting at least three times in an academy year, or a meeting of the temporary LGB as often may be required	-	M	-	A/R	-	
2.6	To approve the appointment, re-appointment and removal of members of the LGB	-	A/R	-	C	-	As LGBs are MAT Board subcommittees all LGB appointments are made with Board approval in line with MAT policy. Foundation governor appointments in CofE academies are subject to additional diocesan requirements.
2.7	To set up a register of members business interests	-	M	-	A/R	-	Documented through GovernorHub
2.8	To discharge duties in respect of pupils with special needs by appointing a "responsible person"	-	-	M ¹	A	R	
2.9	To consider whether or not to exercise delegation of LGB functions to individuals	-	M	-	A/R	-	
2.10	To regulate the LGB procedures and processes (where not set out in law)	-	A	M ³	R	-	
2.11	To determine the development needs of governors and put in place an appropriate program	-	A/R =	-	A/R =	-	LGBs determine training needs of individual governors. MAT to assist where multi-LGB provision. MAT-provided training, or identification of development provision required.
2.12	To ensure academy website compliance with statutory requirements	-	M	-	A	R	
2.13	To ensure governance oversight of Board, LGBs and staff compliance with statutory and MAT requirements	-	A/M	R ^{1,3}	A	-	LGB or Board responsible for its own level. MAT will monitor compliance.

3.	Procurement and Finance	Decision Level					Notes
		Members	Trust Board	CEO ¹ CFO ² OHRO ³	LGB	Head teacher	
3.1	To agree a Trust-wide funding model	-	A	R ^{1,2}	-	-	
3.2	To establish and monitor a Trust-wide Reserves Policy	-	A	R ^{1,2}	-	-	
3.3	To establish and implement a Trust Scheme of Financial Delegation	-	A	R ^{1,2}	-	-	This details and supplements the provisions in the Trust's Finance Policy
3.4	To determine the scope of mandatory core and non-core services to be delivered by the Trust on behalf of its academies	-	A/R	R ^{1,2}	C	C	Core services are provided within the central academy levy. Non-core services are pan-MAT services but funded by academies outside the central levy.
3.5	To identify those additional services to be procured on behalf of individual academies	-	A/R	-	C	C	LGB to advise MAT Board of potential MAT-wide services not currently centrally procured. MAT Board will consult all academies to determine overall need (e.g. photocopiers/IT)
3.6	To ensure centrally procured services provide value for money	-	A	R	-	-	
3.7	To be aware of all legal claims and ensure appropriate insurance is in place in respect of legal claims	-	A	R	-	-	
3.8	To approve collaboration and partnering arrangements	-	A/R	-	-	-	
3.9	To determine the proportion of the overall academy budget to be delegated to individual academies	-	-	A ²	R	I	Currently whole budget delegated to academies.
3.10	To develop and propose the individual academy budget	-	-	A ²	R	I	
3.11	To approve the first formal budget plan each financial year	-	A/R*	-	-	-	
3.12	To monitor monthly expenditure	-	M*	-	R*	C	
3.13	To monitor half-termly expenditure and forecasts	-	M*	-	R*	C	
3.14	To approve any change between budget headings and/or likely budget overspends	-	-	C ²	R*	C	
3.15	To monitor and report on the use of Pupil Premium, Sports Premium and other grant funding	-	A	C# M*	R	R	#= Support from CFO to academies to generate the information required to report to the Trust Board

3.16	To establish a charging and remissions policy	-	-	-	A/R	C	
3.17	To appoint the Responsible Officer	A	R	I	-	-	
3.18	To enter into contracts up to the limits of delegation and within an agreed budget.	-	A*	R (a)	R (b)		(a) Core; (b) non-core See 3.4/3.6 for contract determination.

4.	Employment and Performance Management	Decision Level					Notes
		Members	Trust Board	CEO ¹ CFO ² OHRO ³	LGB	Head teacher	
4.1	Approval of requests for additional staff	-	-	A/ R ¹⁻³	C	C	A case of need for new posts to be made by academy including costs. To include posts which have been terminated and re-introduced more than 12 months later.
4.2	Headteacher/Head of School appointments and dismissal	-	A(a)	R ^{1,4} (ab)	C (b)	-	(a) MAT will approve the appointment process, advise LGB of MAT requirements for and provide one Board member (normally CEO or Senior Trust Lead STL ⁴) as a full member of the appointment panel. The CEO/STL will have the right, in exceptional circumstances, to veto or delay the appointment. (b) LGB will provide at least one of the appointment panel (normally the Chair). CofE academies have additional diocesan requirements,
4.3	Deputy appointments	-	-	C*	C*	R	CEO will be consulted on DHT appointments and can be invited to support All conditions and processes of 4.2 will apply when Headteacher post also vacant.
4.4	Appoint other teachers	-	-	-	A	R	LGB accountable for ensuring 'safer recruitment' compliance. LGB members may be part of appointments panels. See also 3.1.
4.5	Appoint non-teaching staff	-	-	-	A	R	As 4.4
4.6	Approve re-appointments (vacancies) when reserve balance is 3% or less	-	-	A ^{2,3}	C	R	CFO/OHRO to approve all vacancy recruitments for teachers and other staff prior to advertising to ensure budget sustainability.
4.7	Agree a pay policy	-	A/ R*	-	-	-	
4.8	Pay discretions	-	-	C ²	A	R	Includes UPR pay progression and TLR awards
4.9	Establishing disciplinary/capability procedures (including dismissals, suspensions and ending the suspension of any member of staff, excluding Headteacher/Deputy.	-	-	C	A/R	-	
4.10	Establishing disciplinary/capability procedures (as above) for Headteacher/Deputy	-	A	R	C	-	

4.	Employment and Performance Management	Decision Level					Notes
		Members	Trust Board	CEO ¹ CFO ² OHRO ³	LGB	Head teacher	
4.11	To develop the academy staffing structure	-	-	C	A	R	
4.12	To approve the academy staffing structure	-	A	R	I	C	
4.13	Determining staff complement within agreed budget	-	-	-	A	R	LGB approval from Headteacher recommendations and budget sustainability.
4.14	Determining dismissal payments/early retirement/redundancy	-	A*	A ^{1,2}	R	C	LGB propose arrangements. CEO or MAT Board* (dependant on impact/precedent) approve final arrangements.
4.15	To approve a performance management policy (including continual professional development)	-	A/R	-	-	-	
4.16	To undertake annual performance review of Trust CEO	-	A/R	-	-	-	
4.17	To undertake annual performance review of Headteacher	-	-	A/R	C*	-	HT performance review to be undertaken by CEO with optional contribution by LGB Chair or other nominated governor. One point pay progression automatic unless performance is below expected standard.

5.	Curriculum	Decision Level					Notes
		Members	Trust Board	CEO ¹ CFO ² OHRO ³	LGB	Head teacher	
5.1	To approve curriculum policies (including R.E.)	-	-	C ¹	R		LGB responsible. CEO consulted by HT or LGB if implications to school improvement or Ofsted preparedness.
5.2	Accountability for standards of teaching	-	I	M ¹ C ¹	A	R	
5.3	Responsibility for individual child's education	-	I	M ¹ C ¹	A	R	
5.4	Accountability for individual child's overall development.	-	I	M ¹ C ¹	A	R	
5.5	Approval of a collective worship policy	-	-	-	A/R	-	
6. Target Setting							
6.1	To approve targets for pupil achievement	-	-	C ¹	A	R	Annual approval by LGBs
6.2	Accountability for pupil outcomes	-	-	M ¹	M	A	Direct accountability with headteacher. LGB and CEO monitor HT performance.
6.3	To approve a discipline policy	-	A/R	-	I	I	
7. Policies							
7.1	To determine, on an annual basis, those policies which will be developed by the Trust and mandatory for all academies	-	A/R	-	-	-	
7.2	To provide, on an annual basis, links to all policies and procedures and a schedule for their review	-	R Trust	-	R Acad	-	
7.3	Accountability for ensuring compliance with policies and procedures	-	M	-	M	-	Academies must ensure that there are no local academy policies which duplicate or conflict with Trust policies.
7.4	To publish and amend Trust policies	-	AR	C	I	I	The Trust Board are responsible for Trust policies, and for monitoring their implementation in academies.

8.	Policies	Decision Level					Notes
		Members	Trust Board	CEO ¹ CFO ² OHRO ³	LGB	Head teacher	
8.1	To determine, on an annual basis, those policies which will be developed by the Trust and mandatory for all academies	-	A/R	-	-	-	
8.2	To provide, on an annual basis, links to all policies and procedures and a schedule for their review	-	R Trust	-	R Acad	-	
8.3	Accountability for ensuring compliance with policies and procedures	-	M	-	M	-	Academies must ensure that there are no local academy policies which duplicate or conflict with Trust policies.
8.4	To publish and amend Trust policies	-	AR	C	I	I	The Trust Board are responsible for Trust policies, and for monitoring their implementation in academies.
9. Safeguarding							
9.1	To approve a safeguarding policy	-	A/R	-	I	I	
10. Premises and Health & Safety							
10.1	Buildings insurance and personal liability	-	A	R ²	-	-	
10.2	Developing academy buildings strategy or master plan	-	A/R ²	-	C	C	LGB propose academy plans. MAT Board approve plans.
10.3	Procuring and maintaining buildings, including developing properly funded maintenance plan (including CIF bids)	-	A	R ^{1,2}	R	C	LGB propose academy plans. MAT Board approve plans and funding arrangements. CIF bids submitted centrally. Other capital projects may be delegated to academy to manage/implement.
10.4	To approve a health and safety policy	-	A/R	-	C	-	MAT responsible for core policy. LGB responsible for any appropriate local appendix dealing with academy-specific issues.
10.5	To ensure that health and safety regulations are followed	-	-	M	A	R	

11.	Academy organisation	Decision Level					Notes
		Members	Trust Board	CEO ¹ CFO ² OHRO ³	LGB	Head teacher	
11.1	To publish proposals to change MAT category of academy	-	A/R	-	C	-	
11.2	To set the times of academy sessions	-	-	I	A	R	
11.3	To set the dates of academy terms and holidays	-	-	C	A	R	Currently, term times will take account of arrangements at feeder secondary school to avoid local conflicts.
11.4	To ensure that the academy meets for 380 sessions in an academy year	-	-	M	A	R	

12. Parent Engagement							
12.1	To prepare and publish the academy prospectus	-	-	-	A/R	C	
12.2	To ensure provision of free academy meals to those pupils meeting the criteria	-	-	C ¹	M	A/R	
12.3	Adoption and review of home-academy agreements		-	C ¹	M	A/R	

13. Admissions							
13.1	To produce an admissions policy	-	-	-	A/R	-	Admissions Policy takes account of local circumstances
13.2	To approve an admissions policy	-	-	R ^{1,3}	C	-	Approved by LGB with overview by CEO for MAT-wide consistency.