

# TRUST SCHEME OF DELEGATION

## Scheme of Delegation

### A: Leadership and Governance

		Executive Board (Directors)	Chief Executive Officer (CEO)	Regional Directors x 2 Secondary x 1 Primary & x 1 Director of Education Support	Local Academy Board (LAB)	Headteacher/ Head of School
LEADERSHIP AND GOVERNANCE	<b>Strategic Objectives of the Trust</b>	DETERMINE	ADVISE IMPLEMENT	IMPLEMENT	ADVISE	
	<b>Funding Agreement</b> Comply with all obligations including the Academies Financial Handbook	REVIEW	IMPLEMENT (With Finance Director)		IMPLEMENT	IMPLEMENT
	<b>Regulations</b> All regulations affecting the Trust (including all charity law, company law, employment law and health and safety)	REVIEW	IMPLEMENT			
	<b>Financial Oversight of the Trust</b> Ensuring that there are appropriate financial controls so there is regularity, probity and value for money in relation to the management of public funds	DETERMINE	IMPLEMENT ADVISE (With Finance Director)			
	<b>Business Interests</b> Completing the register of business interests and put in place a procedure to deal with any conflicts of interest and connected party transactions	DETERMINE			ADVISE	
	<b>Appointments and Dismissal Governors</b>	DETERMINE			ADVISE	
	<b>Appointment and Dismissal of the Responsible Officer and Audit Committee</b>	DETERMINE				
	<b>Appointment and Dismissal of the Clerk to the Board and LABs</b>	DETERMINE	ADVISE		ADVISE	
	<b>Appointment and Dismissal of Trust CEO</b>	DETERMINE				
	<b>Appointment and Dismissal of Principals/Head of School</b>		DETERMINE	ADVISE	ADVISE	

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	<b>Appointment and Dismissal of Executive Headteachers/CFO/COO</b>	<b>DETERMINE</b>	<b>ADVISE</b>			
<b>LEADERSHIP AND GOVERNANCE</b>	<b>Policies</b> Review and approval of Trust wide policies	<b>DETERMINE</b>	<b>REVIEW</b> (With Operations Director)	<b>ADVISE</b>	<b>ADVISE</b>	
	<b>Prepare terms of reference for LAB's and Committees</b>	<b>DETERMINE</b>	<b>ADVISE</b>			
	<b>Training programme for Directors and Governors</b>	<b>REVIEW</b>	<b>DETERMINE</b>	<b>ADVISE</b>	<b>ADVISE</b>	<b>ADVISE</b>
	<b>Appraisal of Trust CEO</b>	<b>DETERMINE</b> (Pay Committee)				
	<b>Appraisal of Headteachers/Heads of Schools</b>	<b>REVIEW</b>	<b>DETERMINE</b>	<b>ADVISE</b>	<b>ADVISE</b>	
	<b>Appraisal of Teaching Staff</b>			<b>DETERMINE</b>	<b>REVIEW</b>	<b>IMPLEMENT</b>
	<b>Academy Development Plans (ADP)</b> For each Academy in line with the strategic aims of the Trust			<b>REVIEW</b>	<b>ADVISE</b>	<b>DETERMINE</b>
	<b>Key Performance Indicators (Trust)</b> Setting and reviewing performance of the Trust	<b>DETERMINE</b>	<b>ADVISE</b>			
	<b>Key Performance Indicators (Academy)</b> Setting and reviewing performance of the academies			<b>DETERMINE</b>	<b>ADVISE</b>	

## Scheme of Delegation

### B: Education

		Executive Board (Directors)	Chief Executive Officer (CEO)	Regional Directors x 2 Secondary x 1 Primary & x 1 Director of Education Support	Local Academy Board (LAB)	Headteacher/ Head of School
EDUCATION	<b>Trust Education Strategies</b> (Including Curriculum, T&L, Inclusion etc)	REVIEW	DETERMINE	ADVISE		ADVISE
	<b>Quality of Teaching (Academy)</b> Ensuring appropriate levels of support, challenge and intervention to support delivery of education outcomes		ADVISE	ADVISE REVIEW	REVIEW	DETERMINE
	<b>Curriculum (Academy)</b> Setting the curriculum for the Academies and reviewing its effectiveness		REVIEW	DETERMINE	REVIEW	DETERMINE
	<b>Pupil Premium (PP)</b> Reviewing and challenging the value for money/ROI of the Pupil Premium in terms of educational outcomes and narrowing the achievement gap			DETERMINE ADVISE	REVIEW	ADVISE IMPLEMENT
	<b>Set admissions policy</b>	DETERMINE	ADVISE		ADVISE IMPLEMENT	ADVISE
	<b>Student issues</b> (including uniform, attendance, exclusions, punctuality and disciplinary matters for each Academy)			ADVISE	REVIEW	DETERMINE
	<b>Academy Hours</b> Setting the opening and closing times for the Academies	DETERMINE	REVIEW		ADVISE	ADVISE
	<b>Term dates and length of school day</b>	DETERMINE	REVIEW		ADVISE	ADVISE

## Scheme of Delegation

### C: Finance

		Executive Board (Directors)	Chief Executive Officer (CEO)	Regional Directors x 2 Secondary x 1 Primary & x 1 Director of Education Support	Local Academy Board (LAB)	Headteacher/ Head of School
FINANCE	<b>Funding Model</b> Agreeing a funding model across the Trust (and develop an individual funding model for the Academies) so as to secure the Trust's financial health in the short and long-term.	<b>DETERMINE</b>	<b>ADVISE REVIEW</b> (With Finance Director)	<b>ADVISE</b>	<b>ADVISE</b>	<b>ADVISE</b>
	<b>Trust Annual Budget</b> Formulating and setting the Trust-wide budget and approving annual accounts.	<b>DETERMINE</b>	<b>ADVISE REVIEW</b> (With Finance Director)			
	<b>Academy Annual Budgets</b> Formulation and determining the proportion of the overall budget to be delegated to each Academy (including uses of contingency funds/balances)	<b>DETERMINE</b>	<b>ADVISE REVIEW</b> (With Finance Director)		<b>IMPLEMENT</b>	
	<b>Expenditure and ensuring delivery of Academy annual budgets</b>	<b>REVIEW</b>	<b>REVIEW</b> (With Finance Director)	<b>ADVISE</b>	<b>DETERMINE</b>	<b>IMPLEMENT ADVISE</b>
	<b>Financial Policies</b> Establishing of policies and procedures to ensure compliance with the Trust's financial and reporting requirements, including delegation.	<b>DETERMINE</b>	<b>ADVISE REVIEW</b> (With Finance Director)		<b>IMPLEMENT</b>	
	<b>Trust Risk Register</b>	<b>REVIEW</b>	<b>DETERMINE</b> (With Finance Director)	<b>ADVISE</b>		

## Scheme of Delegation

### D: HR and Operations

		Executive Board (Directors)	Chief Executive Officer (CEO)	Regional Directors x 2 Secondary x 1 Primary & x 1 Director of Education Support	Local Academy Board (LAB)	Headteacher/ Head of School
HR AND OPERATIONS	<b>Establishing Trust-wide HR Policies</b> (Including recruitment, discipline, capability, grievance and absence policies) in accordance with all appropriate regulations	DETERMINE	ADVISE REVIEW (With Operations Director)	IMPLEMENT	ADVISE IMPLEMENT	ADVISE IMPLEMENT
	<b>Setting Terms and Conditions of Employment</b>	DETERMINE	ADVISE			
	<b>Discipline and Grievance Policy</b>	DETERMINE	ADVISE		IMPLEMENT	
	<b>Determining and allocating Central Services provided to the Academies by the Trust</b>	REVIEW	DETERMINE	ADVISE	ADVISE	ADVISE
	<b>Overseeing the effectiveness of services provided centrally by the Trust</b>	REVIEW	DETERMINE	ADVISE	ADVISE	ADVISE
	<b>Asset and Premises Maintenance Strategy</b> Determining use of Academies' premises and ensuring premises are adequately maintained	DETERMINE	ADVISE (With Trust Facilities -- Manager)		ADVISE	
	<b>Acquiring and disposing of Trust land</b>	DETERMINE	ADVISE (With Finance Director)		ADVISE	
	<b>Media and PR</b> Overseeing public relations activities to project the activities of the Trust and the Academies to the wider community		DETERMINE	ADVISE	IMPLEMENT ADVISE	IMPLEMENT
	<b>Trust Prospectus and Website</b> Including Academy corporate design		DETERMINE	ADVISE		ADVISE
	<b>Academy Prospectus and Website</b>			REVIEW	REVIEW	DETERMINE

## Scheme of Delegation

### E: Safeguarding

		Executive Board (Directors)	Chief Executive Officer (CEO)	Regional Directors x 2 Secondary x 1 Primary & x 1 Director of Education Support )	Local Academy Board (LAB)	Headteacher/ Head of School
SAFEGUARDING	Trust Safeguarding Strategy	DETERMINE	REVIEW	ADVISE		
	General Safeguarding Policies & Procedures	DETERMINE	REVIEW	ADVISE		
	Individual Academy Safeguarding Policy			REVIEW		DETERMINE
	Ensure Safeguarding compliance across Trust	DETERMINE	REVIEW	ADVISE		
	Ensure Safeguarding compliance at academy level			ADVISE	DETERMINE	REVIEW
	Ensure Safeguarding compliance at Alternative Provisions			ADVISE	DETERMINE	REVIEW
	Monitoring of Safeguarding arrangements at academy level			ADVISE	DETERMINE	REVIEW
	Monitoring of Safeguarding audits in academies			DETERMINE	ADVISE	REVIEW
	Provision and monitoring of Safeguarding training				DETERMINE	REVIEW

## Glossary

<b>ADVISE</b>	The individual/group that should advise and make recommendations on strategy or how a particular task should be completed.
<b>IMPLEMENT</b>	The individual/group that has responsibility for undertaking the particular task delegated to them and reporting on its delivery at suitable intervals.
<b>DETERMINE</b>	The individual/group that has primary responsibility for ensuring the particular task is completed and determining how the Trust and/or Academies (as appropriate) should undertake the task including determining appropriate milestones and targets to be reported against.
<b>REVIEW</b>	The individual/group that has responsibility for reviewing whether a particular task is being carried out satisfactorily and where appropriate, requiring action to be taken to ensure the task is delivered appropriately.



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Executive Board (Directors)	
DETERMINE	
LG	Strategic Objectives of the Trust
	Financial Oversight of the Trust
	Business Interests
	Appointments and Dismissal of Governors
	Appointment and Dismissal of the Responsible Officer and Audit Committee
	Appointment and Dismissal of the Clerk to the Board and LABs
	Appointment and Dismissal of Trust CEO
	Appointment and Dismissal of Executive Headteachers/COO/CFO
	Policies
	Prepare terms of reference for LAB's and Committees
	Appraisal of Trust CEO
	Key Performance Indicators (Trust)
E	Set admissions policy
	Academy Hours
	Term dates and length of school day
F	Funding Model
	Trust Annual Budget
	Academy Annual Budgets
	Financial Policies
HRO	Establishing Trust-wide HR Policies
	Setting Terms and Conditions of Employment
	Discipline and Grievance Policy
	Asset and Premises Maintenance Strategy
	Acquiring and disposing of Trust land
SG	Trust Safeguarding Strategy
	General Safeguarding Policies & Procedures
	Ensure Safeguarding compliance across Trust
REVIEW	
LG	Funding Agreement
	Regulations
	Training programme for Directors and Governors
	Appraisal of Headteachers/Heads of Schools
E	Trust Education Strategies
F	Expenditure and ensuring delivery of Academy annual budgets
	Trust Risk Register
HRO	Determining and allocating Central Services provided to the Academies by the Trust
	Overseeing the effectiveness of services provided centrally by the Trust

## Scheme of Delegation - Summary

Chief Executive Officer "CEO"	
ADVISE	
LG	Strategic Objectives of the Trust
	Financial Oversight of the Trust
	Appointments and Dismissal of Executive Headteachers/COO/CFO
	Appointment and Dismissal of the Clerk to the Board and LABs
	Prepare terms of reference for LAB's and Committees
	Key Performance Indicators (Trust)
E	Quality of Teaching (Academy)
	Set admissions policy
F	Funding Model
	Trust Annual Budget
	Academy Annual Budgets
	Financial Policies
HRO	Establishing Trust-wide HR Policies
	Setting Terms and Conditions of Employment
	Discipline and Grievance Policy
	Asset and Premises Maintenance Strategy
	Acquiring and disposing of Trust land
IMPLEMENT	
LG	Strategic objectives of the Trust
	Funding Agreement
	Regulations
	Financial Oversight of the Trust
DETERMINE	
LG	Appointment and Dismissal of Principals/Head of School
	Training programme for Directors and Governors
	Appraisal of Headteachers/Heads of Schools
E	Trust Education Strategies
F	Trust Risk Register
HRO	Determining and allocating Central Services provided to the Academies by the Trust
	Overseeing the effectiveness of services provided centrally by the Trust
	Media and PR
	Trust Prospectus and Website
REVIEW	
LG	Policies
E	Curriculum (Academy)
	Academy Hours
	Term dates and length of school day
F	Funding Model
	Trust Annual Budget
	Academy Annual Budgets
	Expenditure and ensuring delivery of Academy annual budgets
	Financial Policies

## Scheme of Delegation - Summary

Chief Executive Officer "CEO"	
HRO	Establishing Trust-wide HR Policies
SG	Trust Safeguarding Strategy
	General Safeguarding Policies & Procedures
	Ensure Safeguarding compliance across Trust

## Scheme of Delegation - Summary

Regional Directors x 2 Secondary x 1 Primary & x 1 Director of Education Support	
ADVISE	
LG	Appointment and Dismissal of Principals/Head of School
	Policies
	Training programme for Directors and Governors
	Appraisal of Headteachers/Heads of Schools
E	Trust Education Strategies
	Quality of Teaching (Academy)
	Pupil Premium (PP)
	Student issues
F	Funding Model
	Expenditure and ensuring delivery of Academy annual budgets
	Trust Risk Register
HRO	Determining and allocating Central Services provided to the Academies by the Trust
	Overseeing the effectiveness of services provided centrally by the Trust
	Media and PR
	Trust Prospectus and Website
SG	Trust Safeguarding Strategy
	General Safeguarding Policies & Procedures
	Ensure Safeguarding compliance across Trust
	Ensure Safeguarding compliance at academy level
	Ensure Safeguarding compliance at Alternative Provisions
	Monitoring of Safeguarding arrangements at academy level
IMPLEMENT	
LG	Strategic Objectives of the Trust
HRO	Establishing Trust-wide HR Policies
DETERMINE	
LG	Key Performance Indicators (Academy)
	Appraisal of Teaching Staff
E	Curriculum (Academy)
	Pupil Premium (PP)
SG	Monitoring of Safeguarding audits in academies
REVIEW	
LG	Academy Development Plans (ADP)
HRO	Academy Prospectus and Website
SG	Individual Academy Safeguarding Policy

## Scheme of Delegation - Summary

Local Academy Board (LAB)	
ADVISE	
LG	Strategic Objectives of the Trust
	Business Interests
	Appointments and Dismissal of Directors and Governors
	Appointments and Dismissal of the Clerk to the Board and LABs
	Appointment and Dismissal of Principals/Head of School
	Policies
	Training programmes for Directors and Governors
	Appraisal of Headteachers/Heads of Schools
	Academy Development Plans (ADP)
	Key Performance Indicators (Academy)
E	Set admissions policy
	Academy Hours
	Term dates and length of school day
F	Funding Model
HRO	Establishing Trust-wide HR Policies
	Acquiring and disposing of Trust land
	Determining and allocating Central Services provided to the Academies by the Trust
	Overseeing the effectiveness of services provided centrally by the Trust
	Asset and Premises Maintenance Strategy
	Media and PR
SG	Monitoring of Safeguarding audits in academies
IMPLEMENT	
LG	Funding Agreement
E	Set admissions policy
F	Financial Policies
	Academy Annual Budgets
HRO	Establishing Trust-wide HR Policies
	Discipline and Grievance Policy
	Media and PR
DETERMINE	
F	Expenditure and ensuring delivery of Academy annual budgets
SG	Ensure Safeguarding compliance at academy level
	Ensure Safeguarding compliance at Alternative Provisions
	Monitoring of Safeguarding arrangements at academy level
	Provision and monitoring of Safeguarding training
REVIEW	
LG	Appraisal of Teaching Staff
E	Quality of Teaching (Academy)
	Curriculum (Academy)
	Pupil Premium (PP)
	Student issues
HRO	Academy Prospectus and Website

## Scheme of Delegation - Summary

Headteacher/Head of School	
ADVISE	
LG	Training programme for Directors and Governors
E	Trust Education Strategies
	Pupil Premium (PP)
	Set admissions policy
	Academy Hours
	Term dates and length of school day
F	Funding Model
	Expenditure and ensuring delivery of Academy annual budgets
HRO	Establishing Trust-wide HR Policies
	Determining and allocating Central Services provided to the Academies by the Trust
	Overseeing the effectiveness of services provided centrally by the Trust
	Trust Prospectus and Website
IMPLEMENT	
LG	Funding Agreement
	Appraisal of Teaching Staff
E	Pupil Premium (PP)
F	Expenditure and ensuring delivery of Academy annual budgets
HRO	Establishing Trust-wide HR Policies
	Media and PR
DETERMINE	
LG	Academy Development Plans (ADP)
E	Quality of Teaching (Academy)
	Curriculum (Academy)
	Student issues
HRO	Academy Prospectus and Website
SG	Individual Academy Safeguarding Policy
REVIEW	
SG	Ensure Safeguarding compliance at academy level
	Ensure Safeguarding compliance at Alternative Provisions
	Monitoring of Safeguarding arrangements at academy level
	Monitoring of Safeguarding audits in academies
	Provision and monitoring of Safeguarding training