

TRUST SCHEME OF DELEGATION



A: Leadership and Governance

		Executive Board (Directors)	Trust Principal	Executive Headteacher (EHT)	Local Academy Board (LAB)	Headteacher/ Head of School
LEADERSHIP AND GOVERNANCE	Strategic Objectives of the Trust	DETERMINE	ADVISE IMPLEMENT	IMPLEMENT	ADVISE	
	Funding Agreement Comply with all obligations including the Academies Financial Handbook	REVIEW	IMPLEMENT (With Finance Director)		IMPLEMENT	IMPLEMENT
	Regulations All regulations affecting the Trust (including all charity law, company law, employment law and health and safety)	REVIEW	IMPLEMENT			
	Financial Oversight of the Trust 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)			
	Business Interests 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	
	Appointments and Dismissal Governors	DETERMINE			ADVISE	
	Appointment and Dismissal of the Responsible Officer and Audit Committee	DETERMINE				
	Appointment and Dismissal of the Clerk to the Board and LABs	DETERMINE	ADVISE		ADVISE	
	Appointment and Dismissal of Trust Principal	DETERMINE				
	Appointment and Dismissal of Principals/Head of School		DETERMINE	ADVISE	ADVISE	
	Appointment and Dismissal of Executive Headteachers/CFO/COO	DETERMINE	ADVISE			

Scheme of Delegation

A: Leadership and Governance

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

B: Education

		Executive Board (Directors)	Trust Principal	Executive Headteacher (EHT)	Local Academy Board (LAB)	Headteacher/ Head of School
EDUCATION	Trust Education Strategies (Including Curriculum, T&L, Inclusion etc)	REVIEW	DETERMINE	ADVISE		ADVISE
	Quality of Teaching (Academy) Ensuring appropriate levels of support, challenge and intervention to support delivery of education outcomes		ADVISE	ADVISE REVIEW	REVIEW	DETERMINE
	Curriculum (Academy) Setting the curriculum for the Academies and reviewing its effectiveness		REVIEW	DETERMINE	REVIEW	DETERMINE
	Pupil Premium (PP) 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
	Set admissions policy	DETERMINE	ADVISE		ADVISE IMPLEMENT	ADVISE
	Student issues (including uniform, attendance, exclusions, punctuality and disciplinary matters for each Academy)			ADVISE	REVIEW	DETERMINE
	Academy Hours Setting the opening and closing times for the Academies	DETERMINE	REVIEW		ADVISE	ADVISE
	Term dates and length of school day	DETERMINE	REVIEW		ADVISE	ADVISE

C: Finance

		Executive Board (Directors)	Trust Principal	Executive Headteacher (EHT)	Local Academy Board (LAB)	Headteacher/ Head of School
FINANCE	Funding Model 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.	DETERMINE	ADVISE REVIEW (With Finance Director)	ADVISE	ADVISE	ADVISE
	Trust Annual Budget Formulating and setting the Trust-wide budget and approving annual accounts.	DETERMINE	ADVISE REVIEW (With Finance Director)			
	Academy Annual Budgets Formulation and determining the proportion of the overall budget to be delegated to each Academy (including uses of contingency funds/balances)	DETERMINE	ADVISE REVIEW (With Finance Director)		IMPLEMENT	
	Expenditure and ensuring delivery of Academy annual budgets	REVIEW	REVIEW (With Finance Director)	ADVISE	DETERMINE	IMPLEMENT ADVISE
	Financial Policies Establishing of policies and procedures to ensure compliance with the Trust's financial and reporting requirements, including delegation.	DETERMINE	ADVISE REVIEW (With Finance Director)		IMPLEMENT	
	Trust Risk Register	REVIEW	DETERMINE (With Finance Director)	ADVISE		

D: HR and Operations

		Executive Board (Directors)	Trust Principal	Executive Headteacher (EHT)	Local Academy Board (LAB)	Headteacher/ Head of School
HR AND OPERATIONS	Establishing Trust-wide HR Policies (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
	Setting Terms and Conditions of Employment	DETERMINE	ADVISE			
	Discipline and Grievance Policy	DETERMINE	ADVISE		IMPLEMENT	
	Determining and allocating Central Services provided to the Academies by the Trust	REVIEW	DETERMINE	ADVISE	ADVISE	ADVISE
	Overseeing the effectiveness of services provided centrally by the Trust	REVIEW	DETERMINE	ADVISE	ADVISE	ADVISE
	Asset and Premises Maintenance Strategy Determining use of Academies' premises and ensuring premises are adequately maintained	DETERMINE	ADVISE (With Estates Manager)		ADVISE	
	Acquiring and disposing of Trust land	DETERMINE	ADVISE (With Finance Director)		ADVISE	
	Media and PR Overseeing public relations activities to project the activities of the Trust and the Academies to the wider community		DETERMINE	ADVISE	IMPLEMENT ADVISE	IMPLEMENT
	Trust Prospectus and Website Including Academy corporate design		DETERMINE	ADVISE		ADVISE
	Academy Prospectus and Website			REVIEW	REVIEW	DETERMINE



Glossary

Advise	The individual/group that should advise and make recommendations on strategy or how a particular task should be completed.
Implement	The individual/group that has responsibility for undertaking the particular task delegated to them and reporting on its delivery at suitable intervals.
Determine	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.
Review	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.



Scheme of Delegation - Summary

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 Principal
	Appointment and Dismissal of Executive Headteachers/COO/CFO
	Policies
	Prepare terms of reference for LAB's and Committees
	Appraisal of Trust Principal
	Key Performance Indicators (Trust)
	E
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
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

Trust Principal	
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
HRO	Establishing Trust-wide HR Policies



Scheme of Delegation - Summary

Executive Headteacher (EHT)	
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
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)
REVIEW	
LG	Academy Development Plans (ADP)
HRO	Academy Prospectus and Website



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
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
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