Scheme of Delegation

The Trustee Board accountable in law for all major decisions about our academies. However, this does not mean that the Board is required to carry out all the Trust's governance functions and many are delegated, including, for example, to the CEO, to the committees and to school leaders.

It is vital that the decision to delegate a function is made by the full Board of Trustees and is recorded. Without such delegation, the individual or committee has no power to act.

The scheme of delegation (SoD) is the key document defining the lines of responsibility and accountability in the Trust. It aims be a simple, yet systematic way, of ensuring that the Members, Trustees, Board committee(s), senior Trust leadership and Headteachers are all clear about their roles and responsibilities. This overarching SoD for all decision making in the Trust should not be confused with the written scheme of delegation of financial powers referred to in the Academy Trust Handbook.

This Scheme of Delegation is structured in accordance with the functions:

- Governance
- Strategy
- Education and Curriculum
- Human Resources
- Estates and Technology
- Finance
- Health & Safety
- Communication & Marketing
- Safeguarding

Under each function the role of each level of governance is identified using the key:

T = Trustees

CEO = CEO

E = Executive Officers

HT = Headteacher

LAB = Local Advisory Board

Responsible
Those responsible for the task, who ensure that it is done.

Accountable
Those ultimately answerable for the correct and thorough completion of the deliverable or task, and who delegate the work to those responsible.

Support
Those who provide to those responsible.

Consulted

Those whose opinions are sought, and with whom there is two-way communication.Those who are kept up to date on progress and key information.

Informed

The Trust's Scheme of Delegation is renewed and approved by the Board annually, so that the rolesand responsibilities outlined continually reflect organisational realities and updates to statutory legislation.

Governance		T	CEO	E	LAB	HT
1	Create and update governance documentation including Terms of Reference (TOR) and Scheme of Delegation (SOD)	A	R	S	I	I
2	Appoint (and remove) the chair of the LAB	A*	S	C	C	I
3	Appoint and dismiss the clerk to the LAB	A	I	S	R	I
4	Approve the appointment of members of the LAB	A	I	C	R	C
5	Remove members of the LAB other than the chair	A	I	S	R	C
6	Actively seek LAB members	A	I	S	R	S
7	Maintaining a Register of Business Interests for the Trust	A	I	R	I	I
8	Maintaining a Register of Business Interests for the Local Governing Body	A	I	S	S	R
9	Conducting meetings of the Local Governing Body in accordance with the Trust framework	A	S	S	R	S
10	Setting the model agenda and frequency of meetings of the Local Governing Body	A	S	R	I	I
11	Completing a Skills audit annually for Trustees and Governors and appropriate programme of support put in place	A	I	R	S	I
12	Produce and update statutory and best practice Trust policies in accordance with the policy renewal cycle	A	R	S	C	C
13	Implement Trust policies	A	S	S	I	R
14	Produce and update policies particular to the school	A	I	S	C	R
15	Implementation of the lettings policy at the school level	A	S	S	R	R

Strategy		T	CEO	E	LAB	HT
16	Setting the vision, ethos, values and strategic aims of the school ensuring they align to those of the Trust	A	I	C	R	S
17	Establish and monitor the Trust strategic plan	A	R	S	I	I
18	Determine the scope of central services to be delivered by EET to schools	A	R	S	I	I
19	Identify additional services to be procured on behalf of schools	A	C	R	I	C

		T	CEO	E	LAB	HT
20	Ensure centrally delivered and procured services provide value for money	A	R	S	I	C
21	Maintaining a Risk Register in accordance with the Trust's risk management framework and review the Risk Register at least annually	A	R	R	I	S
22	Produce and update the Operations Handbook	A	C	R	I	C
23	Monitor compliance with Operation Handbook	A	S	R	I	S
24	Develop and implement KPIs	A	C	R	I	C
25	Decisions regarding growth, mergers and significant change applications	A	R	S	I	I

School Organisation

		T	CEO	E	LAB	HT
26	Set the timing of the school day and the dates of school terms and holidays	A	I	C	C	R
27	Setting/amending an admissions policy for the school	A*	S	S	C	C
28	Admissions application decisions for individual in year, over PAN and deferred admission	A	I	S	R	S
29	If appropriate, appeal against LA directions to admit pupil(s)	A	I	S	C	R
30	Publish proposals to change category of school	A	C	R	C	S
31	Prepare and publish the school prospectus	A	I	S	I	R
32	Ensure school website is fully compliant (including social media)	A	I	S	I	R
33	Prepare & ensure trust website is fully compliant (including social media)	A	C	R	I	I

Education & Curriculum

		T	CEO	E	LAB	HT
34	Implementation of Education Strategy	A	S	R	C	R
35	Propose targets for pupil achievement	A	I	S	C	R
36	Approve targets for pupil achievement	A	S	R	I	C
37	Establish and update the Trust behaviour policy	A	S	R	I	C
38	Carry out a review of the Headteacher's decision to issue a suspension of a pupil	A	S	C	R	I

#	Task	T	CEO	E	LAB	HT
39	Decision to make a permanent exclusion	A	S	C	I	R
40	Produce the School Development Plan	A	I	S	C	R
41	Approve the School Development Plan	A	I	R	I	S
42	Compile post-inspection action plans and RAPs (raising attainment plans)	A	C	S	I	R
43	Maintain accurate, effective and secure pupil records	A	I	S	I	R
44	Collate data for pupil assessment and other returns	A	I	S	I	R
45	Develop and implement a school curriculum policy	A	I	S	C	R
46	Develop and implement Trust curriculum vision and strategy	A	R	R	I	R
47	Ensure that all pupils take part in a daily act of collective worship	A	I	S	S	R
48	Discharge duties in respect of pupils with special educational needs and disabilities	A	C	S	S	R
49	To establish, adopt and review the policies and provision for Collective Worship and Religious Education	A	C	R	S	R
50	Approving the approach to RE to be adopted throughout the Trust	A	C	R	C	C
51	To establish, adopt and review the policies and provision for RSE	A	C	R	S	R
52	Approving the approach to RSE to be adopted throughout the Trust	A	C	R	C	C

Safeguarding		T	CEO	E	LAB	HT
53	Ensure a trust wide safeguarding policy template is in place and compliant with statutory guidance	A	C	R	I	C
54	Ensure individual school safeguarding policies are in place and compliant with statutory guidance	A	I	S	S	R
55	Ensure trust wide compliance strategy for training and recruitment of key safeguarding post	A	C	R	S	R

Human Resources		T	CEO	E	LAB	HT
56	Draft and update all employee contracts and HR policies & processes, job descriptions including job evaluations and grade	A	C	R	I	C
57	Appoint the Headteacher	A	R	S	S	I

#	Task	T	CEO	E	LAB	HT
58	Dismiss or suspend the Headteacher	A	S	R	I	I
59	Appoint the Deputy Headteacher	A	C	S	R	R
60	Dismiss, warn, or suspend the Deputy Headteacher	A	C	S	C	R
61	Appoint, dismiss, warn or suspend all other school staff (lower than Deputy level)	A	I	S	R	R
62	Ensure that professional learning reviews are carried out in accordance with the approved professional learning review policy which is in place	A	R	S	I	S
63	Conduct the professional learning review of the Headteacher	A	I	R	S	C
64	Approval of pay awards for headteachers and Executive Leaders, where applicable	A*	C	S	I	I
65	Approval of pay awards for central team, excluding Executive Leaders	A	R	C	I	I
66	Agreement of additional payments including TLR, SEN, discretionary allowances, retention and recruitment allowances	A	C	R	I	C
67	To ensure all staff pay awards are managed through professional learning review and capability policy and the annual pay committee meetings, following the approved pay policy	A	R	R	C	S
68	Formulate Staff Handbook using Trust template	A	I	C	C	R
69	Determine staff structure within agreed budget	A	I	C	C	R
70	Approval of formal restructure plans that could lead to redundancies	A	R	I	C	C
71	Determine settlement payment/early retirement Headteacher	A	R	S	C	I
72	Determine settlement payment/early retirement of all other staff	A	I	S	C	R
73	Monitor and support the wellbeing of all staff including through staff surveys	A	I	R	I	R

Health & Safety		T	CEO	E	LAB	HT
74	Create and update the Trust health and safety and policy	A	C	R	I	S
75	Create and update the Trust critical incident policy	A	C	R	I	S
76	Implement the school health and safety policy	A	I	S	I	R

		T	CEO	E	LAB	HT
77	Implement the school critical incident policy	A	I	S	I	R
78	Place insurance for buildings, contents and other liabilities	A	C	R	I	C
79	Ensure that health and safety regulations are followed	A	I	S	I	R
80	Manage the school premises and ensure security	A	I	S	I	R
81	Ensure all mandatory risk assessments are reviewed and updated	A	I	S	I	R
82	Ensure staff and governors are compliant in line with statutory training (Health & Safety, Safeguarding, DSL)	A	I	S	I	R
83	Approve a suite of health and safety KPIs and ensure performance is regularly reported on	A	C	R	I	S

Estates		T	CEO	E	LAB	HT
84	Develop school buildings and facilities estate long-term strategy or master plan	A	C	R	C	S
85	Produce and maintain buildings, including developing properly funded maintenance plan (deco, strategy testing)	A	I	S	I	R

Technology		T	CEO	E	LAB	HT
86	Produce and update the Trust IT strategy, setting minimum requirements for digital systems including security and back up	A	C	R	I	C
87	Formulate the school IT strategy within the framework set by the Trust IT strategy	A	I	S	I	R

Finance		T	CEO	E	LAB	HT
88	Develop and propose the individual school budget and capital plan	A	C	S	C	R
89	Approve the formal budget plan each financial year and submit to the ESFA all financial returns.	A*	S	S	I	C
90	Plan, manage and monitor monthly expenditure and financial reports, and identify actual or potential items of budget overspend/underspend	A	I	S	I	R
91	Approve any variations to budget and/or likely budget overspends within EET	A	C	R	I	C
92	Establish financial decision levels and limits	A	C	R	I	I
93	Develop and implement reserves and investment policy and approve the intended use of reserves	A	C	R	I	I
94	Establish a charging and remissions policy for the school	A	C	R	I	I

#	Task	T	CEO	E	LAB	HT
95	Appoint the internal auditor	A	C	R	I	I
96	Abide by the financial limits and authorisation levels set within the Financial Regulations Manual and Operations Handbook	A	C	R	I	R
97	Appoint external auditors	A**	C	S	I	I
98	Develop risk management strategies	A	R	R	S	R
99	Monitoring & ensuring effective use of specific targeted resources e.g., sports premium and pupil premium	A	C	S	C	R
100	Ensure SRMA Tool is completed annually to ensure benchmarking and value for money	A	I	S	I	R
101	Monitor compliance with the Trust Asset & Capital Management procedures including records, depreciation & disposals.	A	I	R	I	S
102	Monitor financial performance against approved budgets	A	I	S	I	R
103	Ensure submission of statutory reports in a timely manner	A	I	R	I	S
104	Develop and implement internal controls	A	C	R	I	S
105	Compliance with delegated financial limits as per the Financial Regulations Manual	A	C	R	I	R
	All other finance decisions to be carried out in accordance with the current version of the DFE Academy Handbook					

Communication & Marketing	T	CEO	E	LAB	HT
106 Promote effective communication with external stakeholders, including local businesses	A	I	I	S	R
107 Ensure parental support, undertaking annual pupil and parent satisfaction surveys	A	C	R	I	R
108 Positively increase the school's profile	A	C	S	C	R
109 Build relationships with external organisations that can add value to the school	A	R	R	R	R
110 Developing brand guidelines for the Trust and schools	A	C	R	I	I
111 Implementing Trust brand guidelines	A	R	R	I	R

Church School Ethos	T	CEO	E	LAB	HT
112 Ensure compliance with SIAMS	A	S	S	R	R

113	Ensuring clarity of Christian ethos, vision and strategic direction	A	S	S	R	R
114	Promote education which is consistent with the faith and practice of the Methodist Church and ensuring that the Christian ethos of the school is preserved and developed	A	S	S	R	R

* Trustees are accountable and responsible in this instance

** Members are accountable and responsible in this instance