

Scheme of Delegation Grid

MEMBERS' RESPONSIBILITIES		
	Function	Action
1	Annual Report & Accounts (approved by Trust Board)	Receive
2	Articles of Association	Review and agree
3	Direction to trustees to take specific action	By special resolution
4	External Auditors	Appoint
5	Failing Trust	Dissolve <i>(in conjunction with the DfE)</i>
6	Members <i>(additional)</i>	Appoint/remove
7	Trustees <i>(up to 11)</i>	Appoint/remove
8	Name of Organisation	Change

Key	✓	Function/decision-making are at this level	C	In consultation with, prior to decision-making	CFO	Chief Finance Officer	COM	Trust Board Committee
	DE	Director of Education	ECM	Estates & Compliance Manager	FAR	Finance, Audit & Risk Committee (Embrace)	HT	Headteacher / Principal
	LGC	Local Governing Committee	SC	Standards Committee (Embrace)	TB	Trust Board	TL	Trust Leader

Note: Trust Board level decisions may be delegated to a board committee, but not to the Trust Leader (TL), Local Governing Committee (LGC) or Headteacher (HT)

Function				Action	TB	COM	TL	LGC	HT
EDUCATION, CURRICULUM AND STANDARDS									
1	Admission & Attendance Registers	Trust		Ensure compliance with regulations	✓				
				Monitor attendance data	✓	SC			
		School		Maintain					✓
				Monitor attendance data				✓	
2	Behaviour Policy			Add school level detail & implement					✓
				Approve			✓		
				Monitor effectiveness				✓	
3	Careers Guidance			Ensure compliance with statutory requirements			✓		
				Deliver					✓
				Monitor				✓	
4	Curriculum Policy <i>(balanced and broadly based – including RE, RSHE, Collective Worship)</i>			Ensure compliance with statutory requirements	✓	SC	C		
				Develop and establish			C DoE	C	✓
				Implement					✓
				Monitor provision				✓	

Function					Action	TB	COM	TL	LGC	HT	
					Monitor effectiveness			✓ DoE			
					Publish on school website					✓	
5	Early Years Foundation Stage Framework <i>(if applicable)</i>				Delivery in line with statutory requirements					✓	
					Monitor				✓		
6	Exclusions & Suspensions			Suspension	Issue					✓	
				Permanent exclusion	Must consult TL before issuing			C		✓	
				Panels <i>(in line with requirements of current DfE statutory guidance)</i>	Review			C	✓		
				Data	Trust wide	Monitor	✓	SC			
					School	Monitor				✓	
7	Pupil Premium Spend Strategy & Primary PE & Sports Premium Strategy				Implement and report as required					✓	
					Scrutinise/discuss rationale with HT/PP Lead & monitor impact				✓		
8	Quality of Education Provision, Standards and Outcomes			Trust wide	Ensure			✓			
				School	Monitor	✓	SC	C DoE			
					Responsible for					✓	
					Monitor				✓		
9	School Performance Data <i>(targets/expectations)</i>				Set			C		✓	
					Monitor progress against targets			✓ DoE	✓		
					Oversight	✓	SC				
10	SENDCO				Ensure appointed				✓		
11	SEND <i>(Code of Practice / policy / staff training)</i>				Ensure compliance with statutory requirements	✓					
					Implement <i>(at school level)</i>					✓	
					Monitor <i>(at school level)</i>				✓		
12	School Improvement Plan <i>(in line with trust priorities)</i>			School	Write			C		✓	
				Approve			✓				
				Trust	Monitor implementation & impact				✓		
						✓					
ESTATES MANAGEMENT, HEALTH & SAFETY, and IT											
13	Buildings Insurance and Personal Liability Insurance				Ensure in place	✓	FAR				
14	Capital Allocations				Review school estates plan			✓	C	C	
					Monitor trust estates strategy	✓	FAR				

Function				Action	TB	COM	TL	LGC	HT
				Approve projects £100k+	✓	FAR			
				Approve projects up to £100k			✓		
15	Health and Safety <i>(Legal duty of care to protect the health, safety and welfare of employees and that non-employees are not exposed to risks to their health & safety)</i>	Annual school H&S audits		Check completed & recommendations implemented	✓	FAR	C ECM		
		Awareness		Ensure staff aware of responsibilities			✓		✓
		Culture	Trust	Develop across trust			✓ ECM		
			School	Develop across school					✓
		Governance	Trust	Monitor effectiveness of policy & implementation <i>(H&S trustee)</i>	✓	FAR			
			School	Monitor effectiveness of policy & implementation <i>(H&S governor)</i>				✓	
		Implementation		Implement policy					✓
		Policy		Review and approve	✓	FAR			
		Regulatory compliance	Trust	Ensure	✓	FAR	C ECM		
			School	Monitor			C ECM	✓	
		Statutory training	Trust	Ensure up-to-date and compliant			✓		
			School						
16	Monitoring & Filtering Provision		School	Ensure reviewed annually				✓	
17	IT Strategic Plan			Set & approve			✓		
				Monitor	✓	FAR			
18	Premises Improvement Programme		Trust Wide	Review	✓	FAR			
			School	Review annually with ECM				C	✓
			School	Annual site walk <i>(ECM & H&S gov)</i>				✓	
FINANCE									
19	Annual Report & Audited Accounts			Approve and present to members	✓				
20	Auditors <i>(external)</i>		Appointment	Recommend to members	✓				
21	Auditors' Report <i>(external)</i>			Receive and respond	✓				
22	Budget Plans <i>(to support delivery of key priorities)</i>		School	Prepare future budget plans & review for trust approval			C TL/CFO	C	✓
				Review & propose to Trust Board for approval	✓	FAR			
				Approve <i>(annually - July)</i>	✓				
				Manage school budget					✓
				Monitor budget performance			C TL/CFO	✓	

Function			Action	TB	COM	TL	LGC	HT
		Trust (central)	Approve	✓				
			Monitor (minimum three times a year)	✓	FAR			
23	Financial Pooling & Centralisation Arrangements (within FP&C Policy)		Review and determine (annually)	✓	FAR	C CFO		
24	Charging and Remissions Policy		Review & approve	✓	FAR			
			Propose school chargeable rates					✓
			Approve school chargeable rates				✓	
			Publish on school website					✓
25	Contracts/Orders up to delegated limits (within Financial Procedures)		Approve (differs, according to financial limits)			✓ CFO		✓
26	Debts (school)		Monitoring					✓
			Write off (differs according to limits in Financial Procedures)	✓	FAR	✓		
27	DfE required reports and returns		Ensure submitted	✓				
28	Financial Pooling Appeals from headteacher (within FP&C Policy)		Review & decide (stage1)			✓	C	
			Review & decide (stage 2)	✓	FAR			
29	Financial Procedures (including financial scheme of delegation)		Approve	✓	FAR			
			Implement at school level					✓
30	Financial Scheme of Delegation (within Financial Procedures)		Review (annually or at times of change in trust management/structure)	✓	FAR			
31	Financial Transaction Limits (see Financial Procedures)		Establish/agree/review decision levels and limits	✓	FAR	C		
32	Fixed Assets (expenditure over £5,000)		Report to central finance team					✓
			Authorise disposal			✓ CFO		
33	Insurance Arrangements (within Financial Procedures - Risk Protection Arrangements – RPA)		Ensure in place (annually)	✓	FAR			
34	Internal Audit Plan & Controls (annual programme of internal scrutiny – financial & non-financial)		Approve	✓	FAR			
			Monitor (trust wide - for assurance)	✓	FAR			
			Monitor (school level – for assurance)				✓	
35	Lettings Charges	School	Agree			C ECM	C	✓
36	Management Accounts and Forecasts (for current year and beyond)		Receive (monthly)	✓	Chair			
			Agenda & review	✓	FAR			
37	Related Party Transactions		Approve in advance of transaction			✓		
38	Virements - Reallocation Within School Budget (see Financial Procedures)		Approve			C		✓
GOVERNANCE: PEOPLE								
39	Accounting Officer		Appoint & dismiss	✓				

Function			Action	TB	COM	TL	LGC	HT
40	Chair & Vice Chair <i>(elected annually at first meeting of academic year)</i>	Trust Board	Elect <i>(annually)</i>	✓				
		LGC	Elect <i>(annually)</i> <i>(subject to TB approval)</i>				✓	
			Approve LGC Chair	✓				
41	Health & Safety Trustee & Governor	Trustee	Appoint/remove	✓				
		Governor					✓	
42	Governance Professional <i>(clerk)</i>	Trust Board	Appoint/remove	✓				
		LGC					✓	
43	Finance Trustee <i>(must have relevant skill set / experience of financial matters)</i>		Ensure appointed	✓				
44	Local Governors <i>(not applicable for elected parent & staff governors)</i>		Appoint/remove	✓				
45	Local Governor Election <i>(parent & staff governors)</i>		Arrange				C	✓
46	Safeguarding Trustee & Governor <i>(strategic responsibility for trust/school wider safeguarding arrangements)</i>	Trustee	Appoint/remove	✓				
		Governor					✓	
47	SEND Trustee & Governor <i>(oversight of trust/school SEND arrangements)</i>	Trustee	Appoint/remove	✓				
		Governor					✓	
48	Skills Audit	Trust Board	Complete <i>(2-yearly)</i>	✓				
		LGC					✓	
49	Succession Planning	Trust Board	Review	✓				
		LGC					✓	
50	Trust Board Committee Chairs <i>(see LGC chair above)</i>		Appoint/remove	✓				
51	Trust Board Finance, Audit & Risk Committee		Appoint	✓				
52	Trustees <i>(co-opted only)</i> <i>*see Members' section re appointing other trustees (front page)</i>		Appoint/remove	✓				
GOVERNANCE: FUNCTION								
53	Annual Report on Trust Performance		Submit to members & publish on website <i>(annually)</i>	✓				
54	Articles of Association		Ensure compliance with	✓				
55	Code of Conduct for Trustees & Governors <i>(expectations)</i>		Set <i>(annually)</i>	✓				
56	DfE Reports and Returns Requirements		Delivery			✓		
			Ensure compliance	✓				
57	Freedom of Information Publication Scheme		Ensure in place			✓ ECM		
58	GDPR and Data Protection/Retention <i>(regulatory compliance)</i>	Trust	Ensure	✓	FAR			
		School	Monitor				✓	
59	Governance Arrangements, Meeting Attendance & Register of Interests	Trust Board	Ensure maintained & published on trust website	C		✓		
		LGC				✓	C	C

Function				Action	TB	COM	TL	LGC	HT
60	Governance Structure for the Trust <i>(ensuring transparency)</i>			Establish/review	✓				
61	Inspections	<i>Ofsted</i>		Ensure parents notified					✓
		<i>Ofsted & SIAMS (S48)</i>		Attend <i>(if/when required)</i>	✓		✓	✓	✓
				Ensure report shared with parents					✓
62	Risk Register <i>(managing risks to ensure the effective operation of the trust)</i>	<i>Trust</i>		Oversight of strategic risks across the trust	✓	FAR			
		<i>School</i>		Oversight of school-level risks <i>(at least termly)</i>				✓	C
63	Scheme of Delegation			Review <i>(2-yearly)</i>	✓		C	C	C
64	Terms of Reference	<i>Trust Board committees</i>		Review & approve <i>(annually)</i>	✓				
		<i>LGC</i>			✓				
65	Website Compliance	<i>Trust</i>		Monitor statutory compliance			✓		
		<i>School</i>						✓	
HUMAN RESOURCES									
66	Appeals: HR-related			Consider	At one level above the initial decision maker				
67	Appointments	<i>Central team</i>		Appoint			✓		
		<i>Trust Leader</i>		Appoint <i>(with Diocesan Corporate Member involvement & consent)</i>	✓				
		<i>Chief Finance Officer</i>		Appoint	✓		C		
		<i>Headteachers</i>	Appoint <i>(CofE with Diocesan Corporate Member involvement & consent)</i>	✓		C	C		
			Recommend appointment <i>(on behalf of recruitment panel)</i>			✓			
		<i>Senior leadership team</i>		Appoint			C	C	✓
		<i>Teachers and support staff</i>		Appoint <i>(in liaison with CFO/HR/ DoE if staffing costs are 'Amber High' or above)</i>			C		✓
68	Dismissal <i>(following a hearing process)</i>	<i>Trust Leader</i>		Dismiss	✓				
		<i>Headteacher</i>		Dismiss	✓		C	C	
		<i>Other staff (school)</i>	<i>Gross misconduct</i>	Dismiss	✓		C	C	C
			<i>Misconduct</i>				C	✓	C
			<i>Other (with equality implications)</i>		✓		C	C	
			<i>Other (with no equality implications)</i>				C	C	✓
		<i>Other staff</i>	<i>Gross misconduct</i>		✓		C		
<i>Misconduct</i>	✓				C				

Function				Action	TB	COM	TL	LGC	HT
		(central team)	Other (with equality implications)		✓		C		
			Other (with no equality implications)		C		✓		
69	Pay policy (including executive pay)			Approve	✓	FAR			
70	Performance Management		Policy & procedure	Approve and review	✓				
			Trust Leader	Ensure undertaken	✓				
			Headteacher/exec head/ head of school/school improvement leads)	Ensure undertaken			✓	C	
			Teachers	Ensure undertaken					✓
71	Salary Review Recommendations		Trust Leader	Approve	✓				
			Headteacher/exec head/ head of school/school improvement leads)	Approve	✓		C	C	
			Teachers	Approve				✓	C
72	Settlement Agreements			Approve (in accordance with DfE requirements)	✓		C	C	C
73	Staffing Contractual Changes		School	Consider and implement (in liaison with CFO/HR Manager/DoE)			C		✓
			Central team	Consider and implement (in liaison with CFO/HR Manager)			✓		
74	Staffing Structure		School	Approve structure developed by head			✓ DE&CFO	C	
			Central team	Approve structure	C		✓		
75	Suspension:		Trust Leader	Suspend & lift	✓				
				Lift	✓				
			Headteacher/exec head/ head of school	Suspend	C		✓	C	
				Lift	✓		C	C	
			All other staff (school)	Suspend			C	C	✓
				Lift			C	✓	C
			All other staff (central team)	Suspend	C		✓		
				Lift	C		✓		
76	Warnings/Final Warnings		School	Issue (outside of hearing process)			C		✓
			Central team	Issue (outside of hearing process)	C		✓		
77	Wellbeing, Workload & Working Conditions			Oversee	✓				

Function				Action	TB	COM	TL	LGC	HT			
SAFEGUARDING												
78	Designated Safeguarding Lead			School	Ensure appointed				✓			
Trust				✓								
79	Designated Teacher for Looked After Children			School	Ensure appointed				✓			
80	Disclosure & Disbarring Service Checks (DBS) & Section 128 Checks			Trust wide	Ensure carried out	✓						
School								✓				
81	Safeguarding		Audit	School	Ensure completed (<i>min annually</i>)			✓	✓	✓		
				Trust		✓						
			Child protection and safeguarding policy		Set & approve trust-wide policy	✓						
					Approve local version of policy					✓		
					Implement			✓			✓	
			Compliance	Trust	Oversight/monitor	✓						
				School	Oversight/monitor						✓	
			Training (<i>staff, volunteers, trustees, governors</i>)	Ensure completed/compliance (<i>at appropriate level</i>)	✓			✓		✓	✓	✓
82	Single Central Record			Trust	Monitor completion of SCR	✓						
School									✓			
VISION, ETHOS AND STRATEGY												
83	Admissions		Policy (<i>by 28 February</i>)		Set & Approve	✓						
			Appeals		Ensure in line with Appeals Code	✓						
			Deferred entry requests		Approve						✓	
			Delayed entry requests (<i>at normal points of entry</i>)		Approve					✓		
			Oversubscription of places		Approve allocation of places					✓		
84	Age Range Change			Consider, consult & propose	✓		C	C	C			
85	Business Continuity Plans			All	Develop/establish			✓				
				Trust	Monitor effectiveness	✓						
				School	Monitor effectiveness					✓		
86	Equality Information (<i>How schools comply with Public Sector Equality Duty</i>)			Trust	Ensure overall compliance with legislation	✓						
					Review equality objectives (<i>4-yearly</i>)		✓					
				School	Implement							✓
					Monitor						✓	
87	PAN (Published Admission Number) Change			School	Consider, consult & propose	✓		C	C	C		

Function			Action	TB	COM	TL	LGC	HT
88	Policies (<i>Delegation of Policies Schedule</i>)	Trust wide	Write			✓		
			Approve (<i>board or TL, according to policy schedule</i>)	✓		✓		
			Implement					✓
			Monitor	✓				
			Publish online (<i>as required</i>)			✓		
		School level	Write					✓
			Approve (<i>LGC or head, according to policy schedule</i>)				✓	✓
			Implement					✓
			Monitor				✓	
			Publish online (<i>as required</i>)					✓
89	School Day Length & Structure (<i>non-statutory expectation to be 32.5 hrs pw from September 2024</i>)		Propose			C	C	✓
			Approve				✓	
90	School Uniform Arrangements (<i>following DfE statutory guidance on cost of school uniform</i>)		Review & Approve				✓	
91	Stakeholder Engagement (<i>annual survey of staff, pupils, and parents</i>)		Ensure completed			C	✓	C
			Review				✓	
92	Strategic Plan and Key Priorities (<i>fostering Equality, Diversity & Inclusion and considering wellbeing & workload</i>)	Trust	Set	✓		C		
			Communicate			✓		
			Review progress	✓				
		School	Set			C	✓	C
			Communicate					✓
			Review progress				✓	
93	Term Dates		Set & approve			C	C	✓
94	Values and Positive Culture (<i>including promotion of fundamental British values</i>)	Trust	Set	✓		C		
			Communicate			✓		
		School	Set			C	✓	C
			Communicate					✓
95	Vision	Trust	Set	✓		C		
			Communicate			✓		
		School	Set			C	✓	C
			Communicate					✓
96	Whistleblowing Procedures		Set	✓				
			Publish on trust's website			✓		