



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 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	

2.	Governance	Decision Level					Notes
		Members	Trust Board	CEO ¹ CFO ²	LGB	Head teacher	
2.1	To draw up governance constitution and any amendments thereafter	-	I	-	A/R	-	LGB responsibility. MAT consultation to ensure consistency and compliance with MAT Articles, MFA and strategy, and academy SFA.
2.2	To appoint (and remove) the chair of the LGB	-	I	-	A/R	-	MAT will only be involved if there is a serious LGB leadership issue.
2.3	To appoint and dismiss the clerk to the LGB	-	-	-	A/R	-	Until role is centralised
2.4	To hold a full LGB meeting at least three times in an academy year, or a meeting of the temporary LGB as often may require	-	M	-	A/R	-	
2.5	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 requirements.
2.6	To set up a Register of members business interests	-	-	-	A/R	-	Documented through GovernorHub
2.7	To discharge duties in respect of pupils with special needs by appointing a "responsible person"	-	-	-	A	R	
2.8	To consider whether or not to exercise delegation of functions to individuals	-	M	-	A/R	-	
2.9	To regulate the LGB procedures and processes (where not set out in law)	-	A	-	R	-	
2.10	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.
2.11	To ensure academy website compliance with statutory requirements	-	M	-	A	R	
2.12	To ensure governance oversight of Board, LGBs and staff compliance with statutory and MAT requirements	-	A/ M	-	A	-	LGB or Board responsible for its own level. MAT will monitor compliance.
2.13	To consider requests from other academies to join the Trust	-	A/R	C	-	-	

3.	Procurement and Finance	Decision Level					Notes
		Members	Trust Board	CEO ¹ CFO ²	LGB	Head teacher	
3.1	To determine the scope of mandatory core and non-core services to be delivered by the Trust on behalf of its academies	-	A/R	-	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.
3.2	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)
3.3	To ensure centrally procured services provide value for money	-	A	R	-	-	
3.4	To be aware of all legal claims and ensure appropriate insurance is in place in respect of legal claims	-	A	R	-	-	
3.5	To approve collaboration and partnering arrangements	-	A/R	-	-	-	
3.6	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.
3.7	To develop and propose the individual academy budget	-	-	A ²	R	I	As 2.1
3.8	To approve the first formal budget plan each financial year	-	A/R*	-	-	-	
3.9	To monitor monthly expenditure	-	M*	-	R*	C	
3.10	To monitor half-termly expenditure and forecasts	-	M*	-	R*	C	
3.11	To approve any change between budget headings and/or likely budget overspends	-	-	C ²	R*	C	
3.12	To establish financial decision levels and limits	-	A/R*	-	-	-	In line with Trust Finance Policy
3.13	To establish a charging and remissions policy	-	-	-	A/R	C	
3.14	To appoint the Responsible Officer	A	R	I	-	-	
3.15	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 3.1/3.3 for contract determination.

4.	Employment and Performance Management	Decision Level					Notes
		Members	Trust Board	CEO ¹ CFO ²	LGB	Head teacher	
4.1	Approval of requests for additional staff	-	-	A/R	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 appointments	-	A(a)	R a/b	A/R (b)	-	(a) MAT will approve the appointment process, advise LGB of MAT requirements for and provide one Board member (normally CEO) as a full member of the appointment panel. (b) LGB will form the majority of the appointment panel, normally led by LGB Chair. CoFE academies have additional diocesan requirements .
4.3	Deputy appointments	-	-	C	R	R	MAT has no direct involvement unless invited to support by LGB or 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)	-	-	C	C	R	CEO to approve all vacancy recruitments for teachers and other senior staff prior to advertising to ensure budget sustainability.
4.7	Agree a pay policy	-	A/ R*	-	-	-	
4.8	Pay discretions	-	-	-	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	-	
4.11	To develop the academy workforce development plans	-	-	C	A	R	
4.12	To approve the academy workforce development plans	-	R	-	-	-	

	Employment and Performance Management <i>continued</i>	Decision Level					Notes
		Members	Trust Board	CEO¹ CFO²	LGB	Head teacher	
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	-	-	R	A/R	-	HT performance review to be undertaken in 4 stages: <ul style="list-style-type: none"> • Stage 1: CEO (as external assessor) reviews last 12 months performance and agrees draft objectives for next 12 months with HT. • Stage 2: CEO presents outcomes/proposals to two LGB trained appraisal governors. • Stage 3: Final outcomes and proposals agreed with HT. • Stage 4: LGB appraisal governors propose any performance-related pay increase for full LGB approval.

5.	Curriculum	Decision Level					Notes
		Members	Trust Board	CEO ¹ CFO ²	LGB	Head teacher	
5.13	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.
5.14	Accountability for standards of teaching	-	I	C ¹ M ¹	A	R	
5.15	Responsibility for individual child's education	-	I	C ¹ M ¹	A	R	
5.16	Accountability for individual child's overall development.	-	I	C ¹ M ¹	A	R	
5.17	Approval of a collective worship policy	-	-	-	A/R	-	

6. Policies							
6.13	To determine, on an annual basis, those policies which will be developed by the Trust and mandatory for all academies	-	A/R	-	-	-	
6.14	To provide, on an annual basis, links to all policies and procedures and a schedule for their review	-	R Trust	-	R Acad	-	
6.15	Accountability for ensuring policies and procedures is being complied with	-	M	-	M	-	

7. Safeguarding							
7.13	To approve a safeguarding policy	-	A/R	-	I	I	

8. Target Setting							
8.13	To approve targets for pupil achievement	-	-	C ¹	A	R	Annual approval by LGBs
8.14	Accountability for pupil outcomes	-	-	M ¹	M	A	Direct accountability with headteacher. LGB and CEO monitor HT performance.
8.15	To approve a discipline policy	-	A/R	-	I	I	

		Decision Level					Notes
		Members	Trust Board	CEO ¹ CFO ²	LGB	Head teacher	
9. Premises and Health & Safety							
9.13	Buildings insurance and personal liability	-	A	R ²	-	-	
9.14	Developing academy buildings strategy or master plan	-	A/R ²	-	C	C	LGB propose academy plans. MAT Board approve plans.
9.15	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.
9.16	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.
9.17	To ensure that health and safety regulations are followed	-	-	M	A	R	
10. Academy organisation							
10.1	To publish proposals to change MAT category of academy	-	A/R	-	C	-	
10.2	To set the times of academy sessions	-	-	-	A	R	
10.3	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.
10.4	To ensure that the academy meets for 380 sessions in an academy year	-	-	M	A	R	

	Decision Level					Notes
	Members	Trust Board	CEO ¹ CFO ²	LGB	Head teacher	

11. Parent Engagement							
11.1	To prepare and publish the academy prospectus	-	-	-	A/R	C	
11.2	To ensure provision of free academy meals to those pupils meeting the criteria	-	-	C ¹	M	A/R	
11.3	Adoption and review of home-academy agreements		-	C ¹	M	A/R	

12. Admissions							
12.1	To produce an admissions policy	-	-	-	A/R	-	Admissions Policy takes account of local circumstances
12.2	To approve an admissions policy	-	-	C	R	-	Approved by LGB with overview by CEO for MAT-wide consistency.