

Effective Date: 1 September 2024

Approved by Trust Board: 18 July 2024

The following descriptors are used in this document to describe the roles of various groups:

Accountable (A)	Ultimately answerable for the identified task. Delegates to those responsible. Only one group can be accountable.
Responsible (R)	Carries out the work required to deliver the task. Rarely shared between multiple groups.
Support (S)	Where appropriate, is involved during decision making or when a task is being undertaken. Take advantage of specialist knowledge. Multiple groups possible.
Inform (I)	Kept informed of progress. Multiple groups possible.
Monitor (M)	Monitors activity or area of responsibility. Multiple groups possible.

References to CEO includes members of the executive team to whom responsibility may be delegated by the CEO.

Areas of responsibility reserved for Trust members:

- Appoint and remove members.
- Appoint and remove non-coopted trustees.
- Appoint external auditors.
- Agree and review Articles of Association.

Any activity or responsibility not specifically included in this list of delegations remains the responsibility of the CEO in collaboration with the Trust Board, where appropriate.

Any updates to statutory guidance and Trust policies issued between reviews of this document will take precedence over the delegations listed in the current iteration of this document.

Following consultation, the Trust board reserves the right to amend delegations as deemed necessary.

 = included in Stone King/CST scheme of delegation checklist (April 2024) as a statutory requirement

Area of Responsibility		TB	CEO	LGB	HT
1. Governance					
Strategy					
1.1	Set trust vision, strategy, culture and values.	A	R	S	S
1.2	In the context of the Trust's vision and strategy, determine school vision and strategy.	M	S	R	A
1.3	Champion the Trust strategy.	A	R	S	S
1.4	In Church schools, uphold the Christian distinctiveness of the school.	A	S	S	R

Area of Responsibility		TB	CEO	LGB	HT
1.5	In community schools, embed school vision and implement values.	A	S	S	R
1.6	Set Trust development plan in line with Trust vision and strategy.	A	R	I	S
1.7	Review strategy and deliver Trust development plan priorities.	M	A R	I	S
1.8	Set school development plan in line with Trust priorities and school vision and strategy.		A S	S	R
1.9	Deliver school improvement plan priorities.		A	M	R
1.10	Agree central spend and central charge.	A	R	S	S
1.11	Set Trust-wide policies in relation to safeguarding children and young people in line with statutory requirements and monitor its effectiveness.	A	R	I	S
1.12	Ensure Trust-wide policies in relation to safeguarding children and young people are reflected in school procedures and practice and monitor effectiveness.	A	M	M	R
1.13	Appoint designated safeguarding lead (DSL) at each school in line with statutory guidance.	A	R	I	R
1.14	Monitor effectiveness and compliance of DSL in respect of practice.	I	A	S	R
1.15	Review individual school admissions policy periodically to ensure it complies with the vision and strategy of the school, making recommendations for amendment to the Trust Board where required.	I	S	R	A
1.16	Review admissions policies for all Trust schools periodically to ensure they comply with the vision and strategy of the Trust, and meet legislative requirements, making recommendations for amendment to the Trust Board where required.	A	R	I	S
1.17	Develop and approve applications for significant change to school status and PAN.	A	R	S	S
1.18	Maintain, monitor and report in respect of strategic risk register in accordance with Trust Risk Management Policy.	A	R	I	S
1.19	Review and approve strategic risk register at least twice each year.	A R	I	I	I
1.20	Maintain, monitor and report in respect of school risk register in accordance with Trust Risk Management Policy.	A	S	S M	R
1.21	Trust level engagement with stakeholders including parents and religious authorities.	A	R	S	S
1.22	School level engagement with stakeholders including parents.	A	S	S	R
1.23	Consider requests from other schools to join the Trust.	A	R	I	S
1.24	Set the times of school sessions, training days and the dates of school terms and holidays.	A	R	I	S
Policy and Compliance					
1.25	Determine and approve trust-wide policies which reflect the Trust's ethos and values in accordance with the Trust's schedule of policies.	A	R	I	S
1.26	Determine and approve school-level policies which reflect the school's ethos and values in accordance with the Trust's schedule of policies.		A	S	R
1.27	Comply with all Trust policies.	A	R	M	R
1.28	Comply with all school-level policies.		A	M	R

Area of Responsibility		TB		CEO	LGB	HT	
1.29	Approve school admissions policies.	A	R	S	S	S	
1.30	Set whistleblowing procedures.	A		R	I	S	
1.31	Ensure compliance with all relevant statutory legislation not otherwise specified in this Scheme of Delegation.	A		R	M	S	
1.32	Agree auditing and reporting arrangements for all matters of compliance.	A		R	S	S	
1.33	Operational responsibility for matters of non-statutory policy compliance unless otherwise provided for in this Scheme of Delegation.			A	R	M	R
1.34	Approve audited annual report and accounts.	A	R	S			
1.35	Submit to ESFA and publish audited annual report and accounts.	A		R			
1.36	Establish and publish register of all interests, business, pecuniary, for members/ trustees/ committee members.	A		R	S	S	
1.37	Carry out all statutory employment checks including DBS checks.	A		R	M	S	
1.38	Ensure compliance with Trust Complaints Policy.	M	A	R	S	S	
1.39	Manage and support hearings relating to permanent exclusions, admissions, complaints, grievance, disciplinary.	I	A	R	S	S	
1.40	Ensure Trust website is maintained and compliant with statutory requirements and DfE/ESFA expectations.	A		R		S	
1.41	Ensure school website is maintained and compliant with statutory requirements and DfE/ESFA expectations.	A		M	M	R	
1.42	Ensure compliance with GDPR including the appointment of a DPO.	A		R	M	S	
1.43	Ensure all statutory duties in respect of equality, diversity and inclusion (EDI) are undertaken.	A		R	M	R	
1.44	Monitor school plans and policies linked to EDI and check that these are being well implemented.			A	S	M	R
1.45	Ensure school uniform policy is compliant with statutory guidance.			A	M	R	
Robust Governance							
1.46	Elect Chair and Vice Chair of Trust board.	A	R	S	I	I	
1.47	Set expectations for trustee conduct.	A		R			
1.48	Foster equality, diversity and inclusion including building a diverse board.	A		R	S	S	
1.49	Ensure transparency of information.	A		R	S	S	
1.50	Adhere to the Articles of Association	A		R	S	S	
1.51	Appoint link trustees for safeguarding, SEND/inclusion and careers (secondary only).	A	R	S	I	I	
1.52	Establish and appoint to board committees.	A	R	S	I	I	
1.53	Appoint and remove co-opted trustees.	A	R	S	I	I	
1.54	Appoint and remove the Trust board Governance Professional.	A	R	S	I	I	
1.55	Ensure appropriate finance skill set on Trust board.	A	R	S			
1.56	Periodically review performance of Chair of Trustees.	A	R	S	S		
1.57	Complete annual self-review of trust board and committee performance, to include trustee contribution and succession planning for the Board and central team.	A	R	S	S	S	

Area of Responsibility		TB		CEO	LGB	HT
1.58	Determine the development needs of trustees by the completion of skills audits.	A	R	S		
1.59	Establish a high performing governance structure and annually review the governance function.	A	R	S	S	S
1.60	Annually review and approve terms of reference for all Trust committees.	A	R	S	I	I
1.61	Agree annual schedule of business for Trust board and LGBs.	A	S	R	S	S
1.62	Consider whether to exercise delegation of functions to individuals.	A		R	I	I
1.63	Ensure effectiveness of LGBs and maintain two-way channels of communication.	A		R	S	M
1.64	Appoint board committees including local governing bodies.	A		S	R	S
1.65	Appoint and remove the Chair of the LGB.	A	R	S	S	S
1.66	Appoint parent trustees/LGB parent governors.	A	R	S	S	R
1.67	Approve appointment and remove non-elected members of the LGB.	A	R	S	S	S
1.68	Appoint and dismiss the Governance Professional to the LGB.			A	S	R
1.69	Appoint link governors for safeguarding, SEND, inclusion and wellbeing.			A	R	S
1.70	Complete annual self-review of LGB performance, to include governor contribution for the LGB and school staff.			A	R	S
1.71	Determine the development needs of governors by the completion of skills audits.			A	R	S
1.72	Hold a full LGB meeting at least four times in a school year, or a meeting of the temporary governing body as often as may be required.	A		R	S	S

Area of Responsibility		TB		CEO	LGB	HT
2. Finance						
2.1	Develop and propose budget plan to support delivery of key Trust priorities.	A		R	S	S
2.2	Approve budget plan to support delivery of key Trust priorities.	A		R	I	S
2.3	Develop and propose school budgets.			A	S	R
2.4	Approve school budgets.	A		R	I	S
2.5	Set delegated authority limits for financial transactions, as set out in the Finance Policy.	A		R	I	I
2.6	Establish controls framework including internal audit.	A		R	I	S
2.7	Appoint external auditors.	A ¹		R		
2.8	Deliver annual report and accounts with regard to accounts consolidation exercises required by the DfE.	A		R		
2.9	Monitor monthly expenditure and deliver monthly management accounts and forecasts.	A	M	R	M	S
2.10	Ensure adequate insurance cover is in place including relevant approvals on indemnities.	A		R	S	S
2.11	Ensure compliance with all ESFA requirements.	A		R	S	S

¹ Trust Members are accountable for appointing external auditors.

Area of Responsibility		TB	CEO	LGB	HT
2.12	Develop finance policies including charging and remission and procurement.	A	R	I	I
2.13	Manage conflicts of interests and related party transactions.	A	R	S	S
2.14	Manage cash positions.	A	R	M	S
2.15	Monitor pupil premium spend.	A	M	M	R
2.16	Enter into contracts (in accordance with the Finance Policy) up to the limits of delegation and within an agreed budget.	M	A	M	R
2.17	Make payments within agreed financial limits as set out in the Finance Policy.	M	A	M	R

Area of Responsibility		TB	CEO	LGB	HT
3. Curriculum and Learning					
3.1	Strategic oversight and accountability.	A	R	M	S
3.2	Hold CEO to account for standards of educational provision	A	R	I	S
3.3	Set Trust approach to curriculum and assessment with regard to statutory requirements.	A	R	I	S
3.4	Set and deliver school curriculum and assessment in line with agreed Trust principles.	A	M	M	R
3.5	Produce and analyse data.	M	A	M	R
3.6	Set Trust behaviour and welfare policies with regard to statutory requirements.	A	R	S	S
3.7	Set and deliver school behaviour and welfare policies in line with agreed Trust principles and policy schedule.	A	S	S	R
3.8	Deliver careers guidance with regard to statutory requirements.	A	S	M	R
3.9	Ensure compliance with SEND Code of Practice.	A	R	M	R
3.10	Set approach to directing pupils offsite and exclusions. ²	A	S	M	R
3.11	Keep admission and attendance registers in line with statutory requirements.	A	S	M	R
3.12	Delivering support for looked after children.	A	S	M	R
3.13	Attending external inspections.	A	R	S	R
3.14	Deliver Early Years Foundation Stage (EYFS) in line with statutory requirements.	A	M	M	R
3.15	Develop statutory curriculum policies as required by school (RSE, collective worship, RE).	A	M	M	R
3.16	Operational responsibility for educational provision in line with Trust and school vision and development plans.		A	M	R
3.17	Ensure compliance in respect of DfE pupil attendance legislation.	A	S	M	R
3.18	Ensure good practice in relation to pupil attendance management and its effectiveness.	M	A	M	S

Area of Responsibility		TB	CEO	LGB	HT
4. HR and Operations					
HR					
4.1	Appoint senior executive leader as Accounting Officer.	A	R	I	I
4.2	Appoint Chief Financial Officer.	A	R	I	I

² Only the headteacher has the power to exclude a pupil.

Area of Responsibility		TB		CEO		LGB		HT	
4.3	Oversee staff wellbeing, workload and working conditions.	A		R		M		S	
4.4	Appoint and dismiss CEO.	A	R			I		I	
4.5	Implement disciplinary and capability procedures in respect of CEO.	A	R						
4.6	Appoint central Trust staff (including ELT).	S		A	R	I		S	
4.7	Implement disciplinary and capability procedures in respect of central Trust staff.	S	I	A	R				
4.8	Suspend/end suspension/dismiss central Trust staff other than CEO.	I		A	R				
4.9	Appoint and dismiss Headteacher.	A	R	S		S			
4.10	Implement disciplinary and capability procedures in respect of the Headteacher.	A		R		S	I		
4.11	Suspend/end suspension of Headteacher.	A		R		S			
4.12	Appoint teachers other than Headteacher, including Deputy Headteacher.			A	S	S		R	
4.13	Appoint school non-teaching staff.			A	S	I		R	
4.14	Implement disciplinary and capability procedures in respect of all school staff other than the Headteacher.			A	S	S	I	R	
4.15	Suspend/end suspension/dismiss school staff other than Headteacher.			A	R	S		S	
4.16	Set approach to staff appointments and dismissal with regard to statutory requirements.	A		R		I		I	
4.17	Set approach to appraisal and performance management.	A		R		S		S	
4.18	Set pay levels, including executive pay.	A		R		I		I	
4.19	Set HR policies.	A		R		I		S	
4.20	Agree CEO pay award.	A	R						
4.21	Agree Headteacher pay award.	A	R	S		S			
4.22	Consider and approve pay discretions.	A	R	S		I		I	
4.23	Determine dismissal payments/early retirement.	A	R	S		S		S	
4.24	Undertake performance management of the CEO.	A	R						
4.25	Undertake performance management of the Headteacher.	I		A	R	S			
4.26	Undertake staff appraisal procedure and pay progression.	I		A		M		R	
4.27	Agree central trust staff appraisal outcome and pay progression.	A	S	R					
4.28	Agree school staffing structure.			A	S	S		R	
4.29	Agree central Trust staffing structure.	S		A	R	I		I	
4.30	Agree and implement redundancy/restructure processes.	A	S	R		S		S	
Operations									
4.31	Maintain school buildings in accordance with approved estates management strategy.	A		S		M		R	
4.32	Set health and safety policies	A		R		I		S	
4.33	Set estates management strategy.	A		R		S		S	
4.34	Develop and implement premises management plans, including annual maintenance.	A		S		M		R	
4.35	Ensure health and safety regulations are followed to include regular audits.	A		S		M		R	

Area of Responsibility		TB	CEO	LGB		HT
4.36	Responsibility for extended services on site (school lettings, out of hours clubs etc).	A	M	M	S	R