



Good Shepherd Trust
life in all its fullness

Scheme of Delegation

Document Control	
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Full Review	March 2022
Date of Next Review	December 2025

Values

In keeping with our Trust vision, every member of the Trust family of schools will be valued and encouraged to fulfil their potential. In our Trust we believe:

- Everyone has something to offer
- Trust, honesty, empathy and social responsibility are the Christian values that frame our work
- We are here for the whole person, spiritually, morally, educationally and socially
- In working with transparency and openness

Policy Framework

The Good Shepherd Trust welcomes schools that wish to join a Diocesan led Multi Academy Trust or may be required to join an academy trust.

The object of the Trust is to advance for the public benefit education in the UK, establishing, maintaining, carrying on, managing and developing schools providing high quality education to pupils from all backgrounds. The Trust offers a broad and balanced curriculum and fosters collaboration across our family of schools, in line with the Trust's vision and values.

The Scheme of Delegation is a key governance document showing how accountability and decision-making works within the Trust. It is important that all schools joining the Trust take time to understand the Scheme of Delegation so that they are clear about the approach to local governance and which functions are delegated.

Our Scheme of Delegation reflects the Trust's ethos by promoting a positive culture of honesty, transparency, and accountability for the benefit of all stakeholders. It ensures the Trust's leadership at all levels is clear about which decisions the Trust Board retains, and the extent of executive powers.

This Scheme of Delegation is not to be confused with the Delegated Authorities of the financial powers referred to in the DfE's Academy Trust Handbook.

Each school within the Trust is governed by the Good Shepherd Trust's board of Directors however, this does not mean that the Board makes all decisions. The Trust recognises and values the benefits of a Local Governance structure that partners local skills, knowledge and commitment with the strategic overview of the Trust board and the Trust's central staff team. As such the board chooses to delegate powers to the CEO, to committees of the Board including Local Governing Bodies and to the central Trust team.

Abbreviations

The Scheme of Delegation should be read in conjunction with other Trust policies and procedures including:

- LGB Manual
- Trust Finance Handbook
- Health and Safety Policy
- Data Protection Policy
- Articles of Association
- Child Protection Policy
- Overarching Safeguarding Policy
- Asset Management Procedure
- Online Safety Policy (including cyber security)

Governance Structure

Your Governance Structure

This scheme of delegation sets out the agreement of responsibilities between the school and its Local Governing Body and the Good Shepherd Trust.

As a former Voluntary Aided/Voluntary Controlled/Community School/Standalone Academy the Local Governing Body will reflect the following composition (*delete as appropriate*):

Former Voluntary Aided (VA) School

Minimum size of the local governing body is **ten** (or eight where foundation members are also parent members), due to the need for foundation members to outnumber the rest of the members by two:

- two parent members
- the headteacher/executive headteacher
- one staff member
- 6 foundation members including the officiating minister

Former Voluntary Controlled (VC) School

Suggested size of the local governing body is **five - seven**. No more than 25% foundation members:

- two parent members
- the headteacher/executive headteacher
- one staff member
- one foundation member

Former Community School

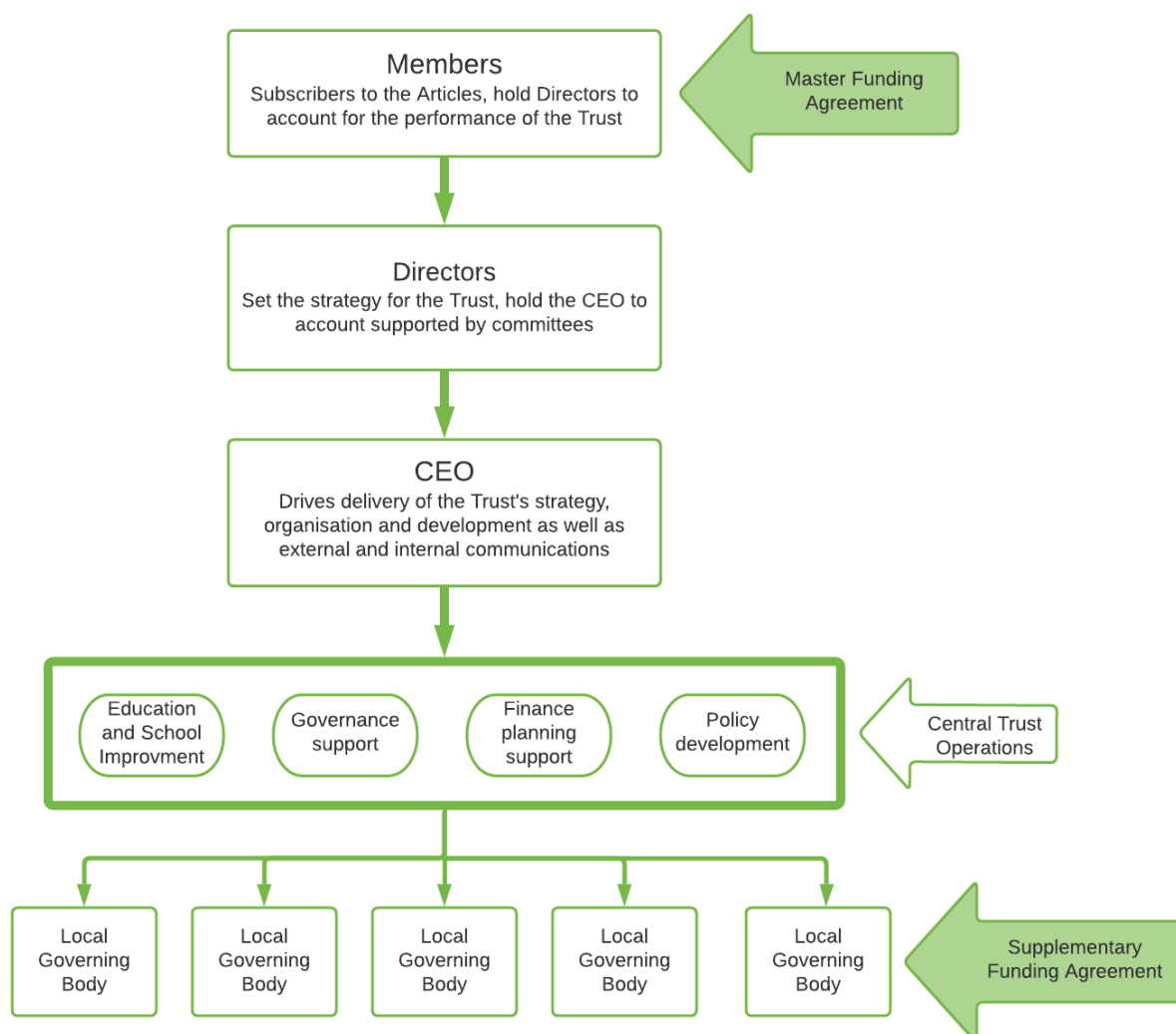
Suggested size of the local governing body is **five - seven**.

- two parent members
- the headteacher/executive headteacher
- one staff member
- one community member

Former Standalone Academy

This will reflect the status of the school pre-academisation and should therefore reflect one of the three categories above.

Responsibilities Flowchart



The Trust has a Board of Directors of up to 12 people, up to 3 of whom shall be appointed by members of the Trust, from the Chairs of Local Governing Bodies. Further information on this can be found in the Trust's Governance Manual.

The Directors shall ensure that any Local Governing Body shall include at least 2 elected representatives of the parents of pupils attending the relevant Academy.

101A, from Articles of Association, 2014

Therefore, each Local Governing Body has two Parent members within its structure. In order that the former and special characteristics of each school are maintained on joining the Trust, the makeup of the Local Governing Body will reflect the existing governance structure as closely as possible.

Trust Wide Responsibilities of the Board of Directors

The Good Shepherd Trust is the legal entity. The board of directors is accountable in law for all decisions and the performance of its schools to the Secretary of State for

Education. Therefore, the directors have overall responsibility and ultimate decision-making authority for all the work of the Trust. This is exercised through strategic planning and the setting of policy and is managed through business planning, monitoring of budgets, performance management, the setting of standards and the implementation of quality management processes. Each school (without an LGB Chair on the Board) will have a designated 'link' director who will visit and engage with them.

The Trust Board will have the same powers over all schools that join the Trust, irrespective of their performance and capacity. This does not mean that the Board makes all the decisions as such and may choose to delegate to the CEO, board committees and local governing bodies. Without formal delegation the individual or committee has no power to act. The implementation of the Scheme of Delegation enables the benefits of local skills, knowledge, autonomy and commitment to be utilised to support and challenge those who work within each school to ensure the best outcomes for its children and young people.

The flexible Scheme of Delegation will offer greater delegation to outstanding and good converters than to sponsored schools. The model therefore incorporates several safeguards to ensure the Trust, as sponsor, retains sufficient control to meet its obligations to the DfE, not dissimilar to current powers of local authority or indeed the Secretary of State's intervention powers in academies:

The Trust has appropriate powers to act if a school gets into difficulties or if they take actions that may:

- jeopardise the distinctiveness of its Christian education in the case of Church schools; and/or
- undermine its academic performance
- place it in financial jeopardy
- otherwise undermine the reputation or sustainability of the school or the Trust.

The Trust has the power to:

- make further appointments to the Local Governing Body
- revoke existing appointments
- move a school to a different category in the flexible Scheme of Delegation.

The Trust may also instruct a Local Governing Body to take appropriate remedial action if the school fails to maintain its premises properly. It should be remembered that although decisions may be delegated, the LGB members, together with the Trust Board Directors, remain responsible for any decision made under delegation.

Each of our schools will have its own distinctive statement of its vision and values but collectively we value:

- trustworthiness, honesty, and openness,
- humility, empathy and forgiveness,
- social responsibility, good stewardship, and sacrificial service.

Interactions with Local Governing Bodies will be underpinned by these values.

Categories of Support

Supporting

A Good or Outstanding School whom the Directors feel are competent with the highest degree of delegation. Supporting schools are the 'powerhouse' to delivering improvement within the Trust in conjunction with its partners including the Diocesan family of schools, teaching school hub alliance and Local Area System Leaders (LASL). The following provisions will apply to them under the flexible Scheme of Delegation:

- the Local Governing Body of each Supporting school can be carried over on an 'as is' basis as far as the standard academy documentation normally allows,
- it is intended that Supporting schools will be autonomous with most powers delegated to their Local Governing Bodies, subject to them remaining outstanding or good,
- should a Supporting school fail to retain its outstanding or good status or be in danger of doing so it may drop down into a lower category within the Scheme of Delegation. This decision will not be based simply on the Ofsted outcomes but together we will consider the individual circumstances of the school.

Supported

A School judged to require improvement. The flexible scheme of delegation will be adapted to suit the needs of the school, its strategic development goals and with consideration for local circumstances. The objective will be to provide ongoing support to help progress toward Good and Outstanding.

The following provisions will apply under the flexible Scheme of Delegation:

- the Trust will retain appropriate functions in the Scheme of Delegation to ensure Local Governing Bodies receive the support they require to deliver school improvement,
- a Supported school may move to a different category depending on its performance,
- to reflect the new category in which the Supported school is placed adjustments could then be made to:
 - the make-up of the Local Governing Body,
 - the powers delegated to the Local Governing Body,
 - the budget 'set aside' for school improvements.

Sponsored

A Sponsored school will usually have been judged Inadequate and will receive the highest level of intervention and support from the Trust.

The following provisions will apply to them under the flexible Scheme of Delegation:

- the Trust has the power to select all the members of the Local Governing Body, other than parental and staff representatives
- a Sponsored school will have fewer powers delegated to it.
- a Sponsored school which improves its performance will have greater delegated powers by:
 - the increase of powers delegated to it; and
 - appropriate budgetary adjustments.

Assigning the Category

The following procedures govern the category assigned to each school under the flexible Scheme of Delegation:

- The Trust officers will consult with the school and act in good faith when it decides which broad category it should be placed in or moved to
- normally, the starting point will be the appropriate category corresponding to the school's most recent Ofsted report and the assessment taken through due diligence before the school joins the Trust
- however, the Trust Board may agree to assign a different category to the school, or to
- amend the delegation of specific items if circumstances should warrant this, for example outcomes from SIAMS inspection or consideration of local circumstances the school finds itself in
- The Trust Board on the advice of the CEO will review which category is appropriate for the school on at least an annual basis. The annual review will normally be undertaken at the end of the Autumn or early Spring term and is an opportunity for schools to give constructive feedback about the operations of the central Trust team, new areas for development and delivery as well as reviewing the individual areas of responsibility outlined in the Scheme of Delegation.

Roles within the Scheme of Delegation

This scheme of delegation ensures that Members, Directors, our CEO and Central team, School LGB's and Senior Leaders are clear about who has responsibility for making which decisions in the Trust. It establishes who makes which decisions and ensures this is clear to all. It clearly demonstrates the lines of accountability.

Role	Description
Members	Members appoint the Directors. Membership is described in the Trust's Articles of Association
Directors	The Trust board is accountable in law for all decisions about its schools and is accountable to the Secretary of State for Education for the performance of each Academy within the Trust.
LGB	Local Governing Bodies The local governing body is a standing committee of the Trust which has delegated powers to oversee the running of its individual school. The LGB may choose to delegate some of these powers to smaller committees or the Headteacher as it deems fit to fulfil its responsibilities. Where the document refers to the LGB this might be through some committees or further delegation but with the understanding that the ultimate responsibility remains with the LGB.
CEO	Chief Executive Officer A significant number of responsibilities under the scheme of delegation lie with the CEO. It is recognised that the CEO may choose to delegate some of their duties to the Chief Finance Officer and School Improvement Consultants and other staff in their team.
Central Team	Business Manager, Finance Support Officers, School Improvement Consultants, Admin Support Officers and Development Officer Any other staff appropriate to the responsibility or task.
SLT	Senior Leadership Team Headteacher/Executive Headteacher or Head of School as appropriate to the individual school senior leadership structure and as delegated by the LGB or the Executive Headteacher.

Glossary Table of Responsibilities

In line with best practice, delegations are defined by activity rather than by simply 'ticking'

Responsibility	Description
Approve	<p>Approves the decision or activity. Accountable for making sure the activity is satisfactory and meets performance standards. May delegate work (Perform).</p> <p>There must be only one Approve body specified for each task.</p> <p><i>Make the decision</i></p>
Advise	<p>The individual/group that should advise and make recommendations on strategy or how a particular task should be completed.</p> <p>This role describes those whose knowledge and expertise is important in making the decision but does not imply that their input will be followed in all circumstances.</p> <p><i>Consulted / Evidence gathering</i></p>
Implement	<p>The individual/group that has responsibility for undertaking the task delegated to them, they will follow agreed policies and procedures or carry out specified duties. They are accountable for implementing or executing decisions or policies and may be required to report on progress to other groups.</p> <p><i>Ensure action is in place</i></p>
Review	<p>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.</p> <p>In some instances, it may be that the individual/group will observe and gain an appropriate level of understanding of a particular task or issue, reporting to other groups as necessary.</p> <p><i>Provide feedback and monitoring</i></p>
Perform	<p>The individual/group that has primary responsibility for ensuring the task is completed.</p> <p>They may be required to report on the delivery of duties/action.</p> <p><i>Do the work</i></p>

Commonly Used Abbreviations

These are commonly used acronyms across the Trust. Not all of these will appear in the Scheme of Delegation.

Abbreviations

AMP Asset Management Plan	ASP Analyse School Performance	DFC Devolved Formula Capital	EAL English as an Additional Language
EHCP Education, Health and Care Plan	EYFS Early Years Foundation Stage	FSM Free School Meals	GA General Adviser
GLD Good Level of Development	HLTA Higher Level Teaching Assistant	KS Key Stage	LA Local Authority
LASL Local Area System Leadership	LCVAP Locally Co-ordinated Voluntary Aided Programme	NLE National Leader in Education	NOR Number on Roll
NPQH National Professional Qualification for Headship	PAN Published Admissions Number	PP Pupil Premium	PPG Pupil Premium Grant
RSHE Relationships, Sex and Health Education	SDP School Development Plan	SEF Self-Evaluation Framework	SEN(D) Special Educational Needs and Disabilities
SENDCo Special Educational Needs and Disabilities Co-ordinator	SIAMS Statutory Inspection of Anglican and Methodist Schools	SIMS School Information Management System	SIP School Improvement Plan
SLT Senior Leadership Team	SSMG School Senior Management Group	STA Senior Teaching Assistant	TA Teaching Assistant
TLR Teaching and Learning Responsibility	TUPE Transfer of Undertakings (Protection of Employment)	UPS Upper Pay Scale	Y Year

1. Leadership and Governance			Members	Directors	CEO	Central Team	LGB	SLT	Support level notes
Operation of Trust Board	1.1.	Appointment of Directors who are LGB Chairs	Approve	Advise	Advise		Advise		
	1.2.	Appointment of other Directors		Advise	Advise				
Trust Policy and Procedures: Development	1.3.	To develop and establish the following policies in line with statutory requirements and best practice:		Approve	Review	Perform	Advise	Advise	
Trust Policy and Procedures: Setting	1.4.	<ul style="list-style-type: none"> Admissions Policy Complaints Policy and Procedures Charging & remissions Policy (pupil only) Whole School Behaviour Policy Health and Safety Policy Safeguarding incl Child Protection Policies Equality Policy Whistleblowing Policy Data Protection incl. Publication Scheme <p>Other policies and procedures are developed centrally by the Trust – please see the Trust website for all documents.</p>		Approve	Review	Perform	Implement	Implement	

1. Leadership and Governance			Members	Directors	CEO	Central Team	LGB	SLT	Support level notes
Trust Policy and Procedures: Monitoring	1.5.	To monitor the effectiveness of Trust based policies and procedures and ensure that they are reviewed in a timely manner		Approve	Review	Perform	Advise	Advise	
Risk Management Policy Development, Setting and Monitoring	1.6.	Development and setting of the Trust wide Risk Management Policy including setting risk tolerances and determining risk appetite		Approve	Advise Implement	Perform			
	1.7.	Set and monitor Trust wide Risks on the Risk Register		Approve Review	Implement Advise				
	1.8.	Set and monitor School specific Risks for each site's Risk Register		Review	Advise Review		Approve Perform	Advise	Supporting
				Approve	Advise Review		Perform	Advise	Supported Sponsored
School Policy and Procedures: Development	1.9.	To produce relevant school specific policies and strategies as required and to develop policies as delegated by the Trust			Advise		Approve	Perform	Supporting
				Approve	Advise		Advise	Perform	Supported Sponsored
School Policy + Procedures: Implementation and Delivery	1.10.	To deliver policies and procedures developed in school in day-to-day operations		Advise		Approve	Implement		
School Policy + Procedures: Monitoring	1.11.	To monitor the effectiveness of any school specific policies and strategies			Advise		Approve Review	Implement	Supporting
				Approve	Review		Advise	Implement	Supported Sponsored

1. Leadership and Governance			Members	Directors	CEO	Central Team	LGB	SLT	Support level notes
Performance Management of School Staff	1.12.	Undertake the appraisal and performance management, in accordance with Trust appraisal and pay policies of: a) Headteacher			Advise	Perform	Approve Perform		Supporting
				Approve	Advise	Perform	Advise Perform		Supported
	1.13.	b) Executive Head		Approve	Perform		Advise		Sponsored
	1.14.	c) Other staff		Review			Approve Perform		
Operations of the LGB	1.15.	To appoint (and remove) the chair of the LGB			Advise		Approve	Advise	Supporting
				Approve	Advise		Advise	Advise	Supported
	1.16.	Approval of all LGB appointments		Review	Approve		Advise		Sponsored
	1.17.	To appoint the clerk to the LGB and to nominate lead LGB members with responsibility for safeguarding and H&S		Review	Advise		Approve	Advise	
	1.18.	To ensure each LGB holds a full meeting at least three times in a school year.		Review	Review		Approve		
	1.19.	To ensure an accurate register of interests for LGB members is maintained and published as required				Review	Approve	Implement	
	1.20.	To discharge duties in respect of pupils with special needs by appointing a "responsible person"			Review		Approve	Advise	Supporting
				Approve	Review		Advise	Advise	Supported

1. Leadership and Governance			Members	Directors	CEO	Central Team	LGB	SLT	Support level notes
Operations of the LGB cont.	1.21.	Ensure Terms of Reference are available for the Trust's LGBs		Approve	Review	Perform	Advise		
	1.22.	To implement and monitor the LGBs operation within the Terms of Reference		Approve	Advise Review	Advise	Implement		
	1.23.	To complete an annual Self - evaluation of Local Governing Body using the Trust's 'LGB Health Check' document			Review Advise		Approve Perform	Advise	
	1.24.	To determine the development needs of LGB members			Review		Approve	Advise	
	1.25.	To develop and support an appropriate programme of LGB training to meet the needs of LGB members as identified		Advise	Implement	Perform	Approve	Advise	Supporting
				Approve	Implement	Perform		Advise	Supported
Admissions and Exclusions	1.26.	Manage the exclusions process in-line with Trust policy and procedures.			Advise	Advise	Approve Implement	Advise Perform	
	1.27.	Responsibility for consultation on changes to the overarching admissions policy.		Approve	Implement	Perform	Advise	Advise	
	1.28.	Approve written requests from LGB to make changes to individual school's Admissions Policy		Approve	Advise	Implement	Perform	Advise	
	1.29.	Reaching admissions application decisions					Approve	Implement	

1. Leadership and Governance			Members	Directors	CEO	Central Team	LGB	SLT	Support level notes
Admissions and Exclusions cont.	1.30.	Management of appeals procedures on behalf of LGB in-line with Trust policy and procedures		Approve	Implement				
	1.31.	Appeal against LA directions to admit pupil(s) – Always conducted with the support of the Central Trust.			Advise	Advise	Approve	Implement	Supporting
				Approve	Advise	Advise	Advise	Implement	Supported
Information for parents	1.32.	To maintain school website in accordance with statutory requirements and manage effective communications with key stakeholders (Trust & school)					Approve Implement	Perform	Supporting
				Approve	Advise	Advise	Implement	Perform	Supported
	1.33.	To ensure provision of free school meals to those pupils meeting the criteria					Review	Approve Perform	Sponsored
Miscellaneous	1.34.	To set the times of school sessions and the dates of school terms and holidays.					Approve	Implement	Supporting
				Approve			Advise	Implement	Supported
	1.35.	Agree dates for whole Trust working (biennial)			Approve	Implement		Advise	Sponsored

2. Staffing			Members	Directors	CEO	Central Team	LGB	SLT	Support level notes
Appointments	2.1.	Executive Headteacher/ Headteacher appointments (selection panel has representation from directors) For sponsored schools the Board of Directors are the selection panel.		Advise	Implement	Advise	Approve Perform		Supporting
				Approve Perform	Implement	Advise	Advise		Supported
	2.2.	Head of School Appointments			Advise	Advise	Approve Perform	Perform Advise	
	2.3.	Appointment of Deputy Head – Directors may wish to be involved in selection panel		Advise	Advise	Advise	Approve	Perform	Supporting
				Approve	Implement	Advise	Perform	Advise	Sponsored
	2.4.	Appointment of all other Staff – HT must be a member of the appointment panel. Where changes to staffing are proposed the Trust must be informed prior to advertisement. Advertise on Trust website and ensure staffing information kept up to date.			Advise	Advise Monitor	Approve Perform	Perform	
Consistency across Trust	2.5.	School staffing levels and roles - Job Descriptions and Pay must be appropriate to similar roles across the Trust		Review	Advise	Advise	Approve	Perform	Supporting
				Approve	Advise	Advise	Implement	Perform	Sponsored
Budget and pay	2.6.	Determining staff complement within agreed budget		Review	Advise	Advise	Approve	Perform	Supporting
				Approve	Advise	Advise	Implement	Perform	Sponsored

2. Staffing			Members	Directors	CEO	Central Team	LGB	SLT	Support level notes
Budget and pay	2.7.	Approve pay discretions in-line with Trust policies and procedures		Review	Advise	Implement	Approve	Perform	Supporting
				Approve	Advise	Implement	Advise	Perform	Supported
				Approve	Advise	Implement	Advise	Perform	Sponsored
Contracts	2.8.	Consultation and review of contracts of employment with Union and working-group involvement where appropriate		Approve	Implement	Perform			
Dismissals	2.9.	Undertaking to dismiss Executive Headteacher/Headteacher, Head of School or Deputy Headteacher. The Chair of the School's LGB, or other LGB representative, must be included in the decision-making panel.		Approve	Advise	Advise	Advise		
	2.10.	Undertaking to dismiss other staff. The Chair of the LGB, or other LGB representative, must be included in the decision-making panel.		Review	Advise	Advise	Approve	Advise	Supporting
				Approve	Advise	Advise	Advise	Advise	Sponsored
Suspensions	2.11.	Suspending and ending suspension of the Executive Headteacher or Headteacher or Head of School or Deputy Headteacher. The Chair of the LGB, or other LGB representative, must be included in the decision-making panel.		Approve	Advise		Advise		
	2.12.	Suspending other Staff in-line with Trust HR policies and procedures.			Advise	Advise	Advise	Approve	

2. Staffing			Members	Directors	CEO	Central Team	LGB	SLT	Support level notes
	2.13.	Ending the suspension of other staff in-line with Trust HR policies and procedures.		Review	Advise	Advise	Approve	Advise Implement	Supporting Supported
				Approve	Advise	Advise	Advise	Advise Implement	Sponsored
Applying HR Policies	2.14.	Applying all HR policies including Managing Change, disciplinary, capability, grievance, appeals etc. in school settings		Review	Advise	Advise	Approve Implement		Supporting Supported
				Approve	Advise	Advise	Implement		Sponsored
	2.15.	Determining payments for: <ul style="list-style-type: none"> ○ Dismissal ○ Early Retirement Voluntary Redundancy		Approve	Advise	Advise Implement	Advise	Advise	

3. Education			Members	Directors	CEO	Central Team	LGB	SLT	Support level notes
School Effectiveness	3.1.	School improvement plan setting and implementation			Review		Approve	Implement Perform	Supporting
				Approve	Advise Review		Advise	Implement Perform	Supported
	3.2.	To assign responsibility to strands in the school improvement plan – leadership, assessment, pedagogy, and curriculum, learning environment and student and family support		Review	Advise		Approve	Advise	Supporting
				Approve	Review		Implement	Advise	Supported
	3.3.	To complete, review and update a School Evaluation Form at least every two years using the Trust's SEF template.			Advise		Approve Review	Advise	
	3.4.	To set targets for overall pupil achievement in consultation with each school		Approve Review	Implement		Advise	Perform	
	3.5.	Pupil outcomes and monitoring		Approve	Review	Advise	Implement	Perform	Supporting
				Approve Implement	Review	Advise	Advise	Perform	Supported
	3.6.	Individual pupil achievement					Review	Approve Perform	
Curriculum	3.7.	Using the National Curriculum 2014 to develop and deliver a broad, balanced, and inclusive curriculum that reflects and supports each school's individual context and strategic aims.		Review	Advise		Approve	Implement	Supporting
				Approve	Advise		Advise	Implement	Supported

3. Education			Members	Directors	CEO	Central Team	LGB	SLT	Support level notes
	3.8.	Standards of teaching		Approve	Advise		Implement	Review	Supporting
									Supported
	3.9.	Meeting the educational needs of individual children		Approve	Advise		Advise	Review	Sponsored
				Implement					
	3.9.	Meeting the educational needs of individual children		Review	Advise		Approve	Implement	Supporting
									Supported
				Approve	Advise		Advise	Implement	Sponsored
Collective Worship	3.10.	Collective Worship arrangements			Review		Approve	Implement	
Pupil Reporting Requirements	3.11.	Pupil Premium Planning and Reporting			Advise	Review	Approve	Implement	Supporting
				Approve	Advise	Review	Implement	Implement	Supported
	3.12.	SEND data collection and reporting incl. plan development and review			Advise	Review	Advise	Approve	Sponsored
									Supporting
				Approve	Advise	Review	Implement	Implement	Supported
									Sponsored
Pupil Reporting Requirements cont.	3.13.	PE funding Planning and Reporting			Advise	Review	Approve	Implement	
	3.14.	ESFA Census data collection and reporting incl. UIFSM				Advise	Review	Approve Implement	
	3.15.	Early Years nursery data collection and reporting				Advise	Review	Approve Implement	

4. Finance			Members	Directors	CEO	Central Team	LGB	SLT	Support level notes
Budgets and Finance	4.1.	Ensure each School knows their overall funding allocation each year		Approve	Implement	Perform			
	4.2.	Agree the recharge for services delivered by the Central Trust		Approve	Review	Implement	Advise		
	4.3.	To approve the first formal budget plan each financial year (1 st Sept – 31 st Aug)		Approve	Advise		Advise		
	4.4.	Undertake formal budget reviews and updates each year in January and April		Review	Implement	Perform	Approve Perform	Advise Perform	Supporting
				Approve	Implement	Perform	Advise Implement	Advise Perform	Supported Sponsored
	4.5.	Monitor monthly expenditure and report termly		Review	Implement	Advise Perform	Approve Perform	Advise	Supporting Supported
				Review	Approve Implement	Advise Perform	Perform	Advise	Sponsored
	4.6.	Amend budget headings and make virements between headings in the current year. *		Review	Advise	Advise Perform	Approve Implement	Advise	Supporting Supported
				Review	Approve Implement	Advise Perform	Advise Perform	Advise	Sponsored

4. Finance			Members	Directors	CEO	Central Team	LGB	SLT	Support level notes
Budgets and Finance cont.	4.7.	Recognise and seek advice for likely budget overspends in the current year.*		Review	Advise	Advise Perform	Approve Implement	Advise	Supporting
				Review	Approve Implement	Advise Perform	Advise Perform	Advise	Supported
				Review	Approve Implement	Advise Perform	Advise Perform	Advise	Sponsored
Lettings	4.8.	Lettings/ charging policy for use of school facilities which ensures full cost recovery for services				Advise Review	Approve	Implement	
Central Trust operations	4.9.	Set central Trust staffing levels and roles		Approve	Advise Implement		Advise		
	4.10.	Set finance management and procurement systems, policies and procedures including setting of financial decision levels in line with Education and Skills Funding Agency (ESFA) guidance.		Approve Review		Advise Implement	Perform	Perform	
Asset Management	4.11.	Maintenance of Asset Registers and reporting to the Trust as part of the financial audit process				Advise Review	Approve	Implement	
Insurance	4.12.	All Trust schools are members of the Risk Protection Arrangement (RPA) for insurance: third party, public liability, buildings, trips, and school activities etc.		Approve	Implement	Perform Review			
	4.13.	Further insurance requirements e.g., staff absence, occasional business use				Advise	Approve	Advise Implement	

4. Finance			Members	Directors	CEO	Central Team	LGB	SLT	Support level notes
Funding bids	4.14.	Develop and submit funding bids. Where applicable these will be approved before submission by the Finance Committee				Advise	Approve Implement	Perform	Supporting
				Approve		Advise	Implement	Perform	Supported
Devolved Formula Capital	4.15.	Use of devolved formula capital. Allocation of DFC funds agreed through an application process.			Advise	Advise Review	Approve Implement		Supporting
				Approve	Advise	Advise Review	Implement		Supported
Fundraising	4.16.	Fundraising activities				Advise	Approve Implement	Advise	
LGB Expenses	4.17.	Management of LGB expenses scheme		Approve		Implement Review	Perform		
Financial Oversight and internal scrutiny	4.18.	Deliver and monitor robust financial oversight procedures as per the Trust Finance Manual.		Approve Review	Implement Perform Review	Perform	Perform	Perform	
	4.19.	Deliver and monitor a programme of internal scrutiny as per the Trust Finance Manual		Approve Review	Implement Review	Perform Review	Perform	Perform	
	4.20.	Ensure that all staff cooperate with the Trust's appointed auditors and act on their reasonable recommendations		Approve	Implement Review	Perform	Perform Review	Perform	

*Where a matter cannot be resolved it will be referred to the CEO or Chair of the Finance Committee

5. Operations			Members	Directors	CEO	Central Team	LGB	SLT	Support level notes
Legal Requirements	5.1.	Ensuring compliance with all legal duties and requirements, including but not limited to: <ul style="list-style-type: none"> • Health and Safety • Equality • Attendance • Website • Safeguarding • Cyber Security • Data Protection 		Approve	Review	Implement Perform	Perform	Perform	
	5.2.	Ensure compliance with all Data Protection* legislation and good practice including understanding everyone's role and responsibility (See Data Protection Policy for further details).		Approve	Review	Implement Perform	Perform	Perform	*Data Protection is everyone's responsibility
	5.3.	Ensure all statutory functions relating to the operation of the Trust are completed, e.g., <ul style="list-style-type: none"> • School Improvement • Companies House and other statutory reporting • Charity Commission reporting • DfE, Secretary of State and EFA 		Approve	Review	Implement Perform			

5. Operations			Members	Directors	CEO	Central Team	LGB	SLT	Support level notes
Legal Requirements cont.	5.4.	Ensure the Trust is appropriately identified on all outward facing communications and signage including correct use of the Company Number		Review	Approve Implement	Perform	Implement	Perform	
Central Services and Operations	5.5.	Determine the scope of core services: <ul style="list-style-type: none"> • Finance • HR • Health and Safety • Payroll • Auditors To be delivered by the Central Team.		Approve	Advise	Implement Perform	Advise	Advise	
	5.6.	Ongoing review of central services and services acquired centrally on behalf of schools. To consider: <ul style="list-style-type: none"> • Quality • Value for money • Scope 		Review	Approve	Implement Perform	Advise	Advise	
	5.7.	Identify additional services to be procured on behalf of individual schools		Review	Advise Review	Implement	Approve	Advise Perform	Supporting
School Operations				Approve	Advise Review	Implement	Advise	Advise Perform	Sponsored
	5.8.	Agree suggested uniform options					Approve	Implement	
	5.9.	Management of additional non-school provision e.g., breakfast, after-school clubs, community use facilities etc.				Review	Approve Review	Implement	Supporting
				Approve		Review	Advise Review	Implement	Sponsored

6. Estate Management			Members	Directors	CEO	Central Team	LGB	SLT	Support level notes
Estate Management Strategy	6.1.	Developing a medium to long term strategic estate plan including vision		Approve	Implement	Advise	Advise Review	Perform	
	6.2.	Developing an Asset Management and Maintenance policy and supporting documents as required by legislation or government guidance/best practice using the Trust's policy.		Approve	Implement	Advise	Advise Review	Perform	
Estate Management	6.3.	Planning for emergencies and business continuity e.g., ensuring the estate is integral in Organisational emergency planning		Approve	Implement	Advise	Advise Review	Perform	
	6.4.	Ensuring all buildings are safe, secure and comply with statutory requirements e.g., managing and monitoring the safe use and operation of the estate					Approve Review	Implement Perform	
	6.5.	Managing the performance of the estate to ensure it delivers value for money (as part of accountability for financial performance?)		Approve		Advise	Advise Review	Perform	
	6.6.	Undertake all legally required surveys including asbestos surveys					Approve Review	Implement Perform	

6. Estate Management			Members	Directors	CEO	Central Team	LGB	SLT	Support level notes
Managing Projects	6.7.	Completing relevant application forms for all capital project expenditure		Review		Advise	Approve	Perform	Use Trust recommended building consultants for large scale projects
External Grant funding	6.8.	Applying for external grant funding		Review		Advise	Approve	Perform	
Capital Expenditure including DFC	6.9.	Develop and deliver projects identified as part of the Asset Management process		Review		Advise	Approve	Perform	
Condition Improvement Fund bids	6.10.	Develop and deliver projects identified as part of the Asset Management process			Approve	Advise	Review	Perform	

7. Safeguarding			Members	Directors	CEO	Central Team	LGB	SLT	Support level notes
Strategy	7.1.	Setting the Trust's overall Safeguarding strategy in consultation with Schools		Approve	Advise Implement		Advise		
	7.2.	Ensure correct publication of policies for Trust				Approve			
	7.3.	Ensure correct publication of policies for schools				Advise	Review	Approve	
Monitoring and Annual requirements	7.4.	Ensuring safeguarding compliance across the Trust		Approve	Advise		Implement		
	7.5.	Monitoring safeguarding arrangements in schools			Approve Perform				
	7.6.	Completing annual safeguarding requirements: <ul style="list-style-type: none"> • Annual Safeguarding Audit • Annual Safeguarding report from LGB 		Review			Approve		
Training	7.7.	Ensuring safeguarding training requirements are met across the Trust		Approve	Implement	Advise	Implement	Implement	
	7.8.	Researching and implementing appropriate training schemes		Review		Approve	Advise Implement		

8. Inspections including Ofsted, SIAMs and ESFA			Members	Directors	CEO	Central Team	LGB	SLT	Support level notes
Preparation, Support and Training	8.1.	Ensure appropriate support for each school and LGB prior to, during and after an inspection		Advise Review	Approve	Implement Perform	Implement Perform	Advise Implement	
	8.2.	Ensure that all changes and updates to the inspection criteria are communicated effectively		Advise Review	Approve	Implement			
	8.3.	Provide adequate training on current inspection standards and requirements		Advise Review	Approve	Implement Perform	Advise		
	8.4.	Liaise with appropriate external organisations (e.g., Diocese for SIAMS, Auditor for ESFA, HMI for Ofsted)			Advise		Approve	Advise Perform	
Reporting Requirements	8.5.	Ensure inspections outcomes are communicated in line with statutory requirements			Advise	Advise Review	Approve	Implement	

9. Church of England Schools ONLY			Members	Directors	CEO	Central Team	LGB	SLT	Support level notes
Christian Character	9.1.	Have responsibility for creating, maintaining, and reviewing the school's distinctive Christian character			Advise Review		Approve Review	Implement	
Church and Community Relationships	9.2.	Develop and maintain partnerships between: <ul style="list-style-type: none"> Trust and Diocese 		Review	Approve Perform	Perform	Advise		
	9.3.	<ul style="list-style-type: none"> School and Parish 		Review			Approve Perform	Perform	