

Scheme of Delegation

Document control		POLICY LEVEL: Trust / Statutory	
Approved by	Full Trustees	Approved Date	16 th July 2025
Portfolio	Board	Next Review	Annually
Published	https://www.dartmoormat.org.uk/policies-and-documents.html		
Version	Date issued	Author	Update information
V1.0	Dec 2017	Michelmores	First published version
V1.1	6 Feb 2018	Trustees	Removal of Michelmores logo
V1.2	6 Feb 2018	Trustees	Amendments to LGB appointment process. Amendment to Headteacher appointment on the LGB
V1.3	27 Mar 2018	Trustees	Updated governance overview diagram Addition of COO to Ethos Committee Change to Audit committee in line with AFH Changes to terminology relating to Principal/Head & Head of School
V1.4	19 Jul 2018	Trustees	Governance Overview diagram updated to reflect that LGB Foundation Governor appointments can be recommended by the LGB / agreed by the Trustee Board with no Diocese part of the process Spelling error corrected. Removal of reference to COO throughout the document Insertion of quorum for LGB meetings
V2.0	7 Feb 2020	Trustees	Replace term LGB with Local Stakeholder Board. Wording regarding foundation governors amended. Changed Governance and staffing overview diagrams. Update of Trustee committee structure/descriptions. Update of wording of elements of an effective AC. Revised table of responsibilities.
V2.1	16 July 2020	Trustees	Updated Portfolio Lead details. Addition of Trustee signature page.
V3	5 Feb 2021	Trustees	Revised table of responsibilities to reflect the line management of Headteachers by CEO/Vice CEO and to reflect updated governance and staffing overview structure diagram to include St James and new positions in central team. Removal diagram 3a. Wording added to 9.19.
V4	29 April 2021	Trustees	Updated to reflect NGA guidance. Update to reflect new governance plan and GAG funding. Combining some duties to improve readability. Update to Principals replacing HT/Exec/HOS. Removal of signature page.
V5	8 November 2021	Trustees	Updated 4.2. Updated 5.4.2 to remove accountability for Single Central Records checks, website compliance checks and Health and Safety checks in line with updated Terms of Reference. 5.4.3 amended to add additional Community governors for non-Church hubs in lieu of Foundation governors. Updated 5.3.5 to remove Staff elements from Resolutions committee. Removed LSB duties on 7.24, 7.77, 7.100. Added 7.102
V6	19 January 2022	Trustees	3. Removal of recommend from CEO. 6. Updated to explain the role of delegation to Trust Board Committees. Update of 5.3.5 to reflect LSB panels for exclusions, complaints and admission appeals; Resolutions Committee at Trust Board level to hear Stage 3 complaints and exclusion appeals; Nominations Committee at Trust Board level to approve LSB governors and Trustee nominations. Updates to 7. 20. removal of LSB element as this is covered in School Improvement;

			25. Removal of CEO recommendation. 43. Removal of CEO recommendation 44. LSB to comply not consult; 46. LSB and CEO to be consulted; 75; removal of LSB monitoring; 80. Removal of LSB monitoring as covered under School Improvement; 85. Removal of LSB monitoring of finance policies;
V7	15 th December 2022	Trustees	Inclusion of new committee (ISJ) 5.3.5. Updated governance structure diagram. 5.3.2 updated change of Audit Committee full name. Updated visuals for visions and values. 5.3.6 inclusion of Remuneration Committee.
V8	19 January 2023	Trustees	Compliance section 25 – reference to Resolutions Committee in respect of statutory requirement around, review of suspensions and stage 2 complaints. School Improvement section 68 – the inclusion of school closure for illness or strike action.
V9	2 nd May 2023	Trustees	Update of LSB structure to reflect movement of schools within Hubs. Update of Trust Operational structure to reflect role introductions/changes. Item 49 included to reflect new Trust Development plan that is to be implemented for Sept.
V10	14 th Sept 2023	Trustees	Updated to reflect the split in local governance to advocates for primary settings and local stakeholder board governors for the secondaries. Introduction of the new committees, Primary Advocacy Board and Secondary Stakeholder Board. Updates from D Edg to Trust Leadership Board. Change from CEO to Trust Leader and Deputy Trust Leader/CFOO
V11	17 th July 2024	Trustees	Updated (point 100) to enable DTL to dismiss staff. Update of Committee structure.
V12		Trustees	Section 3 - Update of Primary Advocate Board. 4.63 Amendment to quoracy for LSB Meetings. 4.65 – Amendment of electronic signature to include Teams approval 4.71 – Update of Executive Team Section 8 – Responsibilities 7 – Appointment of Senior Staff 10 – Add TB Monitor Trust Culture & Values 93 – Include TB approval of salary for Principals and senior roles 96 – Include TB Approval for HR Policies
V13	16 th July 2025	Trustees	1. Introduction – removal of detail to focus on the document purpose 2. Key Responsibilities – removal of detail to focus on key responsibilities 3. Glossary – a) Merge 'Agree' and 'Approve' to become 'Approve' b) Merge 'Scrutiny' and 'Monitor' to become 'Monitor' c) Trust Board Committees – made the statement applicable to all Trust Board committees. 4. Reference to Advocate removed, and replaced with Governor. Table of Responsibilities: Changed throughout: Agree/Approve becomes Approve; Scrutiny/Monitor becomes Monitor 8. Add 'where budgetary approval in place' 10. Additional line: In-year appointment of staff where no approved budget Principal to recommend, Trust Leader to approve

			15. (School Strategic objectives): Principal consult with Governors / LSB; Advocates/LSB recommend ; Trust Leader approve; Trust Board monitor 25. (Convening resolution committees) Add perform to Governors and LSB 27. (Scheme of Delegation) Add consult to Principal, Governors, LSB 33. (Appointment/removal of Advocates) Add consult to Principal 34. (Election of Parent/Staff governors) Add approve to Governors and LSB 36. (Election of LSB Chair/Vice Chair) Add recommend to LSB 42. (Annual business cycle for LSB) Add consult to LSB 44. (Articles of Association) Change to consult for Trust Leader, recommend to Trust Board 45. (Governance structure) Add consult to Principal and change to consult for Trust Leader 47. (school based policies) Add approve to Governors 51. (School development plan) Add recommend to Governors and LSB 54. (Deliver EY curriculum) Add monitor to Governors 56. (CPD programme) Add monitor to Governors 58. (Setting Admission arrangements) Add consult to Governors and LSB 59. (Change in age range) Add consult to Governors and LSB Removal of (old) line 66: keeping admission and attendance register in line with statutory requirements 66. (set Behaviour Policy) Add recommend to Principal, Governors and LSB 68. (permanent exclusions) Change to approve for Principal and consult for Trust Leader 69. (School operational hours, term dates etc) Add consult for Governors 70. (Provision of school lunch) Add consult for Governors 71. (Provision of FSM) Add monitor for Governors 73. (Support for LAC) Add monitor for Governors 75. (Public sector equality duty) Add monitor for Governors 78. (Maintain SCR) Add monitor to Governors and LSB 82. (Individual school budget) Change 'monitor' to perform for Principal 93. (Principals and senior roles salary) Add wording: in line with the approved pay policy 96. (School staffing structure) Add consult for Governors and LSB 102. (Requests for retirement/flex working etc) Change to approve (school level) for Principal; approve (executive) for Trust Leader; approve (trust leader) for Trust Board. 105. (Hear grievance, etc) Add perform (appeals process) for Governors and LSB 112. (Websites, prospectus etc) Add monitor for Governors and LSB
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1. Scheme of Delegation

This Scheme of Delegation (SoD) identifies the key decisions required in connection with the overall governance and management of the Trust and its academies.

The SoD sets out the delegation by the Trustees under Article 105 of the Trust's Articles of Association. It is designed to set out clearly the respective roles and responsibilities across all layers of governance. The different layers of governance are explained in more detail in the Section relating to Layers of Governance: Roles and Responsibilities of this SoD.

This SoD should be read in conjunction with the Trust's Articles of Association and Terms of Reference.

This SoD will be reviewed on an annual basis by the Board of Trustees, or more frequently if required. If any material changes are proposed to this SoD, the Board of Trustees will have regard to any representations of Advocates and Local Stakeholder Boards. However, this SoD may only be altered or revoked by the Board of Trustees.

1.2 Operational Structures

To support the vision and values of our Trust, our 3-year objectives and our longer-term ambitions, our structures support and develop our academies through agile teams centered around key areas of focus, with our academies at the centre.

The Trust Leadership Board is our Executive Team and is where we find balance in the work we undertake between professional accountability and democratic accountability to ensure that we focus on the needs of the communities we serve. We subscribe to the Ethical Framework for Educational Leadership; based upon the seven Nolan principles of public life.

2. Governance Key Roles and Responsibilities

The Trust is a company limited by guarantee and in accordance with the Academies Act 2010 is an exempt charity.

The Trust's three core layers of governance are Members, Trustees and the local layer of governance that is split between Primary Advocates and Secondary Local Stakeholder Boards.

2.1 Members

The Members are guardians of the governance of the Trust and, as such, have a different status to Trustees. Originally, they were signatories to the Memorandum of Association and agreed the Trust's first Articles of Association (the legal document which outlines the governance structure and how the trust will operate). The Members have ultimate control over the Trust.

DMAT has five members. Members are not permitted to be employees of DMAT.

The Articles of Association also describe how members are recruited and replaced, and how many of the Trustees the Members can appoint to the Trust Board (up to 7). The Members have the ability to appoint some of the Trustees to ensure that the Trust's charitable object is carried out and are able to remove Trustees if they fail to fulfil this responsibility. Accordingly, the Trust Board submits an annual report on the performance of the Trust to the Members.

Members are also responsible for approving any amendments made to the Trust's Articles of Association.

2.2 Trustees

The Trustees are responsible for the general control of the Trust in accordance with the provisions set out in the Articles of Association and this Scheme of Delegation. The Board of Trustees is the accountable body for the performance of all Academies within the Trust and, as such, must:

1. Ensure clarity of vision, ethos and strategic direction;
2. Hold the Trust Leader to account for the educational performance of the Academies and their pupils, and the performance management of staff; and
3. Oversee the financial performance of the Trust, ensuring financial probity and value for money.
4. Hold the Primary Advocates and Secondary Local Stakeholder Boards to account for effective Governance at the level 'knowing and understanding the school' as outlined in this Scheme of Delegation.

The Board of Trustees is permitted to exercise all the powers of the Trust. The Board of Trustees delegates, to the Trust Leader, responsibility for the day-to-day operations of the Trust.

The Trustees (with the consent of the Members where changes to the Board of Trustees are at issue) have the right to review and adapt the Trust's governance structure at any time, which includes issuing or revoking delegation.

2.3 The Trustees' Committees

The Trust board has established a number of committees which have delegated responsibility as set out in their Terms of Reference and aligned to this Scheme of Delegation. Terms of Reference are reviewed annually and when changes are made to this document.

2.4 Executive Team

1. The Trust Leader reports to the Board of Trustees on the performance of the Trust including performance of the Trust's Academies, which is supplemented by monitoring reports from Advocates and Local Stakeholder Boards. The Trust Leader is held to account by the Board of Trustees
2. The Trust Leader has delegated responsibility for the operation of the Trust, including the performance of the Trust's Academies and is responsible for all staff across the Trust.
3. The Trust Leader is the Accounting Officer with overall responsibility for the operation of the Trust's financial responsibilities and must ensure that the organisation is run with financial probity, effectiveness and stability, avoiding waste and securing value for money.
4. The Trust Leader and CFO oversee the work of the Trust Operations, including Finance, Digital (including Information Security & Data Protection ¹⁾, Estates, and People to support and implement school and Trust development priorities across DMAT, sharing expertise and transforming practice.

DMAT Schools

The Academy Principals are responsible for the day-to-day management of their academies.

Principals are accountable to the Trust Leader. Principals co-construct and deliver the aims, vision and values of the Trust alongside the Executive and Board of Trustees. The Principals work with Governors and Local Stakeholder Boards to monitor standards, and agree school development and improvement plans.

¹ In line with the GDPR, the DPO maintains a direct line of reporting to the Trust Leader and Trust board.

3. Glossary to Table of Responsibilities

In line with best practice, delegations are defined (rather than by 'ticking' to indicate activity by the stakeholder). DMAT has adopted the following matrix.

Members: Under normal on-going Trust activities the Members do not get involved with the day-to-day operations of the Trust Board or the leadership activities of the Trust Leader. Members keep a watching brief through their meetings with the Trust Board Chair and the Trust Leader. Members hold the Trust Board to account for the effective governance of the Trust, but they have a minimal impact on the running of the Trust. Members are essential to the integrity of an academy trust structure. They are the last line of defence from the failure of governance and failure to uphold the charitable objects of the organisation.

Perform	The individual/group will follow agreed policies and procedures or carry out specified duties. They are accountable for executing or implementing decisions or policies. They may be required to report on the delivery of duties/actions. In the case of (i) the Trust Leader, reports will be to the Board and/or LSB (as appropriate), (ii) the LSB, they will be making reports in relation to their school to the Board and/or Trust Leader (as appropriate) and (iii) the Principal, they will be making reports in relation to their school to the Trust Leader and/or Secondary LSB (as appropriate).
Consult	The individual/group that should be consulted as part of the process of completing a particular task. 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. This role is a supporting role
Recommend	The individual/group that should make recommendations as to how a particular task should be completed or what particular course of action should be taken. The Recommend role typically involves a significant element of work in a decision. They may gather relevant input (Consult) and propose a course of action—sometimes alternative courses, complete with pros and cons so that the Approver's choices are clear, simple and timely.
Approve	This role represents a formal approval of a recommendation. Approves the decision or activity. Accountable for making sure the activity is satisfactory and meets performance standards. May delegate work. There must be only one Approve body specified for each task.
Monitor	The individual/group which observes, checks and ensures the delivery of a particular task. They may be required to report to other groups. The individual/groups may undertake a careful and detailed examination of a particular task to ensure compliance.
Strategic Overview	The individual/group will observe and gain an appropriate level of understanding of a particular task or issue, commenting as appropriate
Trust Board Committees	Trust Board Committees have delegated responsibilities to review and scrutinise areas set out in their TOR with a view of providing a recommendation to the Trust Board for approval.
Governors	Primary Governors who meet within the Primary Stakeholder Board
LSB	Secondary Governors who meet within Local Stakeholder Boards / The Secondary Stakeholder Board
Trust Leader	Trust Leader / Chief Executive Officer
Deputy Trust Leader/CFOO	Deputy Trust Leader / Chief Finance and Operations Officer

4. Table of Responsibilities

Appointments		Appointed Position	Principal	Governor	LSB	Trust Leader	Trust Board
	1.	Members: Appoint / remove, ensuring that C of E academies are represented at this level					
	2.	Role descriptions for members					
	3.	Role descriptions for Trustees/ Chairs/ Specific roles/ Committees					Approve
	4.	Trustees					Approve Co-opted Trustees
	5.	Trust Leader (Appoint/ Remove)					Recommend Approve
	6.	Accounting Officer (Appoint/ Remove)					Approve
	7.	Principal and senior posts in the Executive, Primary Leadership and Secondary Leadership Teams (Appoint/ Remove)				Recommend	Approve ²
	8.	Other School staff including Associate Principal, Head of Department, TLR, Other Teaching Posts (where budgetary approval is in place)	Approve			Consult	
	9.	Appoint CFOO for delivery of Trust's detailed accounting processes and oversight of all Trust administration				Recommend	Approve
	10.	In-year appointment of staff where no approved budget	Recommend			Approve	

Strategic Objectives		Duty	Principal	Governor	LSB	Trust Leader	Trust Board
	11.	Determine the Trust's culture and values				Recommend	Approve Monitor
	12.	Embed the Trust's culture and values	Perform	Perform	Perform	Perform	Perform
	13.	Determine the Trust's strategic objectives, vision and strategy	Consult	Consult	Consult	Recommend	Approve Monitor
	14.	Deliver Trust's strategic objectives, vision and strategy and Key performance indicators				Perform	Monitor
	15.	Determine each school's strategic objectives, vision and strategy	Consult with governors	Recommend	Recommend	Approve	Monitor
	16.	Deliver each School's strategic objectives, vision and strategy	Perform	Monitor	Monitor	Monitor	
	17.	Engaging with parents	Perform	Perform/ Monitor	Perform/ Monitor	Monitor	Monitor

Compliance		Duty	Principal	Governor	LSB	Trust Leader	Trust Board
	18.	Funding Agreement – comply with all obligations including the Schools Financial Handbook	Perform			Perform	Monitor / Perform
	19.	Regulatory – with all regulations affecting the Trust (including all charity law, company law, employment law and health and safety	Perform			Perform Monitor	Monitor / Perform
	20.	Financial Oversight - ensuring that there are appropriate financial controls so that there is regularity, probity and value for money in relation to the management of public funds	Perform			Perform Monitor	Monitor / Perform
	21.	Oversee programme of financial and non-financial internal scrutiny					Monitor / Perform
	22.	Register of business interests, conflicts of interest and connected party transactions	Perform	Perform	Perform	Prepare Monitor	Perform
	23.	Growth of the Trust - consider requests from other schools to join the Trust				Recommend	Monitor Approve
	24.	Compliance with statutory requirements, such as H&S, Fire Management, Safeguarding and Information Governance/ Data Protection	Perform	Monitor	Monitor	Comply Perform Monitor	Monitor
	25.	Convening Resolution Committees (Stage 3 complaints, reviewing suspensions and permanent exclusions)		Perform	Perform		Monitor / Perform

		Duty	Principal	Governor	LSB	Trust Leader	Trust Board
Governance and Structure	26.	Appointment and removal of Trustees as set out in Trust Articles. ²					Recommend / Approve
	27.	Scheme of Delegation	Consult	Consult	Consult	Recommend	Recommend/ Approve
	28.	Appointment and removal of Trust Chair and Vice Chair of the Trust Board					Approve
	29.	Appointment and removal of Chair and Vice Chair of Trust Committees					Approve
	30.	Appointment of Lead Trustee for SEND, H&S, Safeguarding and Whistleblowing					Approve
	31.	Trust Committees (Structure and membership)					Recommend / Approve
	32.	Appointment / removal of LSB Governors. ³			Recommend		Approve
	33.	Appointment / removal of Governors	Consult				Recommend/ Approve
	34.	Election of Parent and Staff governors.		Approve	Approve		Monitor
	35.	Annual review of Trust performance				Perform	Approve
	36.	Election of LSB of Chair and Vice- Chair			Recommend		Approve
	37.	Annual review of LSB performance	Advise		Perform		Monitor
	38.	Power to remove/ amend an LSB				Recommend	Approve
	39.	Appointment of the External Auditors					Recommend / Approve

² Note the process of appointment and removal of Diocese appointed Trustees

³ Trustees to discuss the skills needs of each LSB with LSB Chair following LSB Skills audit and performance review
DMAT Scheme of Delegation

		Duty	Principal	Governor	LSB	Trust Leader	Trust Board
Governance and Structure	40.	External Auditor reports: receive / respond	Comply			Perform	Approve / Monitor
	41.	Annual Cycle of Business for Trust Board				Recommend	Approve
	42.	Annual Cycle of Business for Local Governance		Consult	Consult	Recommend	Approve
	43.	LSB Agenda and Minutes			Comply		
	44.	Agree Articles of Association				Consult	Recommend
	45.	Governance Structure for the Trust (including Governance Annual Review)	Consult	Consult	Consult	Consult	Recommend / Agree
	46.	Policies (Statutory Trust-wide policies)	Comply	Comply	Comply	Recommend	Approve
	47.	Policies – review and approval of specific school policies ⁴	Recommend	Approve	Approve		
	48.	Terms of reference: Trust and LSB Committees		Consult	Consult	Consult	Approve
	49.	CPD for Trustees, Advocates and LSB Governors		Recommend Perform	Recommend Perform	Recommend	Perform Approve
	50.	Trust Development Plan – oversight, seeking assurance and evidence of impact	Perform	Perform	Perform	Perform	Perform Approve

⁴ In practice, there will be very few school-based policies which require LSB approval.
DMAT Scheme of Delegation

School Improvement			Principal	Governor	LSB	Trust Leader	Trust Board
	51.	School Development Plan / Objectives	Recommend / Perform	Recommend	Recommend	Approve	Monitor
	52.	Improve the quality of education in schools	Perform	Monitor	Monitor	Strategic Overview	Monitor
	53.	Curriculum Intent: implementation and impact	Perform	Monitor	Monitor	Approve Monitor	Monitor
	54.	Deliver early years curriculum in line with Early Years Foundation Stage (EYFS) framework	Perform	Monitor		Monitor	Monitor
	55.	Ofsted and SIAMS: Ensure academies are inspection ready	Perform	Monitor	Monitor	Monitor	Monitor
	56.	CPD Programme: Implement and impact	Perform	Monitor	Monitor	Recommend Monitor	Monitor
	57.	Report on delivery and impact of ring-fenced funding (<i>Pupil Premium, Sports Premium (Primary), Year 7 Catch up, Covid Catch up, SEND</i>)	Perform	Monitor	Monitor	Monitor	Strategic Overview
	58.	Setting Admission Arrangements for individual academies for approval at Trust Board.	Consult	Consult	Consult	Recommend	Approve
	59.	Change in age range of any of the Trust's schools	Consult	Consult	Consult	Recommend	Approve
	60.	Collective Worship arrangements.	Perform	Monitor		Monitor	Monitor
	61.	Provision of Sex & Relationships Education (SRE) in line with statutory requirements	Perform	Monitor	Monitor	Monitor	
	62.	Provision of Careers Education in line with statutory requirements	Perform		Monitor	Monitor	Monitor

			Principal	Governor	LSB	Trust Leader	Trust Board
School Improvement	63.	C of E Academies Only. Responsibility for school's distinctive Christian character.	Perform	Monitor		Monitor	Monitor
	64.	C of E Academies Only. Responsibility for maintaining and developing partnership between school and church at parish and diocesan level.	Perform	Monitor		Perform	Monitor
	65.	Student/Pupil issues (including attendance, punctuality and disciplinary matters)	Perform	Monitor	Monitor	Recommend	Monitor
	66.	Set behaviour policy	Recommend	Recommend	Recommend	Approve	Monitor
	67.	Fixed Term Suspensions	Approve	Monitor	Monitor	Monitor	Monitor
	68.	Permanent Exclusions	Approve	Monitor	Monitor	Consult	Monitor
	69.	School Operational Hours / Term Dates/ INSET dates / school closures due to illness or strike action	Recommend	Consult	Consult	Approve	Strategic Overview
	70.	School lunch – ensure provided to appropriate nutritional standards	Perform	Consult	Consult	Perform Monitor	Monitor
	71.	Provision of free school meals to those meeting criteria	Perform	Monitor	Monitor		Monitor
	72.	To implement effective safeguarding policies	Perform	Monitor	Monitor	Monitor	Monitor

			Principal	Governor	LSB	Trust Leader	Trust Board
School Improvement	73.	Deliver support to Looked After Children and Previously Looked After Children	Perform	Monitor	Monitor	Monitor	Monitor
	74.	To implement SEND policy, and equality duty	Perform	Monitor	Monitor	Monitor	Monitor
	75.	To ensure the public sector equality duty is met	Perform	Monitor	Monitor	Perform Monitor	Monitor
	76.	Maintain accurate and effective and secure pupil records.	Perform	Monitor	Monitor		Monitor
	77.	Maintain accurate and effective and secure employee files.	Perform			Perform	Monitor
	78.	Maintain an accurate and effective and secure Single Central Record (SCR)	Perform	Monitor	Monitor	Perform Monitor	Monitor
	79.	Undertake pre-appointment checks for staff & governance stakeholders inc. DBS	Perform			Perform	Monitor
	80.	Comply with all Data Protection legislation and good practice.	Perform	Monitor	Monitor	Perform	Monitor

Overview of Strategic Financial Management

As a family of Academies, our financial strategy seeks to make the best use of the resources at our disposal using the following core principles:

- **Consistent entitlement** – every child or young person should have a consistent entitlement to financial resources in line with their own unique needs regardless of which Academy they attend.
- **Efficiency** – Academy Principals and central Trust services must demonstrably manage the resources under their control as efficiently as possible.
- **Integration and Collaboration** – our aim is to ensure as much resource as possible is directed to the needs of the individual student. Whilst this involves focusing on efficiency it also means working together in hubs, across phases and in the Trust as a whole to support and share resources as best possible.
- **Sustainability** – the ongoing health of the organisation is based on operating within our income levels over the business cycle. Leadership at all levels, national, regional and within every Academy must be demonstrably committed to this end.

To support this strategy:

We monitor key KPIs such as Pupil Teacher Ratios (PTR), Pupil Adult Ratios (PAR), average levels of pay and Student numbers v Academy capacity.

We ensure focused application of our budgets through pooled resources. Principals remain accountable for school specific budgets and manage the bulk of our income in delivering front line education. Our capital funding and non-education spend is managed centrally by our Trust Services team, delivering services, IT infrastructure, Estates management and expenditure, Trust leadership and governance.

Local Stakeholder Boards and Governors are responsible for monitoring the effective impact of ring-fenced funding including Pupil Premium, SEND and Sports Premium.

Both groups are charged with ensuring they deliver value for money through adopting efficient structures, collaborating, and continually challenging themselves improve the impact and cost of the work they do for our students.

Budget Setting

We are required by the ESFA to submit an overall balanced budget. Every year a finance timetable is constructed detailing the phases of budget (and three-year plan) preparation including:

- An initial draft looks at next year's budget in October/November designed to flush out any future strategic challenges.
- This is followed by a detailed update in April/May once we have had formal confirmation of income from the ESFA. These budgets are internally signed off by the CFO and the Accounting Officer prior to gaining Board approval. This budget is consolidated in May in order for us to meet the ESFA's submission deadline.

		Duty	Principal	Governor	LSB	Trust Leader	Trust Board
Finance	81.	Scheme of Financial delegation	Perform			Recommend / Monitor	Approve Monitor
	82.	Individual school Educational budget.	Recommend Perform			Recommend	Approve/ Monitor
	83.	Trust budget				Recommend	Approve
	84.	Management accounts	Monitor			Perform	Monitor
	85.	Managing trust's cash position				Perform	Monitor
	86.	Reporting: Financial reporting and KPIs published in Annual report and lodged with Companies House				Perform	Monitor
	87.	Finance Policies	Perform			Recommend	Approve Monitor
	88.	Annual accounts				Recommend	Approve and Recommend
	89.	Corporate Risk Register	Consult			Perform	Recommend / Approve
	90.	Approve Trust insurance arrangements				Approve	Strategic Overview
	91.	Trust Investments Policy incl. internal controls				Recommend	Approve

		Duty	Principal	Governor	LSB	Trust Leader	Trust Board
Pay and Performance	92.	Determine Trust Leader and Deputy Trust Leader / CFOO pay level, appraisal and pay award					Recommend Approve
	93.	Determine Principals and Senior Roles salary scales in line with the approved pay policy				Recommend	Approve / Monitor
	94.	Executive structure within the agreed budget				Recommend	Approve
	95.	Determine Principals appraisals and pay awards				Approve	Monitor
	96.	School staffing structure within the agreed budget	Approve	Consult	Consult	Consult	Strategic Oversight
	97.	Trust wide Statutory HR Policies	Perform			Recommend	Approve / Monitor
	98.	Delivery Appraisal/ Performance Management Policy and pay reviews for staff	Perform			Approve	Monitor
	99.	Set Terms and Conditions of Employment and Staff Handbook				Approve	Monitor
	100.	Dismiss Trust Leader & Deputy Trust Leader					Approve
	101.	Dismiss Principal / Cross Trust Staff				Approve (TL / DTL)	Monitor
	102.	Consider requests for Early retirement, sabbatical or Flexible working	Approve (school level)			Approve(Executi ve)	Approve (TL)
	103.	Review discipline and grievance policy	Consult			Approve	Monitor
	104.	Comply with Trust Whistleblowing Policy	Perform	Perform	Perform	Perform	Approve Monitor
	105.	Hear Grievance, Disciplinary, Redundancy, Capability cases	Perform	Perform (appeal process)	Perform (appeal process)	Perform	Perform (only in respect of an appeal panel if required) / Monitor

Trust Services		Duty	Principal	Governor	LSB	Trust Leader	Trust Board
	106.	Monitor effectiveness and scope of central services provided to the academies by the Trust	Consult	Consult	Consult	Perform	Monitor
	107.	Set Trust wide procurement policies in accordance with the Funding Agreement, Schools Financial Handbook and the Trust Finance Policy				Recommend	Approve
	108.	Trust Buildings, Asset and Premises Maintenance Strategy	Perform			Recommend/ Monitor	Approve Monitor
	109.	Allocation of SCA	Consult			Recommend	Approve
	110.	Acquiring and disposing of Trust Freehold owned land				Consult	Recommend
	111.	Media and PR of the Trust		Consult	Consult	Perform	Consult Monitor
	112.	Websites, School Prospectus and other public documentation of the Trust	Perform	Monitor	Monitor	Recommend Approve Monitor	Monitor