

Scheme of Delegation Checklist

Trust Delegation Checklist

KEY

Level 1: The Trust

Level 2: The Executive

Level 3: Headteacher

Level 4: Local Governing Bodies (LGB)

Function	No	Tasks	Decision Level			Advice and Monitoring (* denotes Decision Level where applicable)
			1	2	3	4
Central Services	1.	To determine the scope of mandatory core services to be delivered by the Company on behalf of its Academies	X			
	2.	To identify those additional services to be procured on behalf of individual academies	X			

Function	No	Tasks	Decision Level			Advice and Monitoring (* denotes Decision Level where applicable)
			1	2	3	4
	3.	To ensure centrally procured services provide value for money	X			
Budgets	4.	To determine to proportion of the overall Academy budget to be delegated to individual Academies	X			
	5.	To develop and propose the individual Academy budget			X	X
	6.	To approve the first formal budget plan each financial year	X			
	7.	To monitor monthly expenditure			X	X
	8.	To approve any between budget headings and/or likely budget overspends NB the overall school budget must not be in deficit at year end.	X			
	9.	To establish financial decision levels and limits	X	X		
	10.	To establish a school / academy charging and remissions policy			X	X

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	11.	Miscellaneous financial expenditure outside of the agreed budget	X			
	12.	To enter into contracts (Directors will set the financial limits) up to the limits of delegation and within an agreed budget			X	
	13.	To make payments within agreed financial limits			X	
Staffing	14.	Headteacher appointments (selection panel)		X		X
	15.	Deputy appointments (selection panel)			X	X
	16.	Appoint other teachers			X	X
	17.	Appoint non-teaching staff			X	X
	18.	Agree a pay policy	X			
	19.	Pay discretions	X			
	20.	Establishing disciplinary/capability procedures	X			
	21.	Dismissal of Headteacher/Deputy	X			

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	22.	Dismissal of other staff (Deputy Head level and below)			X	X
	23.	Suspending Head	X			
	24.	Suspending other Staff			X	X
	25.	Ending suspension (Head teacher)		X		
	26.	Ending Suspension (Deputy Head level and below)			X	X
	27.	Determining Staff complement within agreed budget			X	X
	28.	Determining dismissal payments/early retirement			X	X
Curriculum	29.	To develop a curriculum policy			X	X
	30.	To implement curriculum policy			X	X
	31.	Responsible for standards of teaching			X	X
	32.	Accountability for standards of teaching		X	X	

Function	No	Tasks	Decision Level			Advice and Monitoring (* denotes Decision Level where applicable)
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	33.	Responsibility for individual child's education		X	X	X
	34.	Accountability for individual child's education.		X	X	
	35.	Provision of sex education – to establish and keep up to date a written policy			X	X
	36.	To prohibit political indoctrination and ensuring the balanced treatment of political issues		X	X	X
	37.	To establish a charging and remissions policy for activities			X	X
Performance Management	38.	To develop a performance management policy		X		
	39a	To implement the performance management policy for Head teachers	X	X		X
	39b	To implement the performance management policy for Deputy Head/Teaching Staff			X	X
	39c	To implement the performance management			X	X

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	39d	policy for Support Staff To implement the performance management policy for Central Team Staff	X	X		
	40.	To review annually the performance management policy	X			
Target Setting	41.	To propose targets for pupil achievement			X	
	42.	To agree targets for pupil achievement			X	
	43.	Responsibility for pupil outcomes			X	X
	44.	Accountability for pupil outcomes		X	X	
	45.	To establish a discipline policy			X	X
	46.	To review the use of exclusion and to decide whether to confirm all permanent exclusions and fixed term exclusions where the pupil is either excluded for more than 15 days in			X	X

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		total in a term or would lose the opportunity to sit a public examination. (Can be delegated to chair/vice-chair in cases of urgency) Headteacher to seek advice from the Executive				
	47.	To direct reinstatement of excluded pupils (Can be delegated to chair/vice-chair in cases of urgency) Headteacher to seek advice from the Executive			X	X
Admissions	48a	To consult before setting an admissions policy			X	X
	48b	To review proposed changes to admissions policy			X	X
	49.	Admissions: application decisions			X	X
	50.	To appeal against LA directions to admit pupil(s) Headteacher to seek advice from the Executive			X	X
Religious Education	51.	Responsibility for ensuring provision of RE in line with school's basic curriculum			X	

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		Headteacher to seek advice from the Diocese Board of Education				
Collective Worship	52.	To ensure that all pupils take part in a daily act of collective worship			X	X
Premises & Insurance	53.	Buildings insurance and personal liability		X		
	54a	Develop the Trust's property strategy		X		
	54b	Developing school buildings strategy or master plan		X		
	55.	Procuring and maintaining buildings, including developing properly funded maintenance plan		X		
	56.	To institute a health and safety policy		X	X	
	57.	To ensure that health and safety regulations are followed		X	X	X
Academy	58.	To publish proposals to change category of school	X			
	59.	To set the times of school sessions and the dates of			X	X

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		school terms and holidays The Headteacher to seek advice from the Executive				
	60.	To ensure that the school meets for 380 sessions in a school year			X	X
	61.	To prepare and publish the school prospectus			X	X
	62.	To ensure provision of free school meals to those pupils meeting the criteria			X	X
	63.	Adoption and review of home-school agreements			X	X
Governance	64.	To draw up governing documents and any amendments thereafter	X	X		
	65a.	To recommend appointment (and removal) the chair of the LGB		X		X
	65b.	To approve appointment and removal of the Chair of the LGB		X		X
	66.	To appoint and dismiss the secretary to the LGB				X *Decision

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	67.	To hold a full LGB meeting at least three times in a school year or a meeting of the temporary governing body as often may require			X	X
	68a.	To recommend appointments (and removal) of members to the LGB (with support from the Executive)				X *Decision
	68b.	To appoint and remove members of the LGB (with support from the Executive)				X *Decision
	69a.	To set up a Register of Directors' Business Interests	X			
	69b.	To set up a Register of LGB members' Business Interests			X	X
	70.	To approve and set up a LGB members' Expenses Scheme		X		X
	71.	To discharge duties in respect of pupils with special needs by appointing a "responsible person"		X		

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	72.	To regulate the LGB procedures (where not set out in law)	X			
	73a.	To put in place Governor's support arrangements.		X		X
	73b.	To determine the development needs of governors and put in place an appropriate program		X		X
	74a.	To consider requests from other schools to join the Trust		X		
	75b.	To approve such requests	X			
	76.	To put into place the additional services provided	X			
	77.	To ensure delivery of services provided		X		
	78.	To cease providing extended school provision The Headteacher to seek advice from the Executive			X	X
Safeguarding	79.	To institute a safeguarding policy		X	X	X

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	80.	To ensure that the safeguarding policy is implemented		X	X	X
Compliance	81a	To determine, on an annual basis, those policies which will be developed by the Trust and mandatory for all Trust Academies	X			
	81b	To ensure there is a critical incident plan in place			X	X
	81c	To ensure academy website is compliant with current data protection and legislative requirements			X	X
	82.	To provide to the Trust, on an annual basis, a schedule all statutory policies and procedures and any additional policies the Trust deems necessary		X		
Strategic	83	To review and or amend the ethos aims and values of the Trust	X	X		
	84a.	To develop the ethos and mission statement for individual academies, within the context of the Trust's		X		

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	84b.	ethos, aims and values To confirm the Ethos and mission statement for individual academies	X			

Note:

The Trust Scheme of Delegation model will be reviewed in full as part of the Trust Governance review at the strategic level.