

APPENDIX TWO

Levels of Delegation

TRUST DELEGATION CHECK LIST

KEY

Level 1: The Multi-Academy Trust (the Company)

Level 2: Local Governing Body (LGB)

Level 3: A committee of the Local Governing Body

Level 4: Headteacher

It should be remembered that although decisions may be delegated, the LGB together with the Trust as a whole remains responsible for any decision made under delegation

Function	No	Tasks	Decision Level			
			1	2	3	4
Central Services	1.	To determine the scope of core services to be delivered by the Company on behalf of its Academies	√			
	2.	To identify those additional services to be procured on behalf of individual academies	√			
	3.	To ensure centrally procured services provide value for money	√			
Budgets	4.	To determine the proportion of the overall Academy budget to be delegated to individual Academies	√			
	5.	To develop and propose the individual Academy budget		√		

Function	No	Tasks	Decision Level			
			1	2	3	4
	6.	To approve the Academy's formal budget plan each financial year	√			
	7.	To monitor monthly expenditure				√
	8.	To monitor the impact of Pupil Premium and PE and Sport Premium funding				√
	9.	To establish financial policy and procedures, decision levels and limits	√			
	10.	To establish a charging and remissions policy		√		
	11.	To approve additional staffing expenditure in schools above their approved budget	√			
	12.	To make payments within agreed financial limits in accordance with the Trust's financial policy and procedures				√
Staffing	13.	To appoint a Headteacher (selection panel)	√			
	14.	To appoint a Deputy (selection panel)			√	
	15.	To appoint other teachers				√
	16.	To appoint support staff				√
	17.	To agree a pay policy	√			
	18.	To make pay decisions in relation to the Headteacher (Trust adviser with pay committee) in line with pay policy	√		√	
	19.	To make pay decisions in relation to other staff in line with			√	

Function	No	Tasks	Decision Level			
			1	2	3	4
		pay policy				
	20.	To establish disciplinary and capability procedures	√			
	21.	To dismiss Headteacher	√			
	22.	To dismiss staff on grounds of ill health and capability, subject to MAT and HR advice				√
	23.	To suspend and end suspension of Headteacher	√			
	24.	To suspend and end suspension of staff				√
	25.	To determine staff complement within agreed budget		√		
	26.	To determine redundancy and early retirement policy and payments	√			
	27.	To determine need for redundancy		√		
	28.	To select for redundancy			√	
	29.	To dismiss staff on grounds of redundancy, subject to MAT and HR advice and policies			√	
Performance Management	30.	To approve a performance management policy	√			
	31.	To implement the performance management policy				√
	32.	To arrange for the performance management of the Headteacher	√			
Curriculum	33.	To develop a curriculum policy		√		
	34.	To establish and keep up to date a sex and relationships education policy in line with the		√		

Function	No	Tasks	Decision Level			
			1	2	3	4
		Trust's model policy				
Target Setting	35.	To agree Key Performance Indicators (KPIs) for the Trust	√			
	36.	To propose targets for pupil achievement in line with the Board's targets				√
	37.	To agree targets for pupil achievement in line with the Board's targets		√		
	38.	To be responsible for pupil outcomes		√		
	39.	To establish a behaviour policy		√		
	40.	To review the use of exclusion and to decide whether or not to confirm all permanent exclusions and fixed term exclusions where the pupil is either excluded for more than 15 days in 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)			√	
	41.	To direct reinstatement of excluded pupils (Can be delegated to chair/vice-chair in cases of urgency)			√	
Admissions	42.	To establish a MAT-wide admission policy annually and ensure that school policies are determined annually by 28 February	√			
	43.	To consult before amending an admissions policy or every 7 years		√		
	44.	To determine the school's admissions policy annually by 28		√		

Function	No	Tasks	Decision Level			
			1	2	3	4
		February				
	45.	To propose oversubscription criteria, subject to compliance with the current School Admissions Code		√		
	46.	To make decisions on pupil admission applications, including out of year group applications			√	
	47.	To appeal against LA directions to admit pupil(s)		√		
Religious Education	48.	To establish a Trust policy on RE	√			
	49.	To ensure provision of RE in line with Trust's policy		√		
Collective Worship	50.	To establish a Trust policy on Collective Worship	√			
	51.	To ensure that all pupils take part in a daily act of collective worship in line with Trust's policy and current legislation		√		
Premises & Insurance	52	To establish an estates strategy	√			
	53.	To ensure buildings insurance and public liability insurance (RPA)	√			
	54.	To develop a school buildings strategy		√		
	55.	To maintain buildings, including developing a properly funded maintenance plan		√		
Health and Safety	56.	To establish a health and safety policy	√			
	57.	To ensure that health and safety regulations are followed		√		√

Function	No	Tasks	Decision Level			
			1	2	3	4
School Organisation	58.	To set the dates of school terms and holidays		√		
	59.	To set the times of school sessions		√		
	60.	To ensure that the school meets for 380 sessions in a school year		√		
	61.	To ensure provision of free school meals to those pupils meeting the criteria		√		
Information for parents	62.	To prepare and publish the school prospectus		√		
	63.	To maintain the school website to ensure compliance with all legislative requirements		√		
	64.	To approve a complaints procedure	√			
	65.	To adopt and review home-school agreements		√		
Governance	66.	To appoint (and remove) the chair of the LGB	√			
	67.	To appoint and dismiss the clerk to the LGB	√			
	68.	To hold a full LGB meeting at least three times in a school year		√		
	69.	To appoint and remove members of the LGB, other than staff and parent governors	√			
	70.	To arrange for the election of parent and staff governors by parents and staff respectively		√		
	71.	To maintain a Register of Governors' Business and Pecuniary Interests		√		

Function	No	Tasks	Decision Level			
			1	2	3	4
	72.	To approve and set up a governors' Expenses Scheme		√		
	73.	To consider whether or not to exercise delegation of functions to individuals		√		
Safeguarding	74.	To approve a safeguarding policy		√		
	75.	To ensure that the safeguarding policy is implemented and safer recruitment procedures are followed		√		
	76.	To maintain a single central record of recruitment and vetting checks				√
Policies	77.	To determine those policies which will be developed by the Trust and mandatory for all Trust Academies	√			

Date last reviewed 11.10.23