Trust Master Scheme of Delegation 2025-2026

This scheme of delegation will be reviewed annually by the Trust board, together with all terms of reference.

The board may choose to remove certain delegated functions as it sees fit if a schools performance is not at least good in all areas. A revised scheme of delegation will be issued for each school in these circumstances. Once performance is improved autonomy will be earned back to the level detailed in the delegation matrix below.

Delegation Matrix

Key to levels of delegation

Level 1: ACT: Trust Board or Members (B= Full Board, F = Finance Audit and Risk Committee, E = ECM Committee, M= Members)

Level 2: Trust executive: CEO, CFO etc

Level 3: Local Governing Board (assumes headteacher is part of the LGB)

Level 4: Headteacher

The *Scheme of Delegation 2025–2026* is a high-level document outlining the responsibilities delegated to Headteachers within the ACT Trust. It reflects updates introduced in the ATH 2025 Additions, which are highlighted throughout the document. These additions represent new or revised responsibilities aligned with evolving Trust priorities and statutory requirements.

This document serves as an overview, not a comprehensive guide. It is supported by supplementary documents that provide detailed role descriptions and governance expectations for:

Headteachers – operational leadership, school improvement, and compliance.

Local Governing Bodies (LGBs) – monitoring, challenge, and community engagement.

Executive Leadership Team (ELT) – strategic oversight and support across schools.

Trust Board – ultimate accountability, risk management, and strategic direction

Together, these documents form a coherent governance framework, ensuring clarity of roles, accountability, and alignment with the Trust's vision for high standards and continuous improvement.

Key Function	Ref	Tasks	Delegation Level				Notes
			1	2	3	4	
1. Vision, ethos and strategic direction	1.1	Setting and safeguarding an **ethos** of high expectations for the trust	B	✔			The ethos of the trust will be set, communicated and monitored across the trust by trustees with support from the CEO. LGBs to ensure the ethos of the academy supports/embraces the ethos of the trust. Trustees should monitor the ethos across the trust
	1.2	Set the Christian vision/mission for the trust	B	✔			Set the Christian vision for the trust
	1.3	Setting and monitoring the **vision** for the trust	B	✔			Ensure there is a 3-5 year vision for the trust, that is shared with all stakeholders. The vision for each academy should complement this.
	1.4	Setting and monitoring **strategic direction** for the trust	B	✔			Ensure there is a 3-year high level strategic plan to achieve the vision and KPIs to monitor and evaluate progress across the trust
	1.5	Setting and monitoring **annual improvement plan** for the trust	B	✔			Ensure there is an annual strategic improvement plan for the trust that reflect the vision and sets targets for trust KPIs. The plan must contain SMART targets that trustees can monitor/gather evidence of in order to hold to account. Gathering data trust wide to monitor and evaluate trends and impact of improvement
	1.6	**Stakeholder engagement** for the trust	B	✔	✔		Ensure that all stakeholders have a voice across the trust and their views are an input into the strategic direction of the trust. Communicate with stakeholders as a trust. Annual stakeholder listening.
	1.7	Identifying and monitoring **risks** for the trust	F	✔			Ensure there is a risk management plan that is updated and monitored termly in order to mitigate and manage risks for the trust. Keep the risk profile of the trust under review, together with the Business Continuity Plan.
	1.8	Setting and safeguarding the **ethos** of the academy		✔	✔	✔	Ensure the ethos reflects the ethos of the trust and is clear and understood by all stakeholders. This should reflect British values and show high aspiration for all and embody the Christian vision for the trust.
	1.9	Setting and monitoring the **vision** for the academy		✔	✔	✔	Lead the creation of a shared vision that complements the trust vision. Ideally for 3-5 years. It should be clear to stakeholders from this the direction of travel for the school.

Key Function	Ref	Tasks	Delegation Level				Notes
			1	2	3	4	
	1.10	Setting and monitoring **strategic direction** for the academy		✔	✔	✔	Ensure there is a 3-5 year high level plan to achieve the vision
	1.11	Setting and monitoring **annual improvement plan** for the academy		✔	✔	✔	Ensure there is an annual strategic improvement plan for the academy that reflect the vision and sets targets for academy KPIs. The plan must contain SMART targets that governors can monitor/gather evidence of in order to hold to account.
	1.12	Identifying and monitoring **risks** for the academy		✔	✔	✔	Ensure there is a risk management plan that is updated and monitored termly to mitigate and manage risks for the academy. Keep the risk profile of the academy under review, together with the academy Business Continuity Plan.
	1.13	**Listening to stakeholders** and engaging them in future direction			✔	✔	Ensure the local board listens to stakeholders and takes on board their views when making strategic decisions. This can be achieved through surveys or other listening activities

Key Function	Ref	Tasks	Delegation Level				Notes
			1	2	3	4	
2. Academy Improvement	2.1	Agreeing **KPIs** for the trust and reporting mechanisms and frequency of these	B	✔			These will be set trust wide to ensure consistency of reporting and comparison across the trust. They will be communicated across the trust by the CEO, based on recommendations of CEO and committees
	2.2	**Monitoring and holding to account** against educational performance KPIs and the annual improvement plan targets	E	✔	✔		LGBs responsible at local level, trust wide monitoring by CEO and trust board and ECM committee
	2.3	Oversight and monitoring and evaluation of the intent, implementation, and impact of the **curriculum**	E	✔	✔		LGBs responsible at local level, trust wide monitoring by CEO and trust board
	2.4	Review **MAT performance** against national averages and review trends from Inspection Data Summary Reports for academies	E	✔			Review and benchmark academies performance in the trust against national averages and challenge any under-performance
	2.5	Oversight and monitoring of **pupil behaviours**, as per agreed KPIs and targets	E	✔	✔		LGBs responsible at local level, trust wide monitoring by CEO and report to trust board
	2.6	Oversight and monitoring of **pupil personal development** as per agreed KPIs and targets	E	✔	✔		LGBs responsible at local level, trust wide monitoring by CEO and report to trust board

Key Function	Ref	Tasks	Delegation Level				Notes
			1	2	3	4	
	2.7	Review **academy performance** against national comparisons and review IDSR	E	✔	✔		Annual review and benchmarking of performance. Challenge any underperformance
	2.8	**Report** the performance of the academy against KPIs, performance targets and national averages				✔	Deliver data in the format and at the frequency agreed to enable the committees and the board to do their job
	2.9	**Deliver school improvement** in line with the agreed KPI and Performance Targets				✔	Lead academy team to meet agreed targets

Key Function	Ref	Tasks	Delegation				Notes
			1	2	3	4	
3. Quality of Education & Curriculum (including RE and collective worship)	3.1	Ensure the **national curriculum** guidelines are met and consider any disapplication	E	✔		✔	Monitor to ensure the curriculum is compliant, inclusive, and effective
	3.2	Establish **curriculum Intent and Implementation** approach	E	✔	✔	✔	Ensure that there is a clear strategy for the curriculum, its development and implementation, including accuracy of assessment, subject leadership and resource management
	3.3	**Monitor curriculum** implementation and impact		✔	✔		Monitor progress against the curriculum strategy and its impact on quality of education, progress and attainment.
	3.4	Set **assessment approach**		✔		✔	Ensure consistency and accuracy of assessment for all subjects and compliance with relevant assessment/exam legislation
	3.5	Monitor **accuracy of assessment**	E	✔	✔	✔	Review assessment results in-year and actuals v predictions
	3.6	Monitor **sex and relationship education**		✔	✔		Ensure there is a clear strategy, an up to date policy and compliance with this
	3.7	Monitor promotion of **British values and SMSC**		✔	✔		Ensure that all British values are actively promoted through the SMSC curriculum (Spiritual, Moral, Social, Cultural)
	3.8	Implement actions to maintain teaching standards and **quality of teaching**	E	✔		✔	Facilitate individual and generic support and training for all teaching staff to ensure quality first teaching which is improving over time
	3.9	Monitor **quality of teaching**	E	✔	✔	✔	Monitor trends and outcomes across the school comparing with performance management reviews (anonymised)
	3.10	Monitor impact and value for money of **CPD**	E	✔	✔		Review strategy, spend and impact of CPD and perceptions/satisfaction by staff
	3.11	Monitor provision and outcomes across the trust for **vulnerable pupils** and the impact of any other grants	E	✔	✔		Monitor all indicators – progress, attainment, attendance, behaviour etc for vulnerable pupils and the impact of the Pupil Premium plan

Ref	Tasks	1	2	3	4	Notes
3.12	Monitor the impact of the **SEND** provision and outcomes for SEND pupils across the trust	E	✔	✔		Review effectiveness of provision, budget and impact
3.13	Ensure provision of **RE i**n line with the schools curriculum strategy				✔	The headteacher must ensure this falls into line with locally agreed syllabus.
3.14	Any revision to **RE curriculum** outside trust foundation	M				A decision to be taken to the Members
3.15	Ensure that all pupils take part in a daily act of collective worship	E		✔	✔	This is the responsibility at local academy level
3.16	To make application to the advisory councils, SACRE, concerning the requirements for collective worship (schools without a religious character) to disapply (after consulting GB)	E		✔	✔	This is the responsibility at local academy level
3.17	Arrangements for collective worship in Foundation schools of religious character, VC or VA schools (after consulting head)	E		✔	✔	This is the responsibility at local academy level
3.18	Extended services and wrap-around care	F	✔	✔	✔	Each headteacher with LGB to agree strategies to provide extended services/wrap-around care, subject to a business case agreed by the board

Key Function	Ref	Tasks	Delegation				Notes
			1	2	3	4	
4. Finance and assets	4.1	Agree funding model across the trust	F				Agree the funding model and communication of this
	4.2	Recommend the academy budget and any revisions to this to the trust board			✔	✔	Recommend a budget that represents value for money, and facilitates the agreed strategy for the academy
	4.3	Determine and allocate trust central services	F	✔			Provide clarity on central services and any SLAs. Monitor effectiveness and value for money
	4.4	Approve academy budgets and the overall trust budget for the year	B/F	✔			Detailed discussions at Finance Committee and recommendation to board
	4.5	Monitor monthly trust income, expenditure, cash flow and other financial reports against budget plans	F	✔			Review actual spend against budget and hold to account
	4.6	Termly monitoring of academy income and expenditure against plans		✔			Review presented financial data/financial KPIs and respond to any direction from the CFO

	Ref	Task					Notes
	4.7	Termly monitoring of academy trading accounts		✓			Review trading accounts for clubs, breakfast club, catering etc
	4.7	Ensure compliance with Academy Trust Handbook	F				Monitor financial compliance
	4.8	Review value for money and benchmark spending and impact of spend	F	✓			Use benchmarking tools/information to challenge budget spend effectiveness. Review staffing model and impact
	4.9	Set and monitor procurement policies and processes trust wide	F	✓			The Trust is responsible for setting and overseeing procurement policies and processes across all academies to ensure **value for money, legal compliance, and consistency**. This includes: • Establishing clear procurement procedures and thresholds. • Ensuring all purchasing decisions follow public sector procurement regulations. • Monitoring procurement activity across schools to ensure adherence to Trust-wide standards. • Providing guidance and support to schools on approved suppliers, tendering, and contract management. This function is **fully retained by the Trust Board**, ensuring central oversight of financial probity and risk management.
	4.10	Ensure procurement procedures are followed and robust	F	✓			Audit compliance and monitor management to avoid fraud or error
		Monitor renewal of academy contracts, controlled via an academy contracts register		✓			Termly review of the contracts register to review any contracts due for renewal, ensuring best value is obtained
	4.11	Ensure value for money procurement across the trust	F	✓			Identify areas for improved financial effectiveness and recommend improvement strategies
	4.12	Review and approve trust wide contracts within procurement policy	F	✓			Ensure contracts represent value for money and are tendered as appropriate
	4.13	Complete audit functions and report financial scrutiny to ESFA	F				Ensure compliance with audit requirements and financial scrutiny requirements
	4.14	Agree and monitor trust asset and premises plans and management of these	F	✓			Identify risks and works/investment required and budget accordingly. Comply with DfE Estate management guidance.
		Ensure asset management plans are in place and monitored appropriately		✓		✓	Each academy should have an asset management plan in accordance with the financial regulations.
	4.15	Review of staffing structures	F	✓	✓	✓	Review value for money and impact of staffing structures

Key Function	Ref	Tasks					Notes
	4.16	Monitor pupil numbers and staff ratios	F	✔	✔	✔	Looks at trends, fluctuations, and stability
	4.17	Approve and oversee compliance with financial regulations, including insurance requirements	F	✔			Set, communicate and monitor compliance with financial regulations and monitor corrective actions are completed, including trust insurance
	4.18	Agree foci for internal audit	F	✔			Agree foci of the internal audit for the year and the reporting timetable
	4.19	Review feedback from internal audits and monitor implementation of actions	F	✔			Review internal audit reports and ensure actions are addressed
	4.20	Set a trust reserves policy and monitor compliance with this	F	✔			Monitor reserves as part of monthly financial reporting
	4.21	To establish a charging and remissions policy for the academy		✔			Follow any trust-wide standards on this.
	4.21	Appoint internal auditors	F/B	✔			FAR committee to recommend internal auditors to the board
	4.22	Appoint external auditors	B/M	✔			Board to recommend to Members the appointment of external auditors for the Members to approve
	4.23	AGM	B/M	✔			Hold an Annual General Meeting to discuss the annual accounts with Members and agree the external auditors.

Key Function	Ref	Tasks	Delegation				Notes
			1.	2.	3.	4.	
	5.1	Appointment of CEO	B				Agree process and requirements and ensure safer recruitment practices (recruitment panel)
	5.2	Performance management, discipline and dismissal of CEO	B				Ensure clarity of role profile, annual performance targets and expectations. Monitor and hold to account. Refer to policies
	5.3	Appointment of Headteacher/head of school	B	✔	✔		Agree process and requirements and ensure safer recruitment practices (selection panel)
5. HR	5.4	Appointment of senior staff at an academy		✔	✔	✔	A LGB member may be on the panel for SLT member recruitment only
	5.5	Performance management of headteachers	F	✔	✔		Ensure clarity of role profile, annual performance targets and expectations. Monitor and hold to account. Managed locally, Finance committee to have oversight
	5.6	Discipline and dismissal of headteachers	B	✔			Refer to policies
	5.7	Appointment of trust staff	B	✔			Agree process and requirements and ensure safer recruitment practices. Board involvement for directors only

Ref	Tasks					Notes
5.8	Performance management of trust staff	F	✔			Ensure clarity of role profile, annual performance targets and expectations. Monitor and hold to account. Finance committee to approve
5.9	Discipline and dismissal of trust staff	F	✔			Refer to policies.
5.10	Appointment of academy staff		✔		✔	Agree process and requirements and ensure safer recruitment practices, following guidance from the HR/CFO director in consultation with CEO
5.11	Performance management, discipline and dismissal of academy staff			✔	✔	Ensure clarity of role profile, annual performance targets and expectations. LGB to monitor and hold to account. Refer to policies
5.12	Approval of pay awards and oversight of performance management	F	✔	✔	✔	Reviewed by local board and recommended to trust. Finance committee to have oversight for consistency and final approval
5.13	Setting trust wide HR policies	F	✔			Ensure clarity, communication, compliance and effectiveness
5.14	Set terms and conditions of employment and approve staff handbook	F	✔			Ensure clarity, communication, compliance and effectiveness
5.15	Hear pay appeals	F		✔		Trust board to agree process and relevant trustees/governors to sit on panel with reference to the policy
5.16	Hold disciplinary panels	F		✔		Trust board to agree process and relevant trustees/governors to sit on panel with reference to the policy
5.17	Handle grievances	F		✔		Trust board to agree process and relevant trustees/governors to follow this with reference to the policy
5.18	Make staff adjustment decisions	F	✔	✔	✔	Involve appropriate parties to explore options. Oversight by Finance Committee
5.19	Monitor staff wellbeing and workload	F	✔	✔	✔	Ensure compliance with latest guidance on staff workload and monitor staff wellbeing
5.20	Performance management of the trust governance professional	B				Ensure clarity of expectations, role profile and performance management
5.21	Develop and monitor impact of CPD strategies and sharing of best practices across all trust schools	E	✔		✔	Facilitate the development of trust staff Monitor impact and costs Ensure all staff are trained on all areas of statutory compliance relevant to their role

Key Function	Ref	Tasks	Delegation			Notes
	6.1	Approve and monitor trust wide policies	all ✔			Ensure all statutory policies are set, communicated and adopted as appropriate by academies and on trust/school websites as applicable

Key Function	Ref	Tasks	Delegation				Notes
6. Statutory Compliance	6.2	Ensure all statutory policies are up to date and implemented	all	✔	✔	✔	Monitor changes to statutory policies, review and adopt and monitor compliance
	6.3	Approve and monitor academy policies			✔	✔	Monitor policies, review and update when required and ensure they embody the ethos of the academy
	6.4	Ensure compliance with safeguarding and safer recruitment legislation through an annual audit and report termly to board	B	✔	✔	✔	Safeguarding governor(s) to meet termly with Designated Safeguarding Lead and to complete termly monitoring and reporting to the board on activity and compliance
	6.5	Monitor compliance with health and safety legislation across the trust	F	✔	✔	✔	Board - Ensure compliance with health and safety legislation across the trust LGB – monitor compliance with H&S policies
	6.6	Approve an annual admissions policy	B	✔	✔	✔	Ensure policy is fit for purpose and set in a timely fashion. Consult as necessary
	6.7	Approve and monitor collective worship and SRE			✔	✔	Ensure compliance with regulations and local policy
	6.8	Approve school organisational matters, such as the timing of the school day, inset days, school meals etc		✔	✔	✔	Agree timetable for this work, review cycle and monitoring. CEO to ensure these are coordinated
	6.9	Ensure compliance with academy/trust website requirements	F	✔	✔	✔	Audit the academy website annually to ensure compliance – LGB Oversight of trust website for compliance
	6.10	Ensure compliance with data protection, GDPR and FOI	B	✔			Monitor and report any issues
	6.11	Approve 4 year equality plan and monitor progress	B	✔	✔		Trust board to set equality objectives for the trust and each academy to adopt a localised version. Monitor progress against the plan
	6.12	Ensure compliance with charity law and company law	B	✔			Trustees with support from the CEO and central trust team
	6.13	Ensure compliance with SEND regulations	E	✔	✔	✔	SEND governor(s) to monitor SEND provision and budget and impact. Hold to account.
	6.14	Ensure compliance with requirements related to vulnerable pupils and Pupil Premium	E	✔	✔	✔	Ensure a pupil premium plan is written, approved and posted on the school website each autumn term and the impact is monitored during the year.
	6.15	Ensure compliance with Looked After Children regulations	E	✔	✔	✔	Looked after children governor to meet regularly with nominated member of staff to monitor the provision and impact for this group
	6.16	Complying with exclusion legislation and policy	E	✔	✔	✔	Ensure that the Behaviour Policy and Exclusion Policy are up to date, fit for purpose and being followed. Ensure they are consistent with the ethos of the academy/trust. Hold exclusion panels as required.

Key Function	Ref	Tasks	Delegation				Notes
	6.17	Compliance with exam management regulations	E	✔	✔	✔	Ensure all exam management follows regulations.
	6.18	Ensure compliance with complaints procedures and whistleblowing regulations	B	✔	✔	✔	Ensure complaint procedures are up to date, effective and followed. Ensure that staff are aware of how to whistleblow
	6.19	Compliance with healthy school meal requirements	F	✔	✔	✔	Monitor by LGB as part of health and safety. Standards set across the trust by the board

Key Function	Ref	Tasks	Delegation				Notes
			1.	2.	3.	4.	
7. Governance Practices	7.1	Recruitment and appointment of members	M				Ensure all member positions are filled and new members are inducted into the role, sign a code of conduct and understand expectations/role. (see Articles of Association)
	7.2	Recruitment and appointment of trustees	M/B				Ensure all trustee positions are filled and new trustees are inducted into the role, sign a code of conduct and understand expectations/role. (See Articles of Association)
	7.3	Recruitment and appointment of chairs of LGBs	B		✔		Identify candidates or review recommendations/applications for Chairs of LGBs, sign a code of conduct and understand expectations/role (See Articles of Association)
	7.4	Recruitment and appointment of local governors			✔		Ensure all governor positions are filled and new members are inducted into the role, sign a code of conduct and understand expectations/role.
	7.5	Recruitment and appointment of clerk(s)	B				Define the role description and follow transparent recruitment processes
	7.6	Skills audit and identifying skills gaps/deficiencies	B		✔		Annually review skills against the appropriate governance competencies and develop a strategy to fill any gaps or improve competencies
	7.7	Self-review, hold to account and governance development plan	B		✔		Review effectiveness and impact of the board and develop a strategy to improve
	7.8	Approve and review scheme of delegation	B				Ensure scheme of delegation is clear, up to date and followed
	7.9	Terms of reference for all committees	B				Ensure terms of reference for all committees are clear, up to date and followed
	7.10	Establish member/trustee/governor code of conduct	B				Ensure a code of conduct exists for all levels of governance and uphold the standards set

Key Function	Ref	Tasks	Delegation				Notes
			1.	2.	3.	4.	
	7.11	Create and maintain register of business interests	B		✔		Ensure a register of business interests is created, up to date and published on the academy site
	7.12	Set governance expectations through terms of reference for committees and role profiles for specific governance roles	B				Set expectations and hold all to account to govern in line with these. Minimum LGB roles – Safeguarding, SEND, Vulnerable Pupils, H&S, EYFS
	7.13	Planning governance activities including monitoring and meetings	B	✔	✔	✔	Ensure all governance activities are planned, resourced and delivered in a timely fashion.
	7.14	Ensuring meetings are well organised, impactful and well minuted	B		✔		Create an annual meeting calendar, plan agendas and manage meeting to be impactful and efficient. Ensure minutes reflect the richness of discussion and decisions/actions agreed.
	7.15	Ensure compliance with governance transparency requirements	B	✔	✔	✔	Ensure governance information is up to date on the trust website and that GIAS is up to date