

		Trust							School		
A: Accountable (and approver). Answerable for task being delivered. One per task. R: Responsible for delivery of the task. Can be more than one individual / group responsible. C: Needs to be involved before the decision is made. I: Needs to be informed.		Members	Board of Trustees	Pay Committee	ACR Committee	Governance Professional	Acc Officer / CEO	Chief Finance Officer (CFO)	Local Advisory Board	Clerk	Head Teacher
1	Governance										
1.1	Appoint and remove Members	A / R									
1.2	Appoint Trustees	A / R	R								
1.3	Remove Trustees	A / R									
1.4	Elect and remove Chair and Vice Chair of Trustees		A / R								
1.5	Establish and review trust governance structure		A / R			C	C		C	C	
1.6	Appoint and remove Board committee chairs		A / R								
1.7	Appoint Trustees and external members to Board Committees annually		A / R								
1.8	Agree lead trustees for safeguarding and other roles		A / R								
1.9	Approve composition of Local Advisory Board (within BoT approved framework)								A / R		
1.10	Appoint Local Advisory Board members		A						R	R	
1.11	Remove Local Advisory Board members		A / R								
1.12	Appoint Local Advisory Board chairs and vice chairs								A / R		
1.13	Remove Local Advisory Board chairs and vice chairs		A / R								
1.14	Appointing to Local Advisory Board lead roles (inc safeguarding & finance)								A / R		
1.15	Appoint Governance Professional		A / R				C				
1.16	Appoint Local Advisory Board clerking arrangements								A / R	C	
1.17	Articles of Association: review	A / R	R								
1.18	Articles of Association: approve	A / R									
1.19	Agree Committee and Local Advisory Board terms of reference and scheme of delegation		A / R				C				
1.20	Complete annual review of governance / scheme of delegation		A / R				C				
1.21	Complete annual trust board self-review		A / R								
1.22	Complete annual Local Advisory Board self-review								A / R		
1.23	Complete annual skills audit		A / R						R		
1.24	Publish governance arrangements on trust/schools' websites					A / R				A / R	
1.25	Prepare annual report on the performance of the trust for the AGM		A / R				R				
1.26	Commission external reviews of governance (Trust and / or Local Advisory Board(s))		A / R								
1.27	Approve trust's vision, strategy and key priorities		A / R				R				
1.28	Approve schools' vision, strategy and key priorities						C		A / R	R	
1.29	Determining whether other school(s) should join the trust		A				R	C		C	
1.30	Whether to apply to DfE for a Significant Change		A				R	C	C	R	
1.31	Whether to apply to DfE for a land transaction		A				R	C	C	R	
2	Staff										
2.1	Appoint, suspend and dismiss CEO/Accounting officer		A / R								
2.2	CEO's performance management and pay		A / R								
2.3	Appoint, suspend and dismiss Chief Finance Officer		C				A / R				
2.4	CFO's performance management and pay		C				A / R				
2.5	Appoint Head Teacher						A / R		C		
2.6	Appoint Deputy Head						C		C	A / R	
2.7	Appoint Assistant Head						C			A / R	
2.8	Appoint TLR postholders									A / R	
2.9	Appoint teaching staff									A / R	
2.10	Appoint senior support staff (Grade 7 and above)							C		A / R	
2.11	Appoint support staff (Grade 6 and below)									A / R	
2.12	Agree trust staffing structure (central team)		A				R	C			
2.13	Agree school staffing structure						A	C		R	
2.14	Headteacher's Performance Management & pay recommendation						A / R		C		
2.15	School Performance Management & pay recommendations						A / R			A / R	
2.16	Central team performance management and pay recommendations						A / R				
2.17	Determine contractual terms and conditions		A				R	C		C	
2.18	Pay decisions (besides CEO)			A			R	C			
2.19	Implement HR policies - for CEO		A / R								
2.20	Implement HR policies - for central team		A				R				
2.21	Implement HR policies - for school staff		A				C			R	
2.22	Cost of living increase (if applying national award with no trust policy decisions required)						A / R	C			
2.23	Cost of living increase (if trust policy decisions required)		A				R	C		C	
2.24	Leadership group pay ranges / TLR values for a school						A	C		R	
3	Education provision										
3.1	Approve a trust curriculum approach / strategy						A / R				
3.2	Approve the curriculum of a school								A	R	
3.3	Monitor and develop / implement strategies to improve quality of teaching						R	I		A / R	
3.4	Develop, implement and monitor strategies to improve pupil progress and outcomes						R	I		A / R	
3.5	Monitor and develop / implement strategies to improve pupil attendance						R	I		A / R	
3.6	Monitor and develop / implement strategies to improve pupil behaviour						R	I		A / R	
3.7	Monitor and develop / implement strategies to improve staff retention, recruitment, and development						A / R	I		R	
3.8	Monitor and develop / implement strategies to improve staff attendance and well-being						R	I		A / R	
4	Finance and procurement										
4.1	Appoint External Auditors after procurement		A						R		
4.2	Reappoint external auditors (subject to performance) for up to 4 further years				A				R		
4.3	Remove External Auditors		A / R								
4.4	Appoint and remove Internal Auditors				A				R		
4.5	Receive External Auditor report		I	A / R							
4.6	Monitor implementation of External Auditor recommendations		A				R				
4.7	Determine Internal Audit programme				A / R						
4.8	Receive Internal Auditor report and monitor implementation of recommendations				A / R						
4.9	Trust's scheme of financial delegation: establish, monitor and review		A				R	R			
4.10	Approve assumptions for next budget		A				R	R		C	
4.11	Prepare budget						A	R		R	
4.12	Approve budget (including in-year variations that require the use of reserves to fund increased expenditure)		A				R	R			
4.13	Monitor in-year finance position		A				R	R		R	
4.14	Prepare annual report and accounts						A	R			
4.15	Approve annual report and accounts		A / R								
4.16	Submit required returns (ESFA, Companies House etc)		A					R			
4.17	Approve financial procedures		A				R	R			
4.18	Implement financial procedures, and recommend improvements						A	R		R	
4.19	Undertake financial benchmarking						A	R			
4.20	Ensure adequate insurance cover is in place						A	R			
4.21	Check & clarify monthly salaries							A / R		R	
4.22	Approve payment of salaries							A / R			
4.23	Future strategy for delivery of services that could be in-house or contracted out		A				R	R		C	
4.24	Lead procurement of trust wide, high value or high risk contracts						A	R		C	
4.25	Banking and investment strategy and accounts		A				R	R			

Implementation includes undertaking formal action in accordance with the policy, which may include dismissal.

4.26	Approving use of a projected in-year underspend where approved budget did not require use of reserves					A	R			R
4.27	Approving use of a projected in-year underspend where approve budget did require use of reserves	A				R	R			R
4.28	Approving any leaving payments in excess of trust policy or ESFA thresholds	A				R	C			C
4.29	Reviews of significant suppliers						A			
5	Documentation									
5.1	Determine, approve, and review trust-wide policies	A/R								
5.2	Develop trust-wide policies					A	R			R
5.3	Develop school policies					C				A/R
5.4	Approve school policies					C		A/R		R
5.5	Ensure implementation of policies (central team)					A/R				
5.6	Ensure Implementation of policies (school)					C				A/R
5.7	Maintain schedule for review of trust-wide policies	A				R				
5.8	Maintain schedule for review of school policies							A		R
5.9	Maintain contract register - trust contracts	A					R			
5.10	Maintain contract register - school contracts						A			R
5.11	Maintain Register of Business Interests - Members, Trustees and trust leaders					A/R				
5.12	Maintain Register of Business Interests - Local Advisory Board and school leaders								A/R	
5.13	Prepare Trust Development Plan and Self Evaluation Form (SEF)					A/R	C			C
5.14	Approve Trust Development Plan and SEF	A/R								
5.15	Prepare School Development Plan and SEF					C				A/R
5.16	Approve School Development Plan							A/R		
5.17	Maintain trust risk register			A		R	R			
5.18	Maintain school risk register					A	R			R
6	Marketing and communications									
6.1	Trust logo and branding	C				A/R				C
6.2	Trust website	I				A	R			
6.3	School logo and branding					C	C	C		A/R
6.4	School website					I		I		A/R
6.5	Approve stakeholder engagement strategy - trust-wide					A/R		C		C
6.6	Approve stakeholder engagement detail - school specific							A		R
6.7	Manage staff and parent voice processes									A/R
7	Practicalities									
7.1	Approve school uniform					C		I		A/R
7.2	Approve timings of school day					C		I		A/R
7.3	Approve term dates					A/R				C
7.4	Approve inset days / approach					A/R				R
7.5	Arrangements for lettings / community use of school facilities					C	C			A/R
7.6	Admissions: Approving the Statement of Provision							A		R
7.7	Admissions: Determining whether school can meet need / offer a place					I				A/R
7.8	Admissions: objecting to an EHCP naming the school					C				A/R
7.9	Admissions: Submitting information to Tribunal	A				C				A/R
7.10	Exclusions: fixed term exclusion decision					C				A/R
7.11	Exclusions: permanent exclusion decision	I				C		I		A/R
7.12	Exclusions: Appeal against permanent exclusion decision					C		A/R		
8	Compliance									
8.1	Monitoring of complaints (themes, lessons learned etc)	A				R		R		R
8.2	Health & Safety Compliance	A					C			R
8.3	Safeguarding Compliance	A				R	C			R
8.4	Employment Compliance	A				R	C			R
8.5	GDPR / data protection compliance	A				R	C			R
8.6	Ensure trust website is compliant and effective					A	C			
8.7	Ensure school websites are compliant and effective					A	C			R
8.8	Staffing roles compliance (ie SENDCo, teacher for LAC etc)					R				A/R
9	Infrastructure									
9.1	IT infrastructure, equipment, application, usage monitoring					A	R			C
9.2	Capital project reviews					A	R			C
9.3	Develop and monitor Estates Strategy	A				R	C			C
9.4	Develop and monitor IT Strategy	C				A/R	C			C