Orbis Education Trust Scheme of Delegation - Adopted on [Date]	
	The individual/group that:
Responsible (R)	*Has responsibility for undertaking or completing the task delegated to them and reporting on its delivery at suitable intervals. In the case of the CEO, this reporting will be at Board level. In the case of the Principal/Head, this will be at Academy LGB level.*
Accountable (A)	*Has the ultimate or final responsibility for ensuring completion of the task. This will include determining how the Trust and/or Academies (as appropriate) should undertake the task including determining appropriate milestones and targets to be reported against.*
Supports (S)	*Should provide support during the implementation of the task.*
Consulted (C)	*Should be consulted as part of the process of the completing the task because they can provide*
Informed (I)	*Should be kept up-to-date about the progress of the task and/or the decisions in the task.*

		Role				
		Members	**Trustees**	**CEO/Executive Headteacher**	**LGB**	**Headteacher**
Strategy and Leadership						
Strategy	Set strategic objectives of the Trust		A/R	S	S	C
	Set strategic objectives of the Academies		A	S	R	S
	Develop the character, mission & ethos of the Trust		A/R	S	C	C
	Develop the character, mission & ethos of the Academies		A	S	R	S
Scrutiny	Scrutiny: Performance – review & challenge progress of the Trust against its strategic objectives and KPIs		A	R	C	S
	Scrutiny: Ethos – operation of the Trust & Academies against the agreed character, mission & ethos		A	R	C	S
Compliance	Compliance: Funding Agreement – comply with all obligations including the Academies Financial Handbook		A	R	S	R
	Compliance: Regulatory – with all regulations affecting the Trust (including all charity law, company law, GDPR, employment law and health and safety)		A	S	R	S
	Compliance: 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		A	R	S	S
	Compliance – completing the register of business interests and put in place a procedure to deal with any conflicts of interest and connected party transactions		A	R	R	S
Registers	Register of Interests		A/R		A/R	
	Trust Risk Register		A	R	S	S
Appointments	Appointment and removal of Trustees– ensuring processes in place for appointment and removal of trustees (including ensuring that the Trustees have the skills to run the Trust)	A	R	S		
	Appointments of Governors – ensuring processes in place for appointment of governors (including ensuring that the Governors have the skills to run the Academies)		A/R		C	S
	Appointment of Clerk – Trust Board		A/R	S		
	Appointment of Clerk – Governing Body		C	C	A/R	S
Policies	Review and approval of Trust Wide Policies (including admissions, DBS, charging and remissions policies, health & safety and safeguarding)		A	R	C/S	S

Committee Delegations	Prepare terms of reference for LGB's and Committees		A/R	S	C	C
Training	Training programme for trustees		A/R	S		
	Training programme for governors		C		A/R	S
Education and Leadership						
Academy Performance	Academy Development Plan - for each Academy in line with strategic aims of the Trust		A	R	C	S
	Key Performance Indicators – setting and reviewing performance of the Trust & the Academies		A/R	S	C	I
	Quality of Teaching - ensuring appropriate levels of support, challenge and intervention to support delivery of education outcomes		A/R	S	C	C
	Curriculum – setting the curriculum for the Academies and reviewing its effectiveness		A	S	R	S
Student Issues	Student issues (including attendance, exclusions, punctuality and disciplinary matters for each Academy)		C	C	A	R
	Ensure school lunch provided to appropriate nutritional standards			S	A	R
Safeguarding	Ensuring each academy has appointed a designated safeguarding lead, ensuring compliance with statutory guidance and maintenance of single central record		A	S	R	S
Stakeholder Engagement	Promoting partnership working between parents/carers and the Academies (including undertaking consultation with students, parents/carers and other stakeholders and ensuring that such feedback is used to support the development of best practice and to promote the quality of the overall student experience)		A	S	R	S
Academy Calendar and Opening Hours	Setting term dates		A	S	R	S
	Academy Hours -setting the opening and closing times for the Academies		A	S	C	R
Admissions	Set admissions policy		A/R	S	I	I
	Admissions Decisions		C	I	R	S
Ofsted	Ofsted Inspections Trust Support: (1) Board will liaise with Ofsted where MAT is inspected and will assist with an Academy inspection. (2) CEO will ensure Trust is prepared for inspection and manage the process from a Trust perspective where the impact of the Trust is under review (3) CEO will support LGBs and Principals/Headteachers for individual Academy inspections		A/R	S	I	I
	Ofsted Inspections: Academy Level		A	S	R	R
Financial						
Appointments	Appointment of Audit and Risk Committee		A/R	S	I	I
	Appointment of Accounting Officer and Chief Financial Officer		A/R			
	Recommend appointment of External Auditors to Members		A/R	S		
	Appointment of Internal Auditors		A/R	S		
	Agreeing a funding model across the Trust and develop an individual funding model for the Academies) so as to the secure the Trust's financial health in the short term and the long term		A/R	S	R	R

Category	Activity					
Funding Model and Budget	Formulating and setting the Trust wide budget		A/R			
	Formulating and determining the proportion of the overall budget to be delegated to each Academy (including uses of contingency funds/ balances)		A/R	S		
	Expenditure and ensuring delivery of Annual Budgets		A/R	S		
Financial Delegation	Establishing of policies and procedures to ensure compliance with the Trust's financial and reporting requirements		A/R	S	C	S
Investments	Agreeing the investment policy in line with the Academies Financial Handbook and the Scheme of Financial Delegation		A	R		
HR and Operations						
Appointments	Appointment of CEO		A/R			
	Appointment of Principals/ Heads at each Academy		A	R	C	
	Appointment of cross-Trust staff (in line with recruitment policy)		C	A/R	I	
	Appointment of Academy SLT (excluding Headteacher)			S	A	R
	Excluding SLT and Principal/ Head)				A	R
Dismissals	Dismissing CEO (in accordance with the Trust disciplinary and capability policies)		A/R		I	
	Dismissing cross Trust Staff (in accordance with the Trust disciplinary and capability policies)		C	A/R	I	
	Dismissing Headteachers (in accordance with the Trust disciplinary and capability policies)		A	R	S	
	Dismissing all other staff (in accordance with the Trust disciplinary and capability policies)			S	A	R
	Excluding SLT and Principal/ Head)				A	R
Policies and Terms & Conditions	Establishing Trust wide HR Policies (including recruitment , discipline, capability, grievance and absence policies) in accordance with all appropriate regulations		A	R	C	
	Setting Terms and Conditions of Employment and Staff Handbook		A	R	I	I
	Setting Appraisal Performance Management Policy together with pay reviews (in line with the Trust's pay policy and all statutory regulations)		A	R	C	S
	Reviewing discipline and grievance policy		A/R	R	S	I
Procurement	Setting trust wide procurement policies (for suppliers including auditors, HR and payroll providers and solicitors) in accordance with the Funding Agreement, Academies Financial Handbook and the Trust's procurement policy		A	R	R	I
	Setting academy specific procurement policies - in accordance with the Funding Agreement, Academies Financial Handbook and the Trust's procurement policy			C	A	R
	Enter into contracts – up to limit of delegation set out in Scheme of Financial Delegation			C	A	R
Central Services	Determining and allocating central services provided to the Academies by the Trust		A	R	C	I
	Overseeing the effectiveness of services provided centrally by the Trust		A	R	C	C
	Arranging insurance for the Trust		A	R		

			A	R	C	
	Acquiring and disposing of Trust land		A	R	C	
	Changing use of Assets		A	R	C	
Premises and Assets	Asset and Premises Maintenance Strategy – determining use of Academies' premises and ensuring premises are adequately maintained		S	A/R	C	I
Media and PR	Media and PR - overseeing public relations activities to project the activities of the Trust and the Academies to the wider community		A	R	S	S
	Information management – including adopting and following policies for information security and compliance with FoI and DPA legislation and maintaining accurate records (staff, student)		A	R	S	S