



Scheme of Delegation - The Inspire Multi Academy Trust (South West)

Function	Members	Trustees	Executive Team	Shared Local Governing Board	Headteacher
Strategic Direction & Development	To set the vision for the Trust	To adopt a 3-5 year Strategic Plan for the Trust	To produce a 3-5 year Strategic Plan for the Trust		
			To prepare annual updates on the Strategic Plan		
			Support the preparation of academy strategic plans which reflect the Trust's vision but at a local level	To monitor the academy Strategic Plan	To prepare an academy Strategic Plan
		Trust Board to review and agree any proposals for new academies	To negotiate new additions to the MAT	To be made aware of new additions	To be made aware of new additions
Function	Members	Trustees	Executive Team	Shared Local Governing Board	Headteacher
Governance, Reporting & Compliance	To agree and review the Articles	To be consulted on any change to the Articles	To be aware of changes	To be informed of any change	To be informed of any change
	To appoint and remove Members	To be advised of changes to membership	To be advised of changes to membership	To be advised of changes to membership	To be advised of changes to membership
	To appoint and remove Trustees (inc the chair)				
		To remove, if required, the chair of the Shared Local		To appoint and remove the Chair of the Shared Local	
				To appoint and dismiss the clerk to the Shared Local Governing Board	
		To remove any local governors		To seek, appoint, elect and remove members of the Shared Local	
		To adopt the scheme of delegation (SoD) for governance and review annually	To recommend a scheme of delegation for governance	To deliver all aspects of local governance as set out in the SoD	
		To adopt a governance handbook	To compile and review a governance handbook	To use the governance handbook as part of a local governor's induction	
		To agree an annual local governance management plan	To prepare an annual governance management plan	To hold 6 meetings as set out in the local governance management plan	To support requests for information by the Shared Local Governing Board
				To appoint local governors to champion Safeguarding, SEND, LAC, PP and H&S, English and Maths (and in Primary EYFS and in secondary Post 16)	
		To meet publishing requirements about the membership of the Trust Board and Shared Local Governing Boards (website and GIAS)	To ensure a register of Trustees and local governors is drawn up and maintained	To provide information to the Trust Board clerk on membership and to publicise membership, attendance and pecuniary interests on the academy website	
			To maintain an overview of the Shared Local Governing Board skills, recruitment,		
		To ensure succession planning for Trustees		To ensure succession planning for local governors	
		To ensure Members receive an annual report on the work of the Trust	To prepare an annual report of the work of the Trust		
		To be advised by the CEO on the effectiveness of local governance	To monitor the work of the Shared Local Governing Boards		
					To report to the Shared Local Governing Board on academy
		To be legally accountable for all data protection legislation and good practice	To ensure compliance for all data protection legislation and good practice	To monitor the Trust policy at academy level	To comply with Trust policy
	To be legally accountable for Company and Charity Law, Education law and Funding Agreements	To ensure compliance of Company and Charity Law, Education law and Funding Agreements	To meet all aspects of the scheme of delegation		
Function	Members	Trustees	Executive Team	Shared Local Governing Board	Headteacher
Trust Continuous Improvement		To set and monitor the Trust Improvement Plan. To hold the CEO to account	To provide information to Trustees on the performance of the academies across the Trust	To maintain an overview of how the Trust works	To be aware of the academy's contribution to the Trust Improvement Plan
			To review each Academy's Improvement Plan	To monitor the Academy Improvement Plan	To set, with the Executive Team, the Academy Improvement Plan
			To set the review and evaluation cycle for each academy	To visit school to learn about how school collects and uses data	To meet the review and evaluation cycle expectations
		To adopt the Trust SEF	To prepare a Trust SEF		To contribute to the Trust SEF
			To prepare with the headteacher the academy SEF	To monitor the academy SEF	To complete the academy SEF
		To be advised by the CEO of the academies' readiness for Ofsted	To support Ofsted readiness	To be prepared for Ofsted and have evidence of effective local governance for scrutiny	To deliver a good or outstanding education
		Set and monitor Trust KPIs	Ensure KPIs are measured and met		To contribute to KPI achievement
		To set academy KPI (high level)	To prepare and monitor Academy KPIs (high level)	To monitor and hold academy to account for achieving KPIs	To support the monitoring and achievement of academy KPIs
			To monitor academy KPI (low)	To monitor and hold academy to account for achieving KPIs	To support the monitoring and achievement of academy KPIs
			To produce and monitor a post Ofsted action plan	To monitor a Post Ofsted action plan	To prepare post Ofsted action plan
		To receive data on the academic performance of academies twice a year	To monitor the Trust and academies data at standards meetings	To prepare data for the Trust on academy and Trust outcomes at key points in the year	To monitor the academy data at standards meetings
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Policies		To draw up a 3 year policy review plan for all statutory policies	Ensure Trust policies are in place for management and curriculum areas	Monitor Trust Policies relating to school improvement	Work within policies set by the Trust

			To have access to all policies whether Trust- wide or academy specific policies	To be aware of Trust- wide and academy specific policies	To provide the Trust with any academy specific policies
Function	Members	Trustees	Executive Team	Shared Local Governing Board	Headteacher
Structures			To maintain an school sessions and overview of the times of dates of school terms and holidays	To set the times of school sessions and the dates of school terms and holidays	To set the times of school sessions and the dates of school terms and holidays
			To be consulted on any proposals for changes to the school day	To consult stakeholders on proposals to change the school day	To consult on any changes to the school day
			To check that the academy meets the statutory requirements for 380 sessions in a school year		To ensure the academy meets the statutory requirements for 380 sessions in a school year
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Admissions and Organisational Changes		To consult before amending the Admissions policy	To advise the Trust Board on changes to the Admissions Policy	To be consulted on changes to the Admissions Policy	To meet the requirements of the Trust Admissions Policy
		To form an Appeals Panel for admissions			If appropriate to appeal against LA directions to admit pupil(s)
		To publish proposals to change category of school	To draw up and publish proposals to change a category of school	To be consulted on any proposal to change school category	To be consulted on any proposal to change school category
			To monitor pupil numbers and the promotion of school in the Plymouth and surrounding community	To oversee the promotion of the academy in the academy community and to potential pupils	Recruitment of pupils
Function	Members	Trustees	Executive Team	Shared Local Governing Board	Headteacher
Safeguarding		To adopt a Safeguarding Policy in line with statutory requirements and best practice Safeguarding Policy in	To draw up a Safeguarding Policy in line with statutory requirements and best practice	To monitor the academy's adherence to the safeguarding policy	To adhere to the Trust Safeguarding policy
					To maintain accurate and effective and secure pupil records
		To conduct an appeal panel against an exclusion	To support headteachers needing to exclude a pupil	To review the use of exclusion and to decide whether or not to uphold the headteacher's decision to exclude	To exclude pupils in line with directions in the Trust Exclusion Policy
Function	Members	Trustees	Executive Team	Shared Local Governing Board	Headteacher
Education		To hold the Executive Team to account for the delivery of an effective curriculum policy	To work with the academies to develop and implement a curriculum policy	To monitor the curriculum	To deliver the Trust curriculum policy
		To receive reports on the quality of teaching and learning	Monitor and evaluate the quality of teaching and learning	Monitor and evaluate the quality of teaching and learning	Monitor and evaluate the quality of teaching and learning
				Monitor and evaluate the quality of individual children's education	Monitor and evaluate the quality of individual children's education
		To hold the Executive Team to account for the delivery of an effective assessment and feedback policy	To work with the academies to develop an assessment, feedback policy, to agree key moderation and data collection points	To monitor the assessment and feedback policy	To deliver the Trust assessment & feedback policy
		To ensure provision of RE in line with school's basic curriculum		Monitor the provision of RE in the academy	To ensure provision of RE in line with the academy's basic curriculum
Function	Members	Trustees	Executive Team	Shared Local Governing Board	Headteacher
Pupils		Receive reports from the CEO on the impact of Pupil Premium, Sports Premium, catch up funding spend on pupil outcomes		Monitor the impact of Pupil Premium, Sports Premium, catch up funding spend on pupil outcomes	Ensure effective use of the pupil premium and other grants
		To discharge duties in respect of pupils with special educational needs and disabilities	To discharge duties in respect of pupils with special educational needs and disabilities	To monitor the effectiveness of strategies for children with SEND	To discharge duties in respect of pupils with special educational needs and disabilities
		To receive reports on attendance	To oversee attendance across the Trust	Review pupil attendance	Report on pupil attendance
		Ensure the prohibition of radicalisation, promotion of equality, diversity & tolerance, and a balanced treatment of political issues is part of all policies and the Strategic Vision	Prohibit radicalisation, promote equality, diversity & tolerance, ensuring a balanced treatment of political issues	Monitor school policies and practice in relation to equality and diversity during visits	Prohibit radicalisation, promote equality, diversity & tolerance, ensuring a balanced treatment of political issues
		To ensure provision of free school meals to those pupils meeting the criteria	To ensure provision of free school meals to those pupils meeting the criteria	To monitor the provision of free school meals to those pupils meeting the criteria	To ensure provision of free school meals to those pupils meeting the criteria
Function	Members	Trustees	Executive Team	Shared Local Governing Board	Headteacher
Staffing		To appoint a CEO (through a selection panel) including pre-recruitment checks			
		To appoint a principal or headteacher (through a selection panel) including pre-recruitment checks		To contribute to the appointment process for a principal or headteacher (through a selection panel)	
		To agree the staffing structure of the Executive team within the agreed budget	To appoint to the Executive Team		
		To agree the staffing structure of the Central Service Team within the agreed budget	To appoint to the Central Service Team		
			To give support on the appointment to a SLT	To support the appointment of a SLT (through a selection panel)	To appoint a SLT (through a selection panel)
				To be advised of the appointment of academy staff	To appoint academy staff
		To adopt Trust HR & Employment Policies (Appraisal, capability, complaints, disciplinary, grievance, pay policy)	To oversee Trust HR & Employment Policies (Appraisal, capability, complaints, disciplinary, grievance, pay policy)	To be aware of Trust HR & Employment Policies (Appraisal, capability, complaints, disciplinary, grievance, pay policy)	To work within Trust HR & Employment Policies (Appraisal, capability, complaints, disciplinary, grievance, pay policy)

			To support pay discretions (within Trust Pay Policies)		To exercise pay discretions (within Trust Pay Policies)
		To form an Appeals Panel for complaints regarding the headteacher	To support the headteachers with regard to complaints	To form an Appeal Panel for complaints if unresolved	To follow the Trust complaints policy
NB: 1 member of the panel must be independent of the management and running of the school		Members - Form an Appeals Panel to consider dismissal of headteacher/principal.	To dismiss / suspend / end suspension of principal/headteacher	Chair Shared Local Governing Board informed of suspension of headteacher/principal	
		Trustees - Form an Appeals Panel to consider staff appealing against redundancy	To exercise redundancy procedures as required by the academy	To be consulted on staff redundancies within the academy	To exercise redundancy procedures as required by the academy
		Trustees form Appeals Panel in the cases of dismissal of staff	To support the dismissal / suspension/ end of suspension of other staff	Chair Shared Local Governing Board notified of suspension of staff. Shared Local Governing Board form Appeals Panel in the cases of	To dismiss / suspend / end suspension of other staff
		To determine dismissal payment/early retirement of the principal/headteacher	Determining dismissal payment/early retirement of the principal/headteacher	To be consulted on the dismissal payment/early retirement of the principal/headteacher	
			Determining dismissal payment/early retirement of others	Shared Local Governing Board - To be aware of the dismissal payment/early retirement of others	Determining dismissal payment/early retirement of others within the Trust policy
		To complete the statutory appraisal of CEO			
			To work with local governors to complete the headteacher's appraisal	To undertake the appraisal of the headteacher with the support of the CEO	
			To deliver the statutory appraisal of central service staff		
				To be advised of the progress of the appraisal process	To secure the statutory appraisal of all academy staff
			To maintain accurate and effective and secure employee records	Shared Local Governing Board Safeguarding Governor - inspect the Single Central Record	To maintain accurate and effective and secure employee records
Function	Members	Trustees	Executive Team	Shared Local Governing Board	Headteacher
School Finance				To oversee the proposal of an academy budget	To develop and propose the individual academy budget
		To approve the first formal budget plan each financial year	To approve the first formal budget plan each financial year		
			Plan/manage/monitor monthly expenditure & finance reports: identify actual/potential budget over/underspend		Plan/manage/monitor monthly expenditure & finance reports: identify actual/potential budget over/underspend
				To be aware of any significant changes to the budget	To approve any amount to be transferred between budget headings and/or likely budget overspends
		To establish Financial Decision Levels and Limits			
		To adopt Financial Decision Levels and Limits	To establish Financial Decision Levels and Limits		
			Enter into additional contracts that exceed agreed budget allocations within limits specified in financial regulations.		
		To authorise acquisition of assets within limits specified in the financial regulations manual	To acquire assets within limits specified in the financial regulations manual		To acquire assets within limits specified in the financial regulations manual
		To authorise disposal of assets within limits specified in the financial regulations manual	To dispose of assets within limits specified in the financial regulations manual		To dispose of assets within limits specified in the financial regulations manual
		To agree the appointment of internal and external auditors	To support the appointment of internal and external auditors		
			To make payments within agreed financial limits		To make payments within agreed financial limits
			To collect income due to the academy		To collect income due to the academy
			To give guidance on the maintenance of proper financial records for the academy		To maintain proper financial records for the academy
			To prepare monthly accounts for the Trust		To support the preparation of monthly accounts for the Trust
			To monitor compliance with approved financial procedures		
		To develop risk management strategies	To develop risk management strategies		
			To implement IT strategy, policies & systems		To implement IT strategy, policies & systems
		Premises - design & maintenance			
	Establish, review & monitor risk register	Establish, review & monitor risk register			
	Be advised of Trust wide benchmarking outcomes	Benchmarking	Benchmarking & ensure Trust-wide value for money	Benchmarking & ensure Trust-wide value for money	
Function	Members	Trustees	Executive Team	Shared Local Governing Board	Headteacher
Buildings Improvement and Inspection		To develop academy buildings and facilities estate long term strategy or master plan	To support academy buildings and facilities estate long term strategy or master plan		To give input to a long term strategy or masterplan
		To ensure academies are maintained, including development of a properly funded maintenance plan	Producing and maintaining buildings, including developing properly funded maintenance plan		To work within the Trust maintenance policy

		To ensure Health & Safety regulations are met	To provide services to support health and safety	To oversee H&S of the academy	To follow the Trust H&S policy
		To receive a report on premises security & management	To provide services to support premises security & management	To monitor premises security and management	Ensure premises security & management at local level
		To consider additional central services to be procured on behalf of the academy	To identify additional central services to be procured on behalf of the academy		To be consulted on additional central services to be procured on behalf of the academy
		To determine the scope of central services to be delivered to and on behalf of the academy and to ensure value for money	To determine the scope of central services to be delivered to and on behalf of the academy and to ensure value for money	To monitor quality of central services	
Function	Members	Trustees	Executive Team	Shared Local Governing Board	Headteacher
Relationships & Communications		To develop a Trust strategy for branding, logos etc	To support a Trust strategy for branding, logos etc		To use Trust branding as supplied
		To ensure good relations and communication with the DfE and national agencies	To ensure good relations and communication with the DfE and national agencies		To ensure good relations and communication with the DfE and national agencies
			To develop and maintain good relations with the press, LA and other forums including Trade Unions and Professional		To develop and maintain good relations with the press, LA and other forums including Trade Unions and Professional
				To develop and maintain good relations and communication with the academy community	To ensure good relations with the school community
Function	Members	Trustees	Executive Team	Shared Local Governing Board	Headteacher
Information Sharing			To maintain an overview of the School Prospectus		To prepare and publish the School Prospectus
		To ensure the Trust and academy websites are fully compliant	To support the academies and Trustees to ensure website compliance	To monitor the academy website to check compliance	To ensure the academy website is fully compliant