

**St Bartholomew's CE MAT**  
**Scheme of Delegation Decision Matrix – Outstanding and Good Schools**

<b>R – Responsible</b>	The person(s) who actually carries out the process or task assignment; responsible for getting the job done.							
<b>A – Accountable</b>	The person/group ultimately accountable for the process or task being completed appropriately; responsible person(s) are accountable to this person/group.							
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No.	Strategy and Leadership	Members	Directors	CEO	ELT	LGB	HT / HoS	Comments
SL1	Set vision and strategic objectives of the trust		A	R	C	C	C	LGB & leadership consulted on overall trust vision and objectives. Expectation of high degree of congruence.
SL2	Set vision and strategic objectives of the schools		A	R	C	A – for school	R – for school	LGB accountable to Directors for individual school objectives. Directors accountable to Ofsted and ESFA for overall trust performance. Expectation of high degree of congruence.
SL3	Oversee implementation of the strategic objectives of the trust		A	R				
SL4	Oversee implementation of the strategic objectives of the schools		A	R		A – for school	R – for school	LGB accountable to Directors for implementation of individual school objectives. Directors accountable to Ofsted and ESFA for delivering the overall trust vision and objectives. Expectation of high degree of congruence.
SL5	<b>Compliance: Funding Agreement</b> – comply with all obligations including the Academies Financial Handbook	A	A	R	R	A – for school	R – for school	
SL6	<b>Compliance: Regulatory</b> – with all regulations which affect the trust (including charity law, company law, employment law and health and safety legislation)	A	A	R	R	A - for school	R – for school	

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No.	Strategy and Leadership	Members	Directors	CEO	ELT	LGB	HT / HoS	Comments
SL7	<b>Compliance: Financial Oversight</b> – 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	A to the ESFA and Parliament	R		R – for school	CEO is accountable to ESFA and parliament as the Accounting Officer (Academies Financial Handbook s1.5.24)
SL8	<b>Compliance</b> – completing the register of business interest and putting in place a procedure to deal with any conflicts of interest and connected party transactions		A	R	I	A – for school	R – for school	CEO responsible in respect of maintaining register of business interest for Directors as part of Accounting Officer capacity
SL9	<b>Appointment and dismissal of directors</b> – ensuring processes are in place for appointment of directors (including ensuring that the directors have the skills to run the trust)	A, R	C					
SL10	<b>Appointment of LGB Governors</b> – ensuring processes are in place for the appointment of LGB Governors (including ensuring that the individuals have the skills to monitor the schools)		A	C		R	C	
SL11	<b>Appointment of Chairs and Vice-Chairs of LGB</b>		A	C		R	I	Chair and Vice-Chair elected by members of LGB on annual basis but subject to approval by trust board.
SL12	<b>Appointment of clerk to trust board and LGB</b>		A	R		C		
SL13	<b>To consider whether or not to exercise delegation of functions to individuals/committee (such as LGB)</b>		A	R		I		

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SL14	Appointment of the Accounting Officer		A, R					
SL15	Appointment of trust external auditors	A	R	C				
SL16	Appointment of trust internal auditors		A	R				
SL17	Policies – review and approval of trust wide policies (refer to policy review schedule)		A	R				Delegated as appropriate to committees for recommendation to trust board for ratification.
SL18	Policies – review and approval of school level policies (refer to policy review schedule).			I		A	R	All school policies must be determined in line with trust policies/policy statements
SL19	Prepare and agree terms of reference for trust board committees		A, R	C				
SL20	Prepare and agree terms of reference for LGBs		A, R	C		I – for school		
SL21	Performance of trust board	A	R	C				

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SL22	Performance of trust board committees	A	R	C				
SL23	Performance of LGB		A, R	C		I – for school		
SL24	To appoint the IAB (Interim Advisory Board) and disband any ineffective LGB		A, R	C		I	I	
SL25	Training programme for directors and LGBs		A	R		R – for school	C – for school	
SL26	Legal claims – with potential impact on trust or school reputation		A	R		A – for school	R – for school	
SL27	Manage and mitigate strategic risk		A	R	R	A – for school	R – for school	
SL28	Code of conduct – directors and LGBs		A,R			I, R – for school		
SL29	To consider requests from other schools to join the trust		A	R				

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No.	Educational Effectiveness	Members	Directors	CEO	ELT	LGB	HT / HoS	Comments
EC1	Overall trust development plan		A	R	C	C	C	
EC2	Individual school development plan in line with strategic aims of the trust		I	C	I	A	R	Annual requirement
EC3	Key performance indicators – setting and reviewing performance of the trust and schools (in relation to academic standards, finance and other matters)		A	R	C	A – for school	R – for school	LGBs are accountable for academic standards
EC4	Quality of teaching – ensuring appropriate levels of support, challenge and intervention to support delivery of education outcomes		I	A	C	A – for school	R – for school	
EC5	Curriculum – setting the curriculum for the school and reviewing its effectiveness		I	A	C	A – for school	R – for school	
EC6	Pupil premium – reviewing and challenging the value for money of the pupil premium grant in terms of educational outcomes and narrowing the achievement gap		A	R	C	A – for school	R – for school	
EC7	Set admissions policy		A	R		C – for school	C – for school	LGB ensure compliance.
EC8	Admission application decisions and appeals		A	R		R - for school	C	

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No.	Educational Effectiveness	Members	Directors	CEO	ELT	LGB	HT / HoS	Comments
EC9	Collective worship arrangements for school, without religious character					A	R	
EC10	Student issues – including attendance, exclusions, punctuality and disciplinary matters		I	I		A	R	
EC11	School hours – setting the opening and closing times of the school			C		A	R	
EC12	Term dates and length of school day		A	R		I	I	
EC13	School lunch – ensure provided to appropriate nutritional standards			A		A – for school	R – for school	
EC14	Provision of free school meals to those meeting criteria			A		A – for school	R – for school	
EC15	Formal collaboration and partnership agreements			A			R	
EC16	Informal collaboration and arrangements			I		A – for school	R – for school	

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No.	Educational Effectiveness	Members	Directors	CEO	ELT	LGB	HT / HoS	Comments
EC17	Manage and mitigate educational risk		A	R	R	A – for school	R – for school	
EC18	Determining staff complement within agreed budget (staffing structure, not recruitment)		I	A	C	A – for school	R – for school	
EC19	Post-inspection action plan		A	R	C	A – for school	R – for school	
EC20	Assemble data for pupil assessment and other returns		A	R		A – for school	R – for school	
EC21	Prohibit radicalisation, promote equality, diversity and tolerance and ensuring the balanced treatment of political issues		A	R		A – for school	R – for school	
EC22	Ensuring the well-being of all pupils including developing and implementing a pupil well-being strategy		A	R	C	A – for school	R – for school	

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No.	HR	Members	Directors	CEO	ELT	LGB	HT / HoS	Comments
HR1	Appointment – CEO	C	A, R			I	I	Refer to Appointment of Staff Grid but Chairs of LGB to be observers at interview stage.
HR2	Appointment - ELT		A	R	C	I	I	Refer to Appointment of Staff Grid
HR3	Appointment – HT / HoS		A, R	R	I	C – for school		Refer to Appointment of Staff Grid.
HR4	Appointment – DHT and AHT			A, R		I – for school	R – for school	Refer to Appointment of Staff Grid
HR5	Appointment – central trust staff		A, R	R	I		I	Refer to Appointment of Staff Grid
HR6	Appointment – school staff			A, R	I	I – for school	A, R – for school	Refer to Appointment of Staff Grid
HR7	Establishing trust wide HR policies – including recruitment, pay policy, capability, grievance and absence policies and all in accordance with all appropriate regulations		A	R	C	I	I	
HR8	Performance management - CEO		A, R	I				Refer to Appraisal Policy & Pay Policy. Pay awards considered by <b>Directors’</b> Pay Committee.



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No.	HR	Members	Directors	CEO	ELT	LGB	HT / HoS	Comments
HR9	Performance management – ELT and HT/HoS		A	R	I	I	I	Refer to Appraisal Policy & Pay Policy. Pay awards considered by <b>Directors'</b> Pay Committee.
HR10	Performance management – central trust staff			A, R	R			Refer to Appraisal Policy & Pay Policy. Pay awards considered by <b>Directors'</b> Pay Committee.
HR11	Performance management – school staff			C	C	A	R	Refer to Appraisal Policy & Pay Policy. Pay awards considered by <b>Governors'</b> Pay Committee.
HR12	Setting terms and conditions of employment and staff handbook		C	A, R			R – for school	
HR13	Dismissal – CEO		A, R	I	I	I	I	In accordance with the trust disciplinary and capability policies
HR14	Dismissal – ELT and HT/HoS		A, R	C	I	I	I	In accordance with the trust disciplinary and capability policies
HR15	Dismissal – central trust staff		A, R	C				In accordance with the trust disciplinary and capability policies
HR16	Dismissal – school staff		I	C	I	A, R	C	In accordance with the trust disciplinary and capability policies.
HR17	Reviewing discipline and grievance policy		A	R			I	

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HR18	Review central trust team structure		A	R	C			
HR19	Organisation restructure – central trust team		A	R	C			Board ratification required. CEO notification before process begins, HR advice involved.
HR20	Organisation restructure – school staff		I	C	C	A, R	R	Board ratification required. CEO notification before process begins, HR advice involved.
HR21	Safeguarding		A	R		A – for school	R – for school	
HR22	Manage and mitigate HR risk		A	R	R	A – for school	R – for school	
HR23	Maintain accurate, effective and secure employee records – central trust team			A	R			
HR24	Maintain accurate, effective and secure employee records – school staff			A	C		R – for school	
HR25	Ensuring the well-being of all staff including developing and implementing a staff well-being strategy		A	R	C	A – for school	R – for school	

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No.	Operations and Estates	Members	Directors	CEO	ELT	LGB	HT / HoS	Comments
OP1	<b>Central services</b> – determining and allocating central services provided to the schools by the trust		A	R	R	I	C	Annual requirement
OP2	<b>Central services</b> – overseeing the effectiveness of the central services provided to the schools by the trust		A	R	R	I	C	Annual requirement
OP3	<b>Developing school buildings and facilities estate long term strategy</b>		A	R	R	I – for school	C – for school	
OP4	<b>Maintaining buildings and developing properly funded maintenance plan</b>			I	C	A – for school	R – for school	
OP5	<b>Arranging insurance for the trust and its schools</b>		A	R	R			
OP6	<b>Media and PR</b> – overseeing public relations activities to project the activities of the trust and school to the wide community		I	A, R		I	C – for school	
OP7	<b>Trust prospectus and web site</b>		C	A	R			
OP8	<b>School prospectus and web site</b>			C		A – for school	R – for school	
OP9	<b>Dealing with trust complaints</b>		A	R				Refer to trust Complaints Policy

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No.	Operations and Estates	Members	Directors	CEO	ELT	LGB	HT / HoS	Comments
OP10	Dealing with school complaints		A – if complaint re LGB	I, R		A – for school	R – for school	For individual school complaints the LGB is responsible in the first instance, unless complaint is about the LGB. Refer to trust Complaints Policy for further guidance.
OP11	Manage and mitigate operational and estates risk		A	R	R	A – for school	R – for school	
OP12	Comply with all GDPR legislation and good practice		A	R	R	A – for school	R – for school	
OP13	Ensure health and safety regulations are followed		A	R	R	A – for school	R – for school	
OP14	Premises security		A	I	C	A – for school	R – for school	
OP15	Premises management		I	A	C	A – for school	R – for school	

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No.	Financial	Members	Directors	CEO	ELT	LGB	HT / HoS	Comments
<b>F1</b>	<b>Funding model</b> – agreeing a funding model across the trust and develop an individual funding model for each school so as to secure the trust’s financial health in the short, medium and long term (top slice)		A	R	R	I	I	Refer to Central Funding and Services Policy
<b>F2</b>	<b>Central trust annual budget</b> – formulating and setting including 5 year forecast		A	R	R			Finance & Audit Committee initial discussions, approved by trust board
<b>F3</b>	<b>Central trust annual budget</b> – ensuring delivery of agreed budget		I	A	R			Finance & Audit Committee to review financial performance at least once a term
<b>F4</b>	<b>School annual budget</b> – formulating and setting including 5 year forecast		A	R	R	A – for school	R – for school	Finance & Audit Committee initial discussions, approved by trust board.
<b>F5</b>	<b>School annual budget</b> – ensuring delivery of agreed budget		I	A	R	A – for school	R – for school	Finance & Audit Committee to review financial performance at least once a term.
<b>F6</b>	<b>Financial key performance indicators</b> – setting		A	R	R	I	I	
<b>F7</b>	<b>Financial key performance indicators</b> – reporting		I	A	R	I – for school	R – for school	Finance & Audit Committee to review financial performance at least once a term
<b>F8</b>	<b>Financial policies</b> – establishing policies and procedures to ensure compliance with the trust’s financial reporting requirements		A	R	R	I	I	

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F9	Establish financial decisions levels and limits		A	R	R	I	I	
F10	Maintain proper financial records			A	R		R – for school	
F11	Statutory financial reporting – annual accounts	I	A	R	R			Members to receive signed annual accounts
F12	Statutory financial reporting – other including ESFA requirements		A	R	R			
F13	Investments – agreeing the investment policy in line with the Academies Financial Handbook and any internal policies and controls		A	R	R			Investments are restricted to fixed term cash deposits only.
F14	Procurement – agreeing the procurement policy to be used for all suppliers in line with the Academies Financial Handbook and other regulations as applicable		A	R	R		I	
F15	Procurement – identify additional services to be procure on behalf of the school			A	R		C	
F16	Procurement – ensure central procured services provide value for money		A	R	R		C	
F17	Lettings – setting school specific lettings policies in accordance with the Funding Agreement, Academies Financial Handbook and internal policies and controls			I	C	A – for school	R – for school	

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F18	Collect income due to the school			I	C		A, R – for school	
F19	Submitting grant applications		A – above £25,000	A – up to £25,000	R	A – for school	R – for school	
F20	Approval of borrowing		A	R	R			
F21	Ensuring VAT compliance		I	A	R		R – for school	
F22	Manage and mitigate financial risk		A	R	R			

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