



Transforming Lives
EDUCATIONAL TRUST

Scheme of Delegated Authority

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Where Principal is mentioned in this policy please read as Executive Principal for secondary

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Section 1 - System of Governance

1 – Introduction

- 1.1 Transforming Lives Educational Trust (**TLET/the Trust**) is a charitable company limited by guarantee, (company number 07515832) and is an exempt charity. For the purpose of company law, the Trustees of Transforming Lives Educational Trust are directors of the charitable company.
- 1.2 The Trust is formally recognised by the Secretary of State for Education as a Multi-Academy Trust in accordance with the Academies Act 2010 and through the contractual instrument of the Master Funding Agreement.
- 1.3 The Trust is governed by a Trust Board (**TB**) which is accountable to the Secretary of State for Education and the Department for Education and has overall responsibility and ultimate decision-making authority for all the work of the Trust, including the establishment and running of the academies operated by the Trust. Terms of Reference for the Trust Board can be found on the [TLET Website](#).
- 1.4 The following academies are currently operated by the Trust:
- Ashlawn School
 - Henry Hinde School
 - Houlton School
- 1.5 In order to assist with the discharge of their responsibilities, the Trust Board has established three sub-committees, the Safeguarding & Standards Committee (**SSC**), the Operations Standards Committee (**OSC**) the Audit & Risk Committee (**ARC**), and the People Committee (**PC**) Terms of Reference for these subcommittees can be found on the [TLET website](#).
- 1.6 In order to assist with the discharge of their responsibilities, the Trust Board has established Local Governing Boards (**LGB**) for each of the academies. The Local Governing Board (**LGB**) shall be a formally recognised and approved sub-committee of the Trust Board and established pursuant to Articles 100 to 104 (inclusive) of the Trust's [Articles of Association](#) (the **Articles**). Terms of Reference for the LGB can be found on the [TLET website](#).
- 1.7 The Scheme of Delegated Authority (**SoDA**), as set out below, forms part of a suite of documents adopted by the Trust as the governance framework for the oversight and management of TLET's community of academies. The principal aims are to:
- Ensure clarity of vision, ethos and strategic direction.
 - Hold executive leaders to account for the educational performance of the organisation and its pupils, and the effective and efficient performance management of staff.
 - Oversee the financial performance of the organisation and make sure its money is well spent.
- 1.8 The SoDA, as set out here, must be read in conjunction with the Trust's governance framework documents and can be found on the [TLET Website](#). These include the Trust's internal documentation and pertinent external publications. For a list of Related Documents, see page 7.
- 1.9 This SoDA may only be amended by the Trust Board.

2 – Purpose

- 2.1 Central to the Trust's governance structure, business operation, and educational ethos and delivery is the Trust Board, the Executive, the LGB, and Academy Principals.
- 2.2 This SoDA clearly delineates delegated authorities and responsibility, which cascade down from the Trust Board to the Executive, the LGB, and Academy Principals.
- 2.3 When a process is not mentioned in this SoDA, it shall be assumed to have been retained by the Trust Board.

3 – Monitoring of Scheme of Delegated Authority

- 3.1 It is the responsibility of the Trust Board and those to whom it delegates the authority, to ensure that the principles and procedures of this SoDA are adhered to. The use of this document will be subject to routine monitoring to ensure its fidelity in practice. The evidence gathered from monitoring shall inform any reviews and future revisions to the SoDA, which will be carried out at regular intervals and no later than as stated on Page 2 of this document.

4 – Related Documents

[TLET Articles of Association](#)

[TLET Handbook of System of Governance and Working Practices](#)

[TLET Members Terms of Reference](#)

[TLET Trust Board Terms of Reference](#)

[TLET LGB Terms of Reference](#)

[TLET Link Trustee Terms of Reference](#)

[TLET Standards and Safeguarding Committee Terms of Reference](#)

[TLET Audit and Risk Committee Terms of Reference](#)

[TLET Code of Business Conduct](#)

[TLET Declaration of Pecuniary and Personal Interests](#)

[TLET Master Funding Agreement](#)

[TLET Supplemental Funding Agreements](#)

TLET Strategic Plan

[The ESFA Academy Trust Handbook](#) (updated annually)

[The DfE Guidance: Multi-academy Trust Resources](#) (periodically updated)

[The DfE Governance Handbook](#) – an essential resource for governors and Trustees outlining roles and responsibilities for those governing. It also details the legal duties of the governing board of all state schools in England.

Section 2 - Scheme of Delegated Authority

Role Descriptors

The following descriptors are used in this document to describe the roles of the various groups and individuals.

Descriptor	Letter	Meaning
Accountable (and Approves)	A	Ultimately answerable for the task being delivered. Delegates the task to those responsible. There should be only one group/person accountable for each task/decision. Unless otherwise stated, this group are also responsible (R).
Responsible	R	Responsible for the delivery. Does the work to achieve the task. Can be shared between groups/individuals.
Consulted	C	Needs to be involved before the decision is made. Communication is two-way. These are important stakeholders or have relevant specialist knowledge in the subject.
Informed	I	Those to be kept up-to-date on progress. Communication is one-way, and may be updated only when the decision has been taken.

References to the Trust Board include the following sub-committees:

Audit & Risk Committee (ARC)
Operations Standards Committee (OSC)
Safeguarding & Standards Committee (SSC)
People Committee (PC)

References to the CEO include members of the Central Team to whom the CEO will delegate authority e.g:

Chief Financial Officer (CFO) - Financial matters
Director of Operations (DoO) - Business and operational matters
Director of Education (DoE) - Educational matters
Governance Professional (GP) - Governance

Section 1 - Vision, Ethos & Strategic Direction					
		TB	CEO	LGB	P
1.1	Setting the Trust's vision	A	R		I
1.2	Setting the Trust's values	A	R		I
1.3	Setting the Trust's strategic ambitions	A	R		I
1.4	Setting the Trust's strategic key results	A	R		I
1.5	Setting the Trust's strategic plan	A	R	C	C
1.6	Setting each Academy's vision (aligned with TLET's Vision and Ambitions)	I	A	C	R

Section 2 - Leadership & Governance					
		TB	CEO	LGB	P
2.1	Appointing Members (See Articles of Association I5A & Members Terms of Reference)				
2.2	Appointing Trustees (See Members Terms of Reference)				
2.3	Appointing Governors (See Trustees Terms of Reference)	A			
2.4	Establishing & Appointing Board Committees	A			
2.5	Establish the process for electing parent & staff governors	A		R	
2.6	Implement the process for electing parent & staff governors			A	C
2.7	Appoint (& remove) to the post of Chair & Vice Chair of LGB	A		C	I
2.8	Set up register of Trustee business interests & publish on the Trust website	A			
2.9	Set up register of governor business interests & publish on the academy website	A		R	
2.10	Ensure trust-wide statutory policies are in place & published as needed	A	R		
2.11	Ensure academy statutory policies are in place & published as needed		A		R
2.12	Comply with all Trust policies	A	R	R	R
2.13	Nominating Lead Trustee/s for SEND & Safeguarding	A			
2.14	Ensure Trust website is compliant with statutory requirements, DfE/ESFA expectations & Trust branding requirements.		A		
2.15	Ensure academy websites are compliant with statutory requirements, DfE/ESFA expectations, & Trust branding requirements.		A		R
2.16	Reviews SoDA annually & determine delegated functions.	A	R	C	I
2.17	Determine the indicators that trigger the withdrawal of delegated responsibility	A	R	I	
2.18	Provide a summary of decisions/actions taken by LGB to TB			A	
2.19	Maintain a register of Trustee training	A			
2.20	Maintain a register of Governor training	A		R	
2.21	Procure appropriate governor indemnity insurance	A	R		
2.22	Undertake regular skills audit of Trustees	A			
2.23	Undertake regular skills audit of Governors	A		R	

2.24	Ensure Academy culture aligns to Trust's vision and values	I	A	C	R
Section 3 - Safeguarding					
		TB	CEO	LGB	P
3.1	Establish Trust Safeguarding policies are in place & published as needed (See Services Framework: Appendix 3 Statutory Policies & Appendix 4 Additional Policies)	A	R		
3.2	Ensure Trust statutory training is in place & regularly updated	I	A	I	R
3.3	Ensure compliance with statutory audits	I	A		
3.4	Ensure compliance with Trust audits		A		R
3.5	Ensure Single Central Record is compliant & current	I	A	I	R
3.6	Ensure 'safeguarding' risks are identified and reviewed on the Risk Register	A	R	C	
3.7	Ensure robust safeguarding curriculum	I	A	I	R
3.8	Ensure robust safeguarding induction for employees & volunteers		A		R
3.9	Ensure Designated Safeguarding Leads are appointed and adequately trained		A	I	R
3.10	Ensure robust web filtering is in place		A/R		
3.11	Ensure fit for purpose monitoring of use of IT equipment is in place		A		R
3.12	Ensure Academy maintains an effective culture of safeguarding and inclusion	I	A	C	R

Section 4 – Finance inc. Audit & Risk					
		TB	CEO	LGB	P
4.1	Establish Finance Policy, Procedures and Controls	A	R		I
4.2	Complete statutory Finance Reporting	A	R		
4.3	Produce Trust 3 Year Business Plan (BFR3Y)	A	R		
4.4	Establish Trust Annual Budget	A	R		
4.5	Establish Academy Annual Budget	I	A		C
4.6	Oversee use of reserves or increase to overall Budget	A	R		R
4.7	Oversee allocation of Reserves	A	R		I
4.8	Report Monthly Management Accounts, Trust and Academies	A	R		I
4.9	Monitor Monthly Management Accounts Trust	A	R		
4.10	Monitor Monthly Management Accounts Academy	I	A		R
4.11	Approve contracts in excess of £25k	A	R		
4.12	Approve expenditure - budgeted See Section 5 of Appendix 2 of the Finance Policy				
4.13	Approve expenditure - unbudgeted See Section 5 of Appendix 2 of the Finance Policy				
4.14	Payments in accordance with Academies Handbook See Section Appendix 3 of the Finance Policy				
4.15	Approve appointment of Bankers	A	R		
4.16	Authorise Credit Card Users		A		
4.17	Authorise Travel Card Users		A		
4.18	Manage bad Debt in accordance with the Academies Handbook	A	R		
4.19	Oversee disposal of Assets	A	R		
4.20	Ensure insurance Premium Renewal	A	R		
4.21	Appoint External Auditors	A	R		
4.22	Appoint Internal Auditors	A	R		

Section 5 - Education					
		TB	CEO	LGB	P
Curriculum					
5.1	Prepare and agree TLET curriculum and qualification principles statement	C	A/R	I	C
5.2	Implement the agreed TLET curriculum	C	A	I	R
5.3	Monitor quality of teaching		A	I	R
5.4	Set targets for Trust outcomes	A	R	I	I
5.5	Deliver targets for academy outcomes	I	A	I	R
5.6	Establish and review the policy and provision of Relationships, Sex and Health Education	A	C	C	R
5.7	Establish and review the provision of careers and work-related learning	A	C	C	R
Assessment and recording					
5.8	Deliver academy target setting for pupil achievement & attainment	I	C	I	A/R
	Ensure training on Principals in role of Head of Centre		A/R		
5.9	Ensure statutory duties fulfilled in respect of assessment and reporting procedures, including the delivery of external exams		I	I	A/R
Behaviour and Attitudes					
5.10	Establish a TLET attendance policy	I	A/R	I	C
5.11	Implement a TLET attendance policy		I	I	A/R
5.12	Determine TLET behaviour principles statement		A/R	I	C
5.13	Implement behaviour policy based on TLET principles		I	I	A/R
5.14	Monitor behaviour and attendance	I	A	I	R
5.15	Undertake statutory review of permanent and fixed term exclusions	I	A	I	R
	Present individual intentions to exclude proposals		A		R
5.16	Review the use of exclusion and to decide whether or not to confirm all permanent exclusions and fixed term exclusions where the pupil/student is either excluded for more than 15 days in total in a term or would lose the opportunity to sit a public examination.	A	I	R	R
5.17	Direct reinstatement of excluded pupils/students			A	I
Admissions					
5.18	Set admissions policy and ensure this is reviewed in line with statutory requirements.	A	R	I	C

		TB	CEO	LGB	P
5.19	Form pupil/student admission appeals panel and conduct admission appeals process				A/R
5.20	Decide any reduction or increase to the published admission number (PAN)	A	R	I	C
School organisation					
5.21	Determine arrangements for collective worship		A	I	R
5.22	Set times of academy day and dates of academy terms and holidays	A	R	I	C
5.23	Ensure that academy provide 380 sessions in an academic year	A	R		R
5.24	Prepare and publish the academy prospectus		I	C	A/R
5.25	Ensure academy website is compliant with statutory duty		A		R
5.26	Ensure provision of free academy meals to those eligible		A		R
5.27	Adopt and review home/academy agreements			C	A
5.28	Determine uniform policy			C	A
Provision for Identified groups of pupils					
	Ensure statutory responsibilities for SEND are fulfilled at individual academy level	A	R		
5.29	Discharge duties in respect of pupils/students with special needs by appointing a "responsible officer"		I	I	A/R
5.30	Ensure compliance with SEND Code of Practice	I	A	I	R
5.31	Establish a TLET SEND Policy	A	R	I	C
5.32	Deliver support for children with SEND in alignment with local offer			I	A/R
5.33	Deliver support for children who are looked after (CLA)			I	A/R
5.34	Deliver support for children for whom English is an additional language			I	A/R
	Establish Trust policy for pupils with Medical Needs, including those who cannot attend school	A	R		R
5.35	Deliver support for pupils with Medical Needs, including those who cannot attend school			I	A/R
5.36	Determine, publish and deliver pupil premium strategy		C	I	A/R
Educational trips and visits					
5.37	Approve non-routine educational visits involving adventurous activities and/or overnight stays, and/or foreign travel		A	I	R
5.38	Approve all other educational visits				A/R
School Improvement					

5.39	Develop the TLET school improvement strategy	A	R	I	C
5.40	Deliver academy improvement strategies		A	C	R

Section 6 - HR

		TB	CEO	LGB	P
6.1	Determine academy staffing structures in accordance with approved budgets		C	I	A
6.2	Approval of appointments falling outside of the academy approved budget		A		R
6.3	Determine Trust staffing structures in accordance with approved budget	I	A		
6.4	Oversee approval of appointments falling outside of the trust approved budget	A	R		
6.5	Oversee appointment of the CEO	A			
6.6	Oversee Trust Executive appointments in accordance with budget decisions/approvals	A	R		
6.7	Oversee trust central appointments (exc. Exec) in accordance with budget decisions/approvals		A		
6.8	Oversee Associate Principal appointments	C	A		
6.9	Oversee Vice principal/Assistant Principal appointments in accordance with budget decisions/approvals		A	I	R
6.10	Oversee all other academy-based appointments within approved budgets				A
6.11	Determine pay policy (including discretions)	A	R	I	C
6.12	Setting trust-wide terms and conditions of employment	A	R		
6.13	Implement pay policy and terms and conditions of employment within academies		A		R
6.14	Determine performance management (PM) policy	A	R	I	C
6.15	Undertake PM reviews of CEO	A			
6.16	Undertake PM reviews of Principals	I	A		
6.17	Implement PM policy and undertake performance management of all other academy staff			I	A
6.18	Implement PM Policy and undertake performance management of central staff	I	A		
6.19	Determine disciplinary and capability policies	A	R		
6.20	Implement disciplinary and capability procedures in respect of Principals	I	A	I	

6.21	Implement disciplinary and capability procedures in respect of all other academy staff			I	A
6.22	Implement disciplinary and capability procedures in respect of the CEO	A			
		TB	CEO	LGB	P
6.23	Implement disciplinary and capability procedures in respect of Central Trust Exec team	I	A		
6.24	Implement disciplinary and capability procedures in respect of all other central staff		A		
6.25	Lead Trust wide relations with trade unions	I	A		
6.26	Lead Academy wide relations with trade unions		I	I	A
6.27	Approval of all exit payments exceeding contractual notice (e.g. settlement agreements, redundancy payments) in line with Academy Trust Handbook	A	R		
6.28	Approval of early retirement (where there is a cost to the organisation)	I	A		
6.29	Approval of pension discretions within the Local Government Pension Scheme (LGPS) requirements	I	A		
6.30	Ensure compliance with equalities legislation	A	R		

Section 7 - Operations					
		TB	CEO	LGB	P
7.1	Ensure that health and safety regulations are followed and regularly audited (water, fire, asbestos etc)	A	R		R
7.2	Maintain Academy buildings in accordance with the Trust Asset Management Plan and approved budget	I	A		I
7.3	Establish health and safety policies (H&S, COSHH, Risk Assessment, Maintenance policy etc)	A	R		I
7.4	Implement Trust health and safety and undertake procedures in accordance with those policies		A		R
7.5	Acquiring and disposing of Trust land and changing use of assets	A	R	I	C
7.6	Management of funds for estate improvement projects (CIF bids, capital spend etc)		A		C
7.7	Establish Trust data protection policies and procedures (Data Protection policy, Retention and Destruction policy, Privacy Notices)	A	R		I
7.8	Implement Trust data protection policies and undertake procedures in accordance with those policies		A		R
7.9	Establish Trust Sustainability policies (Environmental and Sustainability, Waste Management etc)	A	R		I
7.10	Implement Trust Sustainability policies approved by the Trust Board and undertake procedures in accordance with those policies		A		R

Section 8 - Other					
		TB	CEO	LGB	P
8.1	Establish Trust Cyber Security policies and procedures	A	R		I
8.2	Implement Trust Cyber Security policies and undertake procedures in accordance with those policies		A		R
8.3	Establish Trust ICT policies and procedures (acceptable use/CCTV/monitoring and filtering/social media)	A	R		I
8.4	Implement Trust ICT policies and undertake procedures in accordance with those policies		A		R

Section 9 - Statutory Policies					
School Improvement					
Policy	Author	Centralised	Aligned	Local	Governance
Early Career Teachers	DoE	C			
Special Educational Needs and Disabilities	DoE	C			SSC
Operations					
Policy	Author	Centralised	Aligned	Local	Governance
Critical Incident and Business Continuity	CEO	C			OSC
First Aid in School	DoO		A		OSC
Health and Safety	DoO		A		OSC
Sustainability & Environmental	DoO	C			OSC
Finance					
Policy	Author	Centralised	Aligned	Local	Governance
Acceptance of Gifts/Hospitality/Awards/Prizes/Benefits	CFO	C			ARC
Charging and Remissions	CFO	C			ARC
Governance Expenses	CFO	C			ARC
Investment	CFO	C			ARC
Governance					
Policy	Author	Centralised	Aligned	Local	Governance
Child Protection (Inc statement of procedures for dealing with allegations of abuse against staff)	TSL		A		SSC
Complaints	DoE	C			TB
Equality Policy	CEO	C			TB
Exclusions	DoE	C			SSC
HR					
Policy	Author	Centralised	Aligned	Local	Governance
Staff Capability	HoHR	C			PC
Staff Conduct	HoHR	C			PC
Staff Discipline	HoHR	C			PC
Staff Grievance	HoHR	C			PC
Pay	HoHR	C			PC
Whistleblowing	HoHR	C			PC
IT					
Policy	Author	Centralised	Aligned	Local	Governance
Data Protection	DoO	C			OSC

Academy					
Policy	Author	Centralised	Aligned	Local	Governance
Admissions	DoE			L	TB
Behaviour Policy	P			L	LGB
Careers Guidance	P			L	LGB
Children with health needs who cannot attend school	P			L	LGB
Designated teacher for looked-after and previously looked-after children	P			L	LGB
Early Years Foundation Stage (EYFS)	P			L	LGB
Equality Information and Objectives Statement	P			L	LGB
Supporting pupils with medical conditions	DoO		A		OSC
Register of Pupils' admission to school and attendance	P			L	LGB
Relationships Education (Primary) and Relationships and Sex Education (Secondary)	P			L	LGB
Uniform	P			L	LGB
16-19 Bursary Fund	P			L	LGB

N.B. The principal may delegate the writing of policies to various members of the academy's SLT.

Abbreviation	Title
CEO	Chief Executive Officer
CFO	Chief Finance Officer
DoE	Director of Education
DoO	Director of Operations
HoHR	Head of HR
TSL	Trust Safeguarding Lead
P	Principal