

Scheme of Delegation



WULFRUNA

PARTNERSHIP

Created by:
Harvey Sarai hsarai@bantockprimaryschool.co.uk
I reserve the right for this document not to be shared without my consent

TWP Scheme of Delegation

This scheme of delegation outlines the roles and responsibilities of the key stakeholders in The Wulfruna Partnership decision making. Ultimately, the Board of Trustees has accountability for the operation of all areas of the Partnership. The Board of Trustees has the power to delegate responsibility for areas of decision making to other key stakeholders as well as the commitment to consulting with others as part of the collaborative way of working in our Partnership.

The scheme of delegation should be used in association with other documents that guide the operation of a MAT, such as the Academy Trust Handbook, the Governance Handbook, our own Articles of Association and Terms of Reference.

The scheme of delegation will be reviewed regularly in order to assess suitability (annually as a minimum).

Responsible	R	The person(s) who actually carries out the process or task assignment; responsible for getting the job done
Accountable	A	The person/group ultimately accountable for the process or task being completed appropriately; responsible person(s) are accountable to this person/group
Consulted	C	People who are not directly involved with carrying out the task, but who are consulted, provide information and with whom there is two-way communication
Informed	I	Those who receive information about the process or task, or need to stay informed

Acronyms	TWP – The Wulfruna Partnership	TB – Trust Board	SoD – Scheme of Delegation	DPO – Data Protection Officer	ESFA – Education and Skills Funding Agency
	PAN – Pupil Admission Numbers	LA – Local Authority	LGB – Local Governing Board	GIAS - Get Information about Schools	

Admissions	R	A	C	I
CEO				
Authorise any change in the PAN or admission over PAN in any year group, across all schools	R			
Executive Team				
Monitor statutory compliance on behalf of the Trust	R			
Monitor student numbers and their impact on the financial health of the Partnership	R			
Provide support for setting and reviewing admissions policies and liaising with the LA	R			
Governors				
Provide support, challenge, advice and encouragement	R			
Headteachers				
Contribute to and comply with any LA in year admission and fair access protocols	R			
Implement the Partnership admissions policy and the appeals process	R			
Trustees				
Agree the principles underpinning each school's admissions policy including that of SEND students and the PAN		A		
Ensure that each school complies with admission appeals	R			

Complaints	R	A	C	I
CEO				
Receive updates from the headteacher on formal complaints received				I
Manage complaints when made against the Partnership	R			
Monitor complaints and their handling in line with DfE guidance	R			
Governors				
Manage complaints when made against their school		A		
Headteachers				
Deal with and respond to complaints at an informal and school level wherever possible	R			
Implement the Partnership's policies with respect to handling of complaints	R			
Informing the LGB and executive team on formal complaints	R			
Manage all complaint stages unless the complaint is against the Headteacher or LGB member	R			
Monitor statutory compliance in relation to complaints	R			
Trustees				
Set the complaints policy		A		
Manage complaints when made against the Partnership and LGB/Headteachers		A		
Monitor statutory compliance in relation to complaints	R			

Curriculum	R	A	C	I
CEO				
Provide curriculum guidance for all schools	R			
Agree and review the effectiveness of the curriculum		A		
Governors				
Adhere to the principles on which the school's curriculum policies are based in line with guidance as prepared by the DfE		A		
Ensuring actions from the SEND review are implemented in schools		A		
Know and understand the school's own evaluation of the quality of its curricular and extra-curricular provision	R			
Know and understand the school's own evaluation of the quality of spiritual, moral, social and cultural development of students	R			
Support, challenge and advise the school in the development and implementation of its curriculum and qualifications framework and its extra-curricular provision	R			
Headteachers				
Development and implementation of the school's curriculum	R			
Development and implementation of the school's extra-curricular provision	R			
Ensure statutory policies as outlined by the Partnership are in place and implemented	R			
Ensure the curriculum allows students to progress to the next stage effectively	R			
Ensuring an annual review is completed of SEND provision for SEND pupils and appropriate actions taken	R			
Quality of spiritual, moral, social and cultural development of students	R			
Trustees				
Know the strategic vision for the schools' curriculum				I
Know the strategic vision for the spiritual, moral, social and cultural development of students				I

Educational Effectiveness		R	A	C	I
CEO					
Ensure that the schools within the Trust comply with all the duties in relations to students with SEND			A		
Monitor each school's performance, it's regulatory compliance and support and challenge each school to develop its strengths and to address its weaknesses		R			
Monitor each school's response to the recommendations of their last inspection and any significant changes in the quality of education		R			
Review and challenge the value for money of the pupil premium grant in terms of educational outcomes and narrowing the gap		R			
Set term dates and length of school day		R			
Executive Team					
Monitor progress, achievement and learning of different groups of students		R			
Monitor the overall quality of students' progress, achievements and learning (achievement, attainment, progress, attitudes) and for supporting and challenging the school in order to help it continue to improve		R			
Provide professional support to schools to help them improve and deliver high quality academic performance		R			
Governors					
Know and understand the school's response to the recommendations of the last inspection and any significant changes in the quality of education or care.		R			
Know, understand and challenge the overall quality of students' achievements and learning (achievement, attainment, progress, attitudes)		R			
Support the school in its self-evaluation of significant strengths or weaknesses (academic and other achievements, personal development, and governance, leadership and management)		R			
Review and challenge the value for money of the pupil premium grant in terms of educational outcomes and narrowing the gap for the school			A		
Collective worship arrangements are in place for the school			A		
Set the opening and closing times for the school			A		

Educational Effectiveness				R	A	C	I
Headteacher							
Accurate self-evaluation of the school, its strengths and weaknesses and for implementing a plan of action to address this				R			
Cooperates effectively with school-to-school support identified for the school to bring about rapid and sustained improvements				R			
Has a detailed understanding of the overall quality of student’s achievements and progress based on accurate evidence of individual student achievement and progress				R			
Knows what to do to improve academic performance and ensures appropriate action is taken in a timely, consistent and strategic way				R			
Liaise with the local authority in respect of students who have or might have SEND				R			
Specifically has a detailed understanding of the achievements and progress of different groups of students based on accurate evidence of individual student achievement and progress				R			
To designate a teacher to be responsible for coordinating SEND provision				R			
To make provisions for SEND students with or without an EHCP				R			
Review and implement strategies for pupil premium pupils in terms of educational outcomes and narrowing the gap for the school				R			
Collective worship arrangements are in place for the school				R			
Set the opening and closing times for the school				R			
Ensure the school lunch is provided to appropriate nutritional standards				R			
Ensure the wellbeing of all pupils through implementation of wellbeing strategies for the school				R			
Trustees							
Appoint a link trustee with ownership for assurance of SEND					A		
Carries the ultimate responsibility for the overall performance of the Partnership and the schools within the Partnership					A		
Set term dates and length of school day					A		
Appoint a Trustee with responsibility for SEN and Disability and that they ensure the TB knows and understands the achievement and learning of different groups of students				R			
Comply with the LA in relation to ‘Local Offer’ for students				R			
Ensure the school has a SEND Policy that is reviewed annually				R			

Estates and Operations	R	A	C	I
CEO				
Develop the overall strategic plan for capital expenditure taking into account the individual schools' strategic plans	R			
Arrange insurance for the Partnership	R			
Oversee premises management and security		A		
Oversee public relations and marketing activities, including Partnership website	R	A		
Executive Team				
Develop the wider estates plan in line with the Partnership's strategy	R			
Monitor statutory compliance with regulations relating to premises on behalf of the Board	R			
Provide the TB and schools with professional support and advice relating to the management of buildings, security and the estate	R			
Arrange insurance for the Partnership	R			
Update Partnership website content	R			
Governors				
Receive summary maintenance plans in order to understand any planned capital works and the impact of the strategic plan on the quality of the school buildings				I
Headteachers				
With the professional support of services is responsible for the maintenance of the school and its facilities	R			
Trustees				
Approve the annual strategic capital expenditure plan		A		
Monitors the wider estates plan		A		
Ensure insurance is in place for the Partnership		A		

Financial Planning	R	A	C	I
CEO				
Comply with all funding agreement obligations and ensure appropriate financial controls (accountable to ESFA)		A		
Act as accounting officer for the trust		A		
Set and deliver agreed budgets to secure financial health across the partnership, including top slice and capital plan (FGP)	R	A		
Monitor statutory compliance, reporting and the financial performance of the schools	R			
Approve spend/order business case for spend/orders greater than £15k and up to £75k for the trust overall	R			
Authorisation to exercise virements between costs centres for items of expenditure costing up to £15,000 including the application of contingency or unallocated funds	R			
Receive reports from the CFOO	R			

Financial Planning	R	A	C	I
CFOO				
Comply with all Funding Agreement obligations and ensure appropriate financial controls/reporting	R			
Formulate and set a 3-year forecast for Partnership annual budget (FGP)	R			
Obtaining a quote in advance is best practice for spend/orders less than £1k by TWP	R			
Must obtain a quote or price confirmation in advance of spend/orders for items between £1k and £5k by TWP	R			
Approve CIF contributions greater than £10k or 20% (whichever is lower) up to £20K	R			
Must obtain 3 quotes, and demonstrate evidence on best value for money, for all new orders greater than £5k and less than £40k for procurement by TWP	R			
Full tender process for spend/orders greater than £40k and less than the public contract regulations limit (subject to relevant approval limits)	R			
Approve all leases entered into by the trust and ensure that they comply with statutory obligations.	R			
Acts on behalf of the Partnership to enable them to discharge their duties in relation to statutory compliance and the financial performance of schools	R			
Ensure VAT compliance	R			
Consolidate the capital plan	R			
Ensure the entry on the Register of Data Controllers is up to date and accurate	R			
Informing the Trust Board of any offered donations (monetary and physical), to the Partnership and any of its schools	R			
Provide professional services for accounting, financial planning, policies and financial systems across the whole Partnership	R			
Together with the Headteacher; develop capital expenditure priorities against the schools' SIP for submission to the board	R			

Financial Planning	R	A	C	I
Governors				
Comply with Funding Agreement obligations for schools	R			
On outcome of the final budget				I
Propose capital plan				I
The decision by the Trust Board of approval/rejection of donations offered				I
Headteacher				
Advising the CFOO of any offers of donations received for approval by the Trust Board	R			
Approve CIF contributions up to £10K or 20% of surplus budget (whichever is lower)	R			
Ensure the school cooperates with internal and external audit and implements action plans swiftly	R			
Obtaining a quote in advance is best practice for spend/orders less than £1k	R			
Must obtain a quote or price confirmation in advance of spend/orders for items between £1k and £5k	R			
Approve spend/order business case for spend/orders up to £15k	R			
Must obtain 3 quotes, and demonstrate evidence on best value for money, for spend/orders greater than £5k and less than £40k. Complete dispensation form if 3 quotes not achievable.	R			
Gain approval from the CFOO/CEO for any operating or finance leases	R			
Together with the CEO/CFOO; prepare the budget for approval by the Trust Board and is responsible for controlling costs and for ensuring the budget commitments are met	R			
Develop capital expenditure priorities against the school's SIP for submission to the CEO and board	R			

Financial Planning	R	A	C	I
Members				
Annually appoint auditors and ensure robust external audit processes		A		
Receive signed annual accounts for statutory financial reporting from CEO/CFOO/TB				I
Trustees				
Comply with all Funding Agreement obligations and ensure appropriate financial controls/reporting		A		
Annually appoint auditors and ensure robust internal audit processes (delegated to FGP)	R			
Agree and develop funding across the Partnership to secure financial health, including capital plan & top slice		A		
Approving or rejecting offered donations (monetary and physical), to the Partnership and any of its schools		A		
Develop the overall strategic plan for the finances of the Partnership as a whole and of the schools		A		
Formally approve the overall budget and delegates budgets to individual schools in the summer term; advises the Board with respect to financial priorities in light of strategic plan		A		
Fully compliant public contract regulations tender procedure for orders and contracts as determined by Public Contract Regulations limits		A		
Is legally accountable for the Trust's assets and accounts		A		
Set the financial parameters within which the school budgets are created		A		
Receive summary management accounts from the Finance team in order to ensure the Board is fully aware of the Trust's and individual school's financial performance				I
Approve CIF contributions greater than £20k at a primary school and £40k at a middle school	R			
Approve spend/order business case for orders between £75K and the Public Contracts Regulations limits	R			
Approve spend/order business case for spend/orders over the Public Contract Regulations limits	R			
Authorisation to exercise virements between costs centres for items of expenditure costing above £15,000 including the application of contingency or unallocated funds	R			

Governance	R	A	C	I
CEO				
Carry out delegated duties from the board	R			
Complete register for business interest for TB	R			
Appoint clerk to TB and LGB	R			
CFOO				
Ensure the TB receive papers in advance of meetings (7 days in advance)	R			
Provide the TB and LGBs with advice and guidance to help them improve and evaluate their processes and effectiveness			C	
Provides administrative support for the TB	R			
Work with the Clerk to Governors/Trustees and SLA providers to ensure board/committee meetings are arranged and run effectively	R			
Support the TB and LGBs with their training and new member induction	R			
Governors				
Ensure its own processes are line with the legal requirements as set down in the Articles of Association		A		
Responsible for LGB Code of Conduct	R			
Approve/decline the removal of a Governor in LGBs	R			
Appointing members in accordance with the link governance requirements	R			
Evaluate its own processes and effectiveness	R			
Own training and new member induction	R			
Represents the LGB when required on TB	R			
Succession planning and the recruitment of LGB members to ensure an appropriate balance of skills and effectiveness	R			
Headteachers				
Act as a Governor on the LGB	R			
Ensure LGBs receive papers in advance of meetings (7 days in advance)	R			
Ensure meetings are carried out in line with the terms of reference and this SoD	R			
Complete register for business interest for FGB	R			

Governance	R	A	C	I
Members				
Appointment and dismissal of Trustees		A		
Of an Interim Advisory Board in a school where governance is not meeting the statutory or education requirements				I
Trustees				
Has legal responsibility for statutory compliance		A		
Legally responsible for the Trust, the schools and their governance		A		
May delegate responsibilities to the LGBs (ratified by TB)		A		
Responsible for Code of Conduct for TB	R	A		
Register for business interest compliance		A		
Responsible for its own processes in line with the legal requirements as set down in the Articles of Association		A		
To appoint an Interim Advisory Board in a school where governance is not meeting the statutory or education requirements		A		
Prepare and agree terms of reference for TB Committees and LGBs	R	A		
In receipt of FGB reports				I
Appoint the chair and vice chair from amongst their membership annually	R			
Appointing members in accordance with the link governance requirements	R			
Appointing Trustees to support LGBs where identified, as a Trustee Appointed Governor	R			
Evaluating its own processes and effectiveness	R			
Own training and new member induction	R			
Succession planning and the recruitment of the Trust Chair, Board members to ensure an appropriate balance of skills and effectiveness	R			

Health and Safety	R	A	C	I
CEO				
Monitor and review the implementation of the risk register	R			
CFOO				
Maintain the risk register, reporting to the Audit and Risk Assurance Committee, and ensuring all actions agreed are carried out	R			
Governors				
Ensure H&S regulations are followed (standard agenda item)	R			
Headteachers				
Commission professional health and safety audits with follow-up support and guidance at school level, including asbestos survey	R			
Implement recommendations from the professional health and safety audits	R			
Implement the Partnership's health and safety policies, guidance and training in their school	R			
Monitor the implementation of the health and safety guidance and policies	R			
Monitor and report statutory compliance termly to FGB and CEO	R			
Trustees				
Approval of overall health and safety policies		A		
Monitors the H&S risk register	R			

HR Management	R	A	C	I
CEO				
Recruitment and appointment of the Executive Team/Headteachers of schools and consulted on the recruitment of Senior Leaders	R			
Approve staffing structures ensuring they are fit for purpose and affordable		A		
Consider changes to staffing roles and pay grades and provide recommendations accordingly to Trustees	R			
Define Partnership executive & senior leadership structure	R			
Has the authority to dismiss, any member of staff across the Partnership in accordance with the disciplinary policy	R			
Performance management of the Executive Team and Headteachers of each school and recommendation for incremental pay progression	R	A		
To appoint, suspend and dismiss members of the Executive Team	R			
Outcome of any pay, grievance, capability or disciplinary process				I
The recruitment and appointment of DHT/AHT/school staff, including advertising approval			C	
Governors				
Contribute to the appointment of the Headteacher			C	
Contribute to the performance management of the Headteacher			C	
Is fully aware of the school's activity in terms of its staff, staffing structures and more general HR data and can support and challenge appropriately				I
Participate in appeals as part of the pay, grievance, capability or disciplinary process which are not likely to have a gross misconduct outcome	R			

HR Management	R	A	C	I
Headteachers				
Ensure the school staffing structure is fit for purpose and affordable		A		
Define their own school staffing structure within budget constraints	R			
Ensure all staffing policies are implemented	R			
Accuracy of the school's Single Central Record and statutory compliance with respect to training for safer recruitment	R			
Has the authority to dismiss in line with Partnership policy	R			
Hearing cases as part of the pay, grievance, capability or disciplinary process and issuing outcome as appropriate or referring to the trust board where gross misconduct may be an outcome	R			
Implement the performance management programmes for all staff in the school and recommendation for incremental pay progression	R			
Propose a managing staff reduction plan	R			
Provide business case to CEO for approval of changes to staffing roles and pay grading	R			
To suspend/dismiss staff in consultation with the CEO	R			
The recruitment and appointment of DHT/AHT/school staff, including advertising approval, in consultation with the CEO	R			
Trustees				
Approve changes to staffing structure, roles and pay grades		A		
Consider approval of recommended pay progressions of executive leaders		A		
Consider approval of recommended pay progressions of staff		A		
Ensure the managing staff reduction process is fair and equitable		A		
Ensure the Partnership leadership team structure is fit for purpose and affordable		A		
Adjustments to staffing structures in the relevant school				I
Has the authority to dismiss CEO/Executive Team/Senior Leaders including headteachers from any school	R	A		
Performance management of the CEO/Executive Team and approval of incremental pay progression	R	A		
The recruitment and appointment of the Chief Executive/Headteachers (refer to Appointment Grid)	R	A		

Information Management	R	A	C	I
CEO				
Monitor and review data protection procedures	R			
CFOO				
Ensure registration with the Information Commissioner Officer (ICO)	R			
Maintain accurate and safe staff records for the Central Team	R			
Support the schools with the effective safe storage of data	R			
Ensure Information Technology has the appropriate cyber security protection	R			
Any financial demands relating to cyber security to be informed to the Audit Committee and Trust Board	R			
Ensure systems comply with Information management legislation with relation to students, parents/carers, staff and the wider community	R			
Ensure the effective implementation of the data protection policies and procedures in the school	R			
Ensuring cyber security protection and ransomware protection is in place across the Partnership	R			
Headteachers				
Liaise with DPO on all freedom of information and subject access requests	R			
Any financial demands relating to cyber security to be informed to the CEO	R			
Ensure compliance with all Data Protection legislation and good practice in the school	R			
Ensure the publication of school information ensuring all electronic communication including websites are up to date	R			
Ensuring school website and GIAS is compliant and up to date	R			
Maintain accurate and secure staff records	R			
Maintain accurate and secure student's records	R			
Managing all freedom of information and subject access requests	R			

Information Management	R	A	C	I
Trustees				
Ensure compliance with all data protection legislation and good practice across the schools		A		
Informed by the headteacher on all freedom of information and subject access requests				I
Cyber security and ransomware protection is in place and is adequate				I
Any financial demands relating to cyber security to be referred to the ESFA	R			
To approve data protection policies and procedures for schools, including; - The requirement to notify individuals as to how information is to be used - Safe storage	R			

Professional Development	R	A	C	I
CEO				
Review with the Headteacher their professional development plans for staff		A		
Executive Team				
Design, develop, commission and deliver professional development programmes	R			
Lead the strategic vision and provide support for professional development, training, induction, talent development and succession planning across the Partnership	R			
Governors				
Receive professional development and training summary reports from the Headteacher in order to ensure the LGB is fully aware of the school's activity in this area and can support and challenge appropriately				I
Headteachers				
Contribute to the Trust wide professional development and network programmes	R			
Design, develop, commission and deliver professional development programmes at school level	R			
Develop and implement the school's strategy for professional development	R			
Ensure induction and probation are highly effective for all staff	R			
Ensure the school is focused on talent management	R			
Has a clear plan for succession planning for all key posts	R			
Trustees				
Ensure sufficient resources are allocated to professional development across the Partnership	R			

Quality of Teaching	R	A	C	I
CEO				
Support and challenge Headteachers with their systems for monitoring the quality of teaching	R			
Support, challenge and advise the school on its improvement plan	R			
Governors				
Know and understand the school's own evaluation of the quality of teaching	R			
Support and challenge the school on its improvement plan	R			
Headteachers				
Accurate self-evaluation of the quality of teaching, its strengths and weaknesses and for implementing action to address this	R			
Ensure external view / validation in terms of these judgments	R			
Quality of teaching in the school, ensuring consistent good or better teaching leads to high quality outcomes for all students	R			
Trustees				
Ensure sufficient resources are allocated to deliver the highest possible quality of teaching		A		

Safeguarding and Child Protection	R	A	C	I
CEO				
Monitor statutory compliance with respect to safeguarding and child protection		A		
Ensure all schools are working effectively in a multi-agency approach, to support the safety of children and young people	R			
Maintain high-level professional development in relation to this area	R			
Receive HT reports including attendance, exclusions, punctuality and disciplinary matters				I
Governors				
Receive summary reports including child protection, exclusions, attendance, behaviour in order to ensure the LGB is fully aware of the school's activity in this area and can support and challenge appropriately		A		
Ensure underperformance is challenged at school level	R			
Undertake annual training	R			
Headteachers				
Statutory compliance of safeguarding and child protection in the school		A		
Ensure a fully trained DSL is in place	R			
Ensure all staff receive annual training in line with statutory responsibilities	R			
Ensure that a named person for Looked After Children is in place	R			
Ensure that the school responds to local and national need/priorities	R			
Ensure timely completion of all audits relating to safeguarding	R			
Implementation of safeguarding and child protection policies and best practices within the school	R			
Monitor attendance, exclusions, punctuality and disciplinary matters for the school	R			
Provide reports for the LGB	R			
Trustees				
Receive reports and review as appropriate				I

Strategic Planning	R	A	C	I
CEO				
Approve the individual School Improvement Plans		A		
Comply with regulations (including charity law, employment law, health & safety)		A		
Implement the Strategic Plan for The Wulfruna Partnership	R			
Provide professional support and encouragement to the school(s) in developing and implementing its School Improvement Plan	R			
Review schools' evaluation of the SIP and provide challenge when required	R			
Review and approve Partnership Policies (refer to Management Cycles)	R			
Manage legal claims that potentially could impact the Partnership & Schools	R			
Manage and mitigate risk	R			
CFOO				
Comply with regulations (including charity law, employment law, health & safety)	R			
Implement the TWP strategic plan	R			
Provide templates and support for strategic documents	R			
Manage and mitigate risk			C	
Governors				
Together with the Headteacher; oversee the development and regular updating of the school's improvement plan (SIP)		A		
Together with the Headteacher; develop the school's 2-year Strategic Improvement Plan (SIP), including KPIs	R			
Acting as a critical friend when scrutinising the self-evaluation	R			
Review and approve school level policies		A		
Manage admission application decisions and appeals for the school		A		

Strategic Planning	R	A	C	I
Headteachers				
Together with the LGB; develop the school's 2-year School Improvement Plans for approval by the Trust Board, including KPI's	R			
Implement the 2-year School Improvement Plan (SIP)	R			
Monitor and evaluate	R			
Review and approve school level policies	R			
Manage and mitigate risk at school level	R			
Trustees				
Comply with regulations (including charity law, employment law, health & safety)		A		
Develop and monitor the overall strategic plan for The Wulfruna Partnership		A		
Review and approve Partnership Policies		A		
Manage legal claims that potentially could impact the Partnership & Schools		A		
Manage and mitigate risk		A		

Vision	R	A	C	I
CEO				
Consult LGB and Headteachers to set and communicate a clear vision for the Partnership	R			
Governors				
Ensure their school has a clear vision in place, which is regularly reviewed and communicated widely (accountable to TB)	R			
Together with the Headteacher; the Chair ensures the views of the LGB are well communicated to the Trust Board	R			
To be well informed about standards in school and progression towards the school's vision	R			
Headteachers				
Implement the school vision as determined by the LGB	R			
Together with the LGB Chair; ensure the views of the LGB are well communicated to the Trust Board	R			
Together with the LGB Chair; ensure LGB members have all the information they require to be well informed about both the school and Wulfruna Partnership schools	R			
Trustees				
Set a clear vision for the Trust and the schools (accountable to ESFA and Ofsted)		A		