

FORWARD EDUCATION TRUST
Scheme of Delegation
September 2024

This Scheme:

- sets out the Trust’s approach to delegations between the different layers of governance within the Trust and is a delegation by the Trustees under Article 105 of the Articles of Associations of certain powers and/or functions as detailed below.
- confirms which powers and functions are reserved to the Trustees.
- should be read in conjunction with the Trust’s Committee Terms of Reference.
- may only be altered or revoked by the Trustees.

At all levels of delegation, the trustees retain the right to withdraw delegation of certain responsibilities or functions if performance in the delegated area is a cause for concern. For example, if a school’s leadership and management is judged to be inadequate, the trustees may wish to take responsibility for governance at a local level to ensure the correct support and scrutiny is in place.

The Trust’s Scheme of Financial Delegation, which the Trust is required to have under the Academy Trust Handbook, is set out at the end of this document. The Scheme is divided into four sections as follows:

- Strategy & Leadership.
- Education & Curriculum.
- HR & Operations.
- Financial.

To assist interpretation of the matters delegated in the Scheme it uses defined phrases which are supplemented by additional comment as appropriate. The defined phrases should be given their common meaning but for the avoidance of doubt an explanation can be found on the final page of this Scheme.

STRATEGY AND LEADERSHIP

	Members	Trustee Board (may delegate to a committee in accordance with terms of reference)	CEO (may delegate to a member of the Executive Team)	Local Academy Council (LAC)	Headteacher	Notes
1.i Set strategic objectives of the Trust	Informed	Accountable	Responsible	Informed	Consulted	
1.ii Set strategic objective of the Academies	Informed	Informed	Accountable	Consulted	Responsible	Academy specific, co-created in partnership, aligned to the strategic objectives of the Trust
2.i Develop the character, mission & ethos of Trust	Informed	Accountable	Responsible	Informed	Consulted	Co-created in partnership
2.ii Develop the character, mission & ethos of Academies	Informed	Informed	Accountable	Responsible	Responsible	Academy specific, co-created in partnership, aligned to those of the Trust
3.i Deliver strategic objectives of the Trust	Informed	Accountable	Responsible	Informed	Consulted	
3.ii Deliver strategic goals and milestones of the Academies	Informed	Informed	Accountable	Consulted	Responsible	Academy specific, aligned to those of the Trust
4.i Scrutiny: Performance – review & challenge progress of the Trust against its strategic objectives and KPIs	Accountable	Responsible	Consulted	Informed	Informed	
4.ii Scrutiny: Performance – review & challenge progress of the Academies against their strategic objectives and KPIs	Informed	Accountable	Responsible	Consulted	Consulted	Academy specific
5.i Scrutiny: Ethos – operation of the Trust against the agreed character, mission & ethos	Accountable	Responsible	Consulted	Informed	Informed	

STRATEGY AND LEADERSHIP

	Members	Trustee Board (may delegate to a committee in accordance with terms of reference)	CEO (may delegate to a member of the Executive Team)	Local Academy Council (LAC)	Headteacher	Notes
5.i Scrutiny: Ethos – operation of the Academies against the agreed character, mission & ethos	Informed	Accountable	Responsible	Consulted	Consulted	Academy specific
6. Compliance: Funding Agreement – comply with all obligations including the Academies Handbook	Informed	Accountable	Responsible	Informed	Consulted	
7. Compliance: Regulatory – with all regulations affecting the Trust (including all charity law, company law, employment law and health and safety)	Informed	Accountable	Responsible	Informed	Informed	At a Trust level, the CEO will report to the Trustee Board. At an Academy level, the Headteacher will report to LAC and CEO
8. 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	Informed	Accountable	Responsible	Informed	Informed	
9. Compliance – completing the register of business interests and put in place a procedure to deal with any conflicts of interest and connected party transactions	Informed	Accountable	Responsible	Informed	Consulted	

STRATEGY AND LEADERSHIP

	Members	Trustees (may delegate to a committee in accordance with terms of reference)	CEO (may delegate to a member of the Executive Team)	Local Academy Council (LAC)	Headteacher	Notes
10.i Statutory Documents - Trust Risk Register	Informed	Accountable	Responsible	Informed	Consulted	The CEO must manage the strategic risk register for review by the Trustee Board. Headteachers must report to the LAC (and CEO) on risks at Academy level
10.ii Statutory Documents – Articles of Association	Informed	Accountable	Responsible	Informed	Informed	
10.iii Statutory Documents – Scheme of Delegation	Informed	Accountable	Responsible	Informed	Informed	
11.i Appointment/removal of Members – ensuring that Members have the skills to fulfil their statutory duties	Accountable and Responsible	Consulted	Informed	Informed	Informed	
11.ii Appointment or removal of Trustees – ensuring that the Trustees have the skills to run the Trust	Accountable	Responsible	Consulted	Informed	Informed	Trustees have the power to co-opt Trustees in accordance with the Articles of association
11.iii Trust Appointment of Local Academy members – ensuring that they have the skills to run the Academies	Informed	Accountable	Responsible	Consulted	Consulted	
11.iv LAC Appointment of Local Academy members (parent, staff and community representatives)	Informed	Informed	Consulted	Accountable	Responsible	Ensuring that they have the skills to support the Headteacher. Staff and parent representatives appointed by election. Community Members formally appointed by the Trustee Board.
12.i Appointment/removal of Trust Board Committee Chairs	Informed	Accountable and Responsible	Consulted	Informed	Informed	

STRATEGY AND LEADERSHIP

	Members	Trustees (may delegate to a committee in accordance with terms of reference)	CEO (may delegate to a member of the Executive Team)	Local Academy Council (LAC)	Headteacher	Notes
12.ii Appointment/removal of LAC Chairs	Informed	Accountable	Responsible	Consulted	Consulted	
12.iii Appointment of Safeguarding Trustee	Informed	Accountable and Responsible	Consulted	Informed	Informed	
13.i Appointment of School Governance Professional to the Trust Board	Informed	Accountable	Responsible	Informed	Informed	
13.ii Appointment of School Governance Professional to the LAC boards	Informed	Accountable	Responsible	Consulted	Informed	
14.i Policies – review and approval of Trust Wide Policies	Informed	Accountable	Responsible	Consulted	Consulted	Delegated to Committees or the Executive Leadership as per Policy Review schedule
14.ii Policies – review and approval of Academy specific policies	Informed	Informed	Informed	Accountable	Responsible	Delegated to LAC or HT as per policy review schedule.
15. Prepare terms of reference for LACs and Committees	Informed	Accountable	Responsible	Consulted	Consulted	
16.i Training programme for the Trustees	Informed	Accountable	Responsible	Informed	Informed	
16.ii Training programme for LAC members	Informed	Accountable	Consulted	Responsible	Consulted	
17.i Completing a skills audit annually and recruiting to fill gaps(Board)	Informed	Accountable	Responsible	Consulted	Informed	
17. ii Completing a skills audit annually and recruiting to fill gaps (Local Academy Council)		Informed	Informed	Accountable	Responsible	

STRATEGY AND LEADERSHIP

	Members	Trustees (may delegate to a committee in accordance with terms of reference)	CEO (may delegate to a member of the Executive Team)	Local Academy Council (LAC)	Headteacher	Notes
18. Completing annual self-evaluation at Board level and LAC level		Accountable and Responsible	Responsible	Responsible	Consulted	
19.i Managing Succession on the Trustee Board, monitoring performance and contribution	Accountable	Responsible	Consulted	Informed	Informed	
19.ii Managing Succession on the LAC boards, monitoring performance and contribution		Accountable	Responsible	Responsible	Responsible	
20.i Developing an annual schedule of governance business (Board & Committees)	Informed	Accountable	Responsible	Informed	Informed	
20.ii Developing an annual schedule of governance business (LACs)		Accountable	Responsible	Consulted	Consulted	
21. Publishing governance arrangements on Trust and academies websites	Informed	Accountable	Responsible	Informed	Informed	
22. Submitting to Members and publishing an annual report on the performance of the Trust	Informed	Accountable	Responsible	Consulted	Consulted	

EDUCATION AND CURRICULUM

	Members	Trustees (may delegate to a committee in accordance with terms of reference)	CEO (may delegate to a member of the Executive Team)	Local Academy Council (LAC)	Headteacher	Notes
1. Academy Development Plan for each academy in line with the strategic aims of the Trust	Informed	Informed	Accountable	Consulted	Responsible	The Headteacher will work with the CEO to develop, produce and review the plan for each academy
2.i KPIs for the Trust	Informed	Accountable	Responsible	Informed	Consulted	
2.ii KPIs for each academy	Informed	Informed	Accountable	Consulted	Responsible	The Headteacher is responsible for delivering academy performance against the KPIs for scrutiny by the CEO and LAC
3. Quality of Teaching - ensuring appropriate levels of support, challenge and intervention to support delivery of outcomes	Informed	Informed	Accountable	Consulted	Responsible	The headteacher should report concerns about the quality of teaching to the LAC and CEO
4. Setting the curriculum for the Academies and reviewing its effectiveness	Informed	Informed	Accountable	Consulted	Responsible	Trustees will review effectiveness of the curriculum across the Trust
5. Curriculum - ensuring that legal requirements specified in EHCPs are met and that pupils are given support for learning.	Informed	Informed	Accountable	Consulted	Responsible	CEO will report to Trustees on the effectiveness of this across the Trust. HTs report to their LAC on the curriculum and ensuring that legal requirements are met in their school.
6. Curriculum - ensuring Parental satisfaction with EHCPs, personalising the curriculum to reflect a pupil's aspiration as expressed in their EHCP.	Informed	Informed	Accountable	Consulted	Responsible	CEO will report to Trustees on the effectiveness of this across the Trust. HTs report to their LAC on the curriculum, personalisation and parental satisfaction in their school.

EDUCATION AND CURRICULUM

	Members	Trustees (may delegate to a committee in accordance with terms of reference)	CEO (may delegate to a member of the Executive Team)	Local Academy Council (LAC)	Headteacher	Notes
6. Pupil Premium – reviewing and challenging value for money of Pupil Premium spend in terms of educational outcomes and narrowing the achievement gap, plus Primary Sports Grant, Year 7 Literacy & Numeracy Catch-up, 16-18 student bursary)		Informed	Accountable	Consulted	Responsible	CEO will report to Trustees on the effectiveness of the use of Pupil Premium and other grants across the Trust. HTs report to their LAC on the use of PP and other grants in their school.
7. Collective worship arrangements for school without religious character	Informed	Informed	Accountable	Consulted	Responsible	
8. Approve Admissions Policy (Trust is admissions authority)	Informed	Accountable	Responsible	Consulted	Consulted	
9. Admissions decisions	Informed	Accountable	Consulted	Informed	Responsible	Unless otherwise directed by Tribunal decision
10.i Reviewing and evaluating performance of the Trust	Informed	Accountable	Responsible	Consulted	Consulted	

EDUCATION AND CURRICULUM

	Members	Trustees (may delegate to a committee in accordance with terms of reference)	CEO (may delegate to a member of the Executive Team)	Local Academy Council (LAC)	Headteacher	Notes
10.ii Reviewing and evaluating performance of each academy in terms of <ul style="list-style-type: none"> • progress against KPIs • academic performance, quality of care and quality of provision • overall effectiveness and efficiency of leadership and management • quality of teaching and learning 		Informed	Accountable	Consulted	Responsible	CEO will report to Trustees on performance in each school and across the Trust. HTs report to their LAC on performance in their school
11. Self-evaluation at academy level		Informed	Accountable	Consulted	Responsible	HTs also report to and involve their LAC in self-evaluation in their school
12. Reviewing priorities for raising standards of achievement	Informed	Accountable	Responsible	Consulted	Consulted	
13. Termly reporting	Informed	Accountable	Responsible	Informed	Consulted	Through Education Committee of all matters required, driven by the School Improvement Strategy and School Improvement Plans
14. Student issues		Informed	Informed	Accountable	Responsible	Headteacher will ensure compliance with Trust / Academy policies and report any material issues to the LAC
15. Student emotional health and wellbeing		Informed	Informed	Accountable	Responsible	Headteacher will ensure compliance with Trust / Academy policies and report any material issues to the LAC

EDUCATION AND CURRICULUM

	Members	Trustees (may delegate to a committee in accordance with terms of reference)	CEO (may delegate to a member of the Executive Team)	Local Academy Council (LAC)	Headteacher	Notes
16. Academy hours, term dates and length of school day	Informed	Accountable	Consulted	Consulted	Responsible	
17. School lunch provided to appropriate nutritional standards		Informed	Accountable	Informed	Responsible	HT will seek assurance on this from school lunch provider
18. Provision of free school meals to those meeting criteria		Informed	Accountable	Informed	Responsible	
19. Safeguarding in each academy ie appointment of Designated Safeguarding Lead, compliance with statutory guidance and maintenance of Single Central Record		Informed	Accountable	Accountable	Responsible	CEO accountable for Trust, LAC Accountable for school
20. Stakeholder engagement – partnerships, consultations and use of feedback to develop best practice and promote the quality of learners’ experiences		Informed	Informed	Accountable	Responsible	
20.i Ofsted Inspections – Trust inspection or Trust support for academy inspections	Informed	Accountable	Responsible	Informed	Consulted	
20.ii Ofsted inspections – individual academies	Informed	Accountable	Consulted	Responsible	Responsible	

HR AND OPERATIONS

	Members	Trustees (may delegate to a committee in accordance with terms of reference)	CEO (may delegate to a member of the Executive Team)	Local Academy Council (LAC)	Headteacher	Notes
1. Appointing CEO		Accountable		Consulted	Consulted	
2. Appointing Trust Executive Team eg CFO, COO	Inform	Accountable	Responsible	Consulted	Consulted	
3. Appointing of cross-Trust staff		Accountable	Responsible	Consulted	Consulted	
4. Appointing the Headteacher at each academy	Informed	Accountable	Responsible	Consulted		
5. Appointing Deputy Head at each academy	Informed	Informed	Accountable	Informed	Responsible	
6. Appointing SLT (other than HT and DHT) at each academy		Informed	Consulted	Informed	Accountable	
7. Establishing Trustwide HR policies	Informed	Accountable	Responsible	Consulted	Consulted	
8. Ensuring emotional health and wellbeing of staff is promoted	Informed	Accountable	Responsible	Consulted	Consulted	
9. Establishing staff performance management/appraisal policy and pay reviews	Informed	Accountable	Responsible	Consulted	Responsible	The Chair and Vice-Chair of the Board will undertake performance management of the CEO. Headteachers are responsible for the performance management of their own staff
10. Establishing and periodically reviewing the terms and conditions of employment and the staff handbook	Informed	Accountable	Responsible	Consulted	Consulted	
11.i Dismissing the CEO (in accordance with appropriate HR policies)	Informed	Accountable		Informed	Informed	

HR AND OPERATIONS

	Members	Trustees (may delegate to a committee in accordance with terms of reference)	CEO (may delegate to a member of the Executive Team)	Local Academy Council (LAC)	Headteacher	Notes
11.ii Dismissing senior staff (other than the CEO) in the central Trust team and the academies (in accordance with appropriate HR policies)		Accountable	Responsible	Informed	Informed	
11.iii Dismissing any other staff (in accordance with appropriate HR policies)		Accountable	Responsible	Informed	Informed	
12. Reviewing Disciplinary and Grievance policy		Accountable	Responsible	Consulted	Consulted	
13.i Setting Trust-wide procurement policies		Accountable	Responsible	Informed	Consulted	
13.ii Setting academy specific procurement policies		Accountable	Responsible	Informed	Consulted	
14. Entering into contracts up to the limit of delegation set out in the Scheme of Financial Delegation		Accountable	Responsible	Informed	Consulted	
15. Determining and allocation of central services provided to the academies by the Trust		Accountable	Responsible	Informed	Consulted	
16. Overseeing the effectiveness of services provided centrally by the Trust		Accountable	Responsible	Consulted	Consulted	

HR AND OPERATIONS

	Members	Trustees (may delegate to a committee in accordance with terms of reference)	CEO (may delegate to a member of the Executive Team)	Local Academy Council (LAC)	Headteacher	Notes
17. Asset and premises maintenance strategy – determining use of premises and ensuring they are adequately maintained		Accountable	Responsible	Consulted	Consulted	LAC are consulted on the academy plan in accordance with Trust policy and will review delivery of the academy plan
18. Acquiring and disposing of Trust land and buildings	Accountable	Responsible	Consulted	Consulted	Consulted	
19. Changing use of assets	Informed	Accountable	Responsible	Consulted	Consulted	LAC will recommend to the Trust board any changes to fixed assets used by the academy.
20. Arranging insurance for the trust		Accountable	Responsible	Informed	Consulted	
21. Media and PR – overseeing public relations activities of the academies		Informed	Accountable	Consulted	Responsible	
22. Information management including policies, compliance, GDPR, FOI, staff and student records		Accountable	Responsible	Informed	Consulted	Policies may be delegated to Board Committees, as per the Policy review schedule. Generally policies relating to HR will involve consultation with JCNC as part of the process
23.i Trust prospectus and website		Accountable	Responsible	Consulted	Consulted	
23.ii Academy prospectus and website		Consulted	Consulted	Accountable	Responsible	
24. i Media and PR relating to the Trust’s activities and reputation	Informed	Consulted	Accountable	Informed	Responsible	
24. ii Media and PR relating to a school’s activities and reputation	Informed	Informed	Consulted	Responsible	Accountable	

FINANCIAL

	Members	Trustees (may delegate to a committee in accordance with terms of reference)	CEO (may delegate to a member of the Executive Team)	Local Academy Council (LAC)	Headteacher	Notes
1. Appointment of the Audit & Risk Committee	Informed	Accountable and Responsible	Informed	Informed	Informed	
2. Appointment of the Accounting Officer & Chief Financial Officer	Informed	Accountable and Responsible	Informed	Informed	Informed	
3. Recommend appointment of External Auditors to the Members	Informed	Accountable	Responsible	Informed	Informed	
4. Appointment of the Internal Auditors	Informed	Accountable	Responsible	Informed	Informed	
5. Approve Annual Accounts	Informed	Accountable	Responsible	Informed	Informed	CEO and CFO must arrange for auditing and filing of annual report and accounts
6. Establishing policies and procedure to ensure compliance with the Trust's financial and reporting requirements, including the Scheme of Financial Delegation	Informed	Accountable	Responsible	Consulted	Consulted	
7. Setting up bank accounts and approving bank mandates in the name of the Trust	Informed	Accountable	Responsible	Informed	Informed	
8. Agreeing a funding model across the Trust and developing an individual funding model for the academies to secure the Trust's financial health in the short, medium and long term	Informed	Accountable	Responsible	Informed	Informed	The CEO to recommend a funding model to the Trustee Board for approval. LACs review compliance with the overall financial plan for their academy.

FINANCIAL

	Members	Trustees (may delegate to a committee in accordance with terms of reference)	CEO (may delegate to a member of the Executive Team)	Local Academy Council (LAC)	Headteacher	Notes
9. Formulating and setting the Trust wide budget and the proportion delegated to each academy	Informed	Accountable	Responsible	Consulted	Consulted	
10. Expenditure and ensuring delivery of annual budgets	Informed	Informed	Accountable	Consulted	Responsible	<p>CEO is accountable for delivery against annual budget for Central services.</p> <p>CEO to report to Trustees any material issues with delivery against the annual budget by academies.</p> <p>LACs to review performance against budget and report to the CEO any issues with expenditure or compliance.</p> <p>Headteacher to report to the LAC any matters of concern in relation to the academy's annual budget.</p> <p>Headteachers must manage their overall staffing costs within the agreed budget.</p> <p>Changes to individual pay scales for roles must follow the approved evaluation process and be agreed with the CEO</p>
11. Reporting on financial KPIs	Informed	Accountable	Responsible	Informed	Consulted	
12. Agreeing the investment policy in line with the Academies Handbook and the Scheme of Financial Delegation	Informed	Accountable	Responsible	Informed	Informed	

FINANCIAL

	Members	Trustees (may delegate to a committee in accordance with terms of reference)	CEO (may delegate to a member of the Executive Team)	Local Academy Council (LAC)	Headteacher	Notes
13. Severance payments in accordance with ESFA guidance	Informed	Accountable	Responsible	Informed	Informed	
14. Annual pay awards (cost-of-living) – the Trust follows STPCD and is guided by NJC settlement		Accountable	Responsible	Informed	Informed	Abides by STPCD for teachers. The Trust has its own support staff pay scales, but is guided by the national NJC settlement
15. Procurement and ordering goods and services. Approval of contracts up to one year (subject to values quoted) can be made by Academy Headteachers. All contracts over one year are approved by the CEO, subject to approval on the financial authorisation limits detailed here and in the Finance Policy at 4.3 with the appropriate body. For details relating to requirements for written quotes and tendering, refer to 33.1 of the Finance Policy.		Board £100,001 and above ARF £50,001 to £100,000	£2,501 to £50,000		Up to £2,500	Refer to the relevant section of the Finance Policy
16. Authorisation of BACS payments			Accountable			BACS and other payments are authorised under dual control by the CEO and CFO, up to a limit of £1.75m. If this limit is exceeded, it must be notified to ARF.

FINANCIAL

	Members	Trustees (may delegate to a committee in accordance with terms of reference)	CEO (may delegate to a member of the Executive Team)	Local Academy Council (LAC)	Headteacher	Notes
17. Operating leases, which are compliant with ESFA requirements		Accountable over £75,000	Accountable up to £75,000			
18. Disposal of assets		Accountable over £5,000	Accountable up to £5,000			

In this Scheme, the phrases used above have the following meanings:

- **Accountable:** overall accountability and authority to approve (delegates work and is the last group or person to review the task or deliverable before it is deemed to be complete.
- **Responsible:** required to ensure effective execution – does the work to complete the task.
- **Consult:** provides input to the process based on how it will impact their work or where it is important to gather information based on their knowledge or expertise of the task or deliverable itself.
- **Inform:** kept in the loop on progress as likely to be impacted by the decision.
- **Comply:** follows agreed policies and procedure.
- **Deliver:** responsibility for undertaking the task delegated to them and reporting on its delivery at suitable intervals.
- **Recommend:** make recommendation as to how a particular task should be completed.
- **Report:** responsibility for reporting on the delivery of tasks.
- **Review:** responsibility for reviewing whether a task is being carried out satisfactorily and if not, determining what action is required.