

Inspire Partnership Scheme of Delegation

created June 2020 draft 1

This Scheme of Delegation:

- 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 Terms of Reference for Trustee Committees (including Board Committees and Local Committees);
- may only be altered or revoked by the Trustees.

The Trust's Scheme of Financial Delegation, which the Trust is required to have under the Academies Financial Handbook, is set out in a separate document and supplements this Scheme in respect of the delegation of financial powers and operation of robust internal controls.

The Scheme is divided into four sections as follows: **Strategy & Leadership; Education & Curriculum; Financial; HR & Operations**. 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 of their meaning are:

- **Accountable:** the individual/group that has primary responsibility for ensuring the particular task is completed/signed off and determining how the Trust and/or Schools (as appropriate) should undertake the task including defining appropriate milestones and targets to be reported against.
- **Responsible:** the individual/group that has responsibility for undertaking the particular task delegated to them and reporting on its delivery at suitable intervals. In the case of the CEO this will be at Trust level. In the case of the Headteacher this will be at school level.
- **Consult:** the individual/group that should be consulted for their views as part of the process of completing a particular task
- **Support:** the individual/group that offers input or challenge to a process, procedure or provision.
- **Inform:** the individual/group that needs to be informed.

Reference to the CEO in this document means 'the CEO and executive leadership team' unless specified as 'CEO only'. 'CEO only' responsibilities are usually those of the Accounting Officer, on which the CEO may seek support from colleagues.

| STRATEGY AND LEADERSHIP | | | | | |
|---|-------------|------------------------|-------------------------|---------------------------|------------------------------|
| | Trustees | CEO | Central Trust Exec Team | LGB/LAC | Headteacher |
| Set strategic objectives of the Trust & Schools | Accountable | Responsible | Responsible | Support (at School level) | Consult |
| Develop the character, mission & values of Trust & Schools | Accountable | Responsible | Support | Support | Responsible – for the School |
| Deliver strategic objectives of the Trust & Schools | Accountable | Responsible | Responsible | Support | Responsible – for the School |
| Scrutiny: Performance – review & challenge progress of the Trust against its strategic objectives and KPIs | Accountable | Responsible | Responsible | Support | Responsible – for the School |
| Scrutiny: Values - operation of the Trust & Schools against the agreed mission & values | Accountable | Responsible | Responsible | Support | Responsible – for the School |
| Compliance: Funding Agreement – comply with all obligations including the Academies Financial Handbook | Accountable | Responsible (CEO only) | Support | Support | Responsible – for the School |
| Compliance: Regulatory – with all regulations affecting the Trust (including all charity law, company law, employment law and health and safety) | Accountable | Responsible (CEO only) | Support | Support | Responsible – for the School |
| 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 | Accountable | Responsible (CEO only) | Support | Support | Responsible – for the School |
| Compliance –put in place a procedure to deal with any conflicts of interest and connected party transactions | Accountable | Responsible (CEO only) | Support | Support | |

| STRATEGY AND LEADERSHIP | | | | | |
|--|---|--|-------------------------|---|-------------|
| | Trustees | CEO | Central Trust Exec Team | LGB/LAC | Headteacher |
| Appointments of Trustees and Committee members – ensuring processes in place for appointment of trustees (including ensuring that the Trustees and Committee Members have the skills to run the Trust and the Schools) | Members: Accountable and Responsible (for Member-appointed Trustees) Trustees: Responsible (for co-opted Trustees) Support – Review own performance | Responsible Report - to the Board on the performance of the LGB/LAC Review - annually the size, structure and composition and skill of LGB/LAC Recommend – appropriate changes to the size and composition of the LGB/LAC | | Responsible - annual skills audit and review of performance | |
| Register of Interests (held in governance folder and website) | Responsible at Trust level | Responsible (senior employees) | Responsible | Responsible at School level | |
| Appointment of Clerk – Board and LGBs | Responsible - appoint the clerk to the Board | Support | | Responsible – appoint the clerk to the LGB/LAC | Support |

| STRATEGY AND LEADERSHIP | | | | | |
|---|-------------|-------------|--|--|--|
| | Trustees | CEO | Trust Central Exec Team | LGB/LAC | Headteacher |
| Policies – review and adoption of Trust Wide Policies (including admissions, DBS, charging and remissions policies, health & safety and safeguarding) | Accountable | Responsible | Responsible | Support – Trust policies are adopted and their implementation monitored Consult – on any changes to the admissions policy | Responsible – implementing all policies Consult – on any changes to the admissions policy |
| Prepare terms of reference for LGB/LACs and Committees | Accountable | Responsible | Support | | |
| Training programme for trustees and Committee Members | | Responsible | Support | Support | |
| EDUCATION AND CURRICULUM | | | | | |
| School Development Plan - for each School in line with strategic aims of the Trust | Accountable | Responsible | Support (Exec leaders to support Headteachers) | Support | Responsible – (for School) |
| Key Performance Indicators – setting performance KPIs of the Trust & the Schools | Accountable | Responsible | Responsible | | |
| Key Performance Indicators review, monitoring | Accountable | Responsible | Responsible | Responsible (for schools) | Responsible (for schools) |
| Key Performance Indicators – corrective action plans | Accountable | Responsible | Responsible | Support | Responsible (for schools) |

EDUCATION AND CURRICULUM

| | Trustees | CEO | Trust Central Exec Team | LGB/LAC | Headteacher |
|--|-------------|-------------|-------------------------|--|---|
| Quality of Teaching - ensuring appropriate levels of support, challenge and intervention to support delivery of education outcomes | Accountable | Responsible | Support | Support | Responsible – for the School |
| Curriculum – setting the curriculum for the Schools and reviewing its effectiveness | Accountable | Responsible | Support | Inform | Responsible – for the School Hub Headteacher – Support |
| SEN - ensuring that the legal requirements for children with special needs are met and that they are given support for learning. | Accountable | Responsible | Responsible | Support – how SEN needs are met at the School | Responsible – for the School |
| Pupil Premium – reviewing and challenging the value for money/ ROI of the Pupil Premium in terms of educational outcomes and narrowing the achievement gap | Accountable | Responsible | Responsible | Support – how Pupil Premium is spent at the School | Responsible – for the School |
| Set admissions policy and make admission decisions | Accountable | Responsible | Support | Consult – on any changes to the policy | Inform |
| Review – considering and evaluating performance of the Schools by: <ul style="list-style-type: none"> reviewing progress against agreed KPIs holding each school’s leadership to account for academic performance, quality of care and quality of provision monitoring the overall effectiveness and efficiency of leadership and management at the Schools receiving reports on the quality of teaching and learning and making recommendations to the Board. | Accountable | Responsible | Responsible | Support | Report to CEO and LGB/LAC |

| EDUCATION AND CURRICULUM | | | | | |
|---|---|-------------|-------------------------|--|---------------------------------------|
| | Trustees | CEO | Trust Central Exec Team | LGB/LAC | Headteacher |
| Self-evaluation – carrying out the self-evaluation process and the areas for improvement with particular regard to outcomes and success criteria. | Accountable | Consult | Responsible | Support | Responsible |
| Review priorities - considering the aims and priorities for raising standards of achievement in each of the Schools’ strategic plans. | Accountable | Responsible | Support | Support | Consult |
| Report – termly to Board on performance | Accountable | Responsible | Support | | |
| Student issues (including attendance, punctuality and non-exclusion disciplinary matters for each school) | | | | Support | Responsible – for the School |
| Exclusions - <ul style="list-style-type: none"> determining policy monitoring exclusion rates reporting exclusions to Trustees | Accountable Statutory Review Committee: Responsible – for consideration of reinstatement | Responsible | Responsible | | |
| Exclusions - decision making of fixed term exclusions at school level | | | | Support – join review panels, if asked | Responsible – for decision to exclude |
| School Hours, term dates and length of school day – setting the opening and closing times for the Schools | Accountable | Responsible | | Inform | |
| School lunch – ensure provided to appropriate nutritional standards | | | Support | Support | Responsible – for the School |
| Provision of free school meals to those meeting criteria | | | | Support | Responsible – for the School |

| EDUCATION AND CURRICULUM | | | | | |
|--|-------------|-------------|-------------------------|---------|------------------------------|
| | Trustees | CEO | Trust Central Exec Team | LGB/LAC | Headteacher |
| Stakeholder Engagement – | Accountable | Responsible | Support | Support | Responsible – for the School |
| <ul style="list-style-type: none"> Promoting partnership working between parents/carers and the Schools to promote high standards of attendance, behaviour and learning by students. Undertaking consultation with students, parents/carers and other stakeholders as part of a programme of regular self-evaluation by the Schools to assess its performance against its stated aims and objectives. Ensuring that such feedback is used to support the development of best practice and to promote the quality of the overall student experience. | | Accountable | Support | Support | Responsible |
| Ofsted Inspections Trust Support – <ul style="list-style-type: none"> Board will liaise with Ofsted where Trust is inspected or it will assist with a School inspection. CEO will ensure Trust is prepared for inspection and manage the process from a Trust perspective where the impact of the Trust is under review | Responsible | Support | Responsible | Support | Support |
| Ofsted Inspections: Schools <ul style="list-style-type: none"> CEO will support LGB/LACs and Headteachers for individual School inspections | Accountable | Support | Support | Support | Responsible |

| SAFEGUARDING | | | | | |
|---|-------------|-------------|----------------------------|-------------|------------------------------|
| | Trustees | CEO | Trust Central Exec Team | LGB/LAC | Headteacher |
| Safeguarding – including ensuring each School has appointed a Designated Safeguarding Lead, ensuring compliance with statutory guidance and maintenance of single central record | Accountable | Responsible | | Support | Responsible – for the School |
| Appoint a named safeguarding link trustee | Accountable | | | | |
| Ensure IPAT has centrally appointed and appropriately trained designated safeguarding lead (DSL) and deputy DSL | | Accountable | Responsible | | |
| Ensure a IPAT safeguarding policy is in place in line with statutory guidance | Accountable | | | | |
| Ensure academy safeguarding compliance - including adherence to locally owned academy safeguarding policy and other related policies such as: behaviour, lock down procedures etc | | | Accountable | | Responsible |
| Ensure academy safeguarding audits are completed annually | | | Accountable | | Responsible |
| Completion of all statutory safer recruitment checks, including the completion and maintenance of academy owned IPAT single central register | | | Accountable | | Responsible |
| Completion of all statutory safer recruitment checks, including the completion and maintenance of central team IPAT single central register | | | Accountable | | Responsible |
| Ensure IPAT central team safeguarding compliance | | | Responsible | | |
| Ensure each academy has appropriately trained designated safeguarding lead (DSL) and deputy DSL | | | | Accountable | Responsible |

| SAFEGUARDING | | | | | |
|--|---|-------------|-------------------------|-------------|-------------|
| | Trustees | CEO | Trust Central Exec Team | LGB/LAC | Headteacher |
| Ensure academy staff receive all statutory safeguarding training and ensure that child protection records are well organised and held/ shared securely | | | | Accountable | Responsible |
| Ensure allegations made against IPAT central staff are dealt with in accordance with IPAT procedure for dealing with allegations against a member of staff | | Accountable | | | |
| Ensure allegations made against academy staff and volunteers are dealt with in accordance with IPAT Procedure for dealing with allegations against a member of staff | | Accountable | Support | | Responsible |
| FINANCIAL | | | | | |
| Appointment of the Audit & Risk Committee | Responsible and Accountable | | Support | | |
| Appointment of the Accounting Officer | Responsible and Accountable | | | | |
| Appointment of External Auditors | Members: Responsible and Accountable | | Support | | |
| Appointment of the Internal Auditors | Responsible and Accountable | | Support | | |
| Approve Annual Accounts | Accountable | Responsible | | | |

| FINANCIAL | | | | | |
|---|-------------|-------------|-------------------------|---------------------------|------------------------------|
| | Trustees | CEO | Trust Central Exec Team | LGB/LAC | Headteacher |
| Scheme of Financial Delegation & Financial Policies – establishing of policies and procedures to ensure compliance with the Trust’s financial and reporting requirements | Accountable | Responsible | Support | | |
| Bank Accounts – authorising the establishment of bank accounts and approve bank mandates in the name of the Trust | Accountable | Responsible | Support | | |
| Funding Model - agreeing a funding model across the Trust and Responsible an individual funding model for the Schools) so as to the secure the Trust’s financial health in the short term and the long term | Accountable | Responsible | Responsible | | |
| Trust Annual Budget – formulating and setting for the Trust | Accountable | Responsible | Support | | |
| School Annual Budgets – formulating and determining the proportion of the overall budget to be delegated to each School (including uses of contingency funds/ balances) | Accountable | Responsible | Responsible | Inform – give July update | Consult |
| Expenditure monitoring and ensuring delivery of Annual Budgets | Accountable | Responsible | Responsible | Inform – give July update | Responsible – for the School |
| Financial reporting and KPI monitoring including: <ul style="list-style-type: none"> • KPI setting • KPI monitoring KPI adjustment / corrective action | Accountable | Responsible | Responsible | Inform | Responsible – for the School |
| Investments – agreeing the investment policy in line with the Academies Financial Handbook and the Scheme of Financial Delegation | Accountable | Responsible | Support | | |

| HR AND OPERATIONAL | | | | | |
|--|--|--------------------------------|-------------------------|---------|--|
| | Trustees | CEO | Trust Central Exec Team | LGB/LAC | Headteacher |
| Appointing and Dismissing the CEO, COO and Director of Education | Responsible and Accountable | | | Inform | |
| Appointing the Headteachers at each School | Inform and Support: representative to sit on the appointment panel, if asked | Responsible | | Inform | |
| Appointing of Cross-Trust Staff (in line with recruitment policy) | Inform | Responsible | | Inform | |
| Appointing School SLT (excluding Headteacher) | | Consult | Support | Inform | Responsible Hub Headteacher - Support |
| Appointing School Staff (excluding SLT & Headteacher) | | Inform and Support | | Inform | Responsible |
| Establishing Trust wide HR Policies (including recruitment, discipline, capability, grievance and absence policies) in accordance with all appropriate regulations | Accountable | Responsible – for establishing | Responsible | Inform | Responsible – for implementing |
| Setting Appraisal Performance Management Policy together with pay reviews (in line with the Trust’s pay policy and all statutory regulations) | Accountable | Responsible | Support | | Responsible – for implementing |
| Setting Terms and Conditions of Employment and Staff Handbook | Accountable | Responsible | Responsible | Inform | Responsible – for implementing |
| Dismissing Headteachers, Cross Trust staff (in accordance with the Trust disciplinary and capability policies) | | Responsible | Support | Inform | |
| Dismissing all other school staff (in accordance with the Trust disciplinary and capability policies) | | Inform | | Inform | Responsible |

| HR AND OPERATIONAL | | | | | |
|---|-------------|-------------|-------------------------|---------|--|
| | Trustees | CEO | Trust Central Exec Team | LGB/LAC | Headteacher |
| Reviewing discipline and grievance policy | Accountable | Responsible | | | |
| Setting trust wide procurement policies (for suppliers including auditors, HR and payroll providers and solicitors) in accordance with the Funding Agreement, Academies Financial Handbook and the Trust's procurement policy | Accountable | Responsible | Responsible | Inform | Inform |
| Enter into contracts – up to limit of delegation set out in Scheme of Financial Delegation | | Responsible | Responsible | Inform | Responsible – for the School |
| Determining and allocating central services provided to the Schools by the Trust | | Responsible | Support | | Consult |
| Overseeing the effectiveness of services provided centrally by the Trust | Accountable | Responsible | Responsible | Inform | Consult |
| Asset and Premises Maintenance Strategy – determining use of Schools' premises and ensuring premises are adequately maintained | Accountable | Responsible | | Inform | Responsible – in accordance with School policy |
| Approve allocation of Trust capital funds in accordance with scheme of financial delegation | Accountable | Responsible | | | |
| Develop a 5-year strategy plan for capital expenditure across the Trust | | Accountable | Responsible | | |
| Develop school level priorities for capital expenditure as part of annual budget and 3-year plan setting | | | | Support | Accountable |
| Ensure compliance with statutory regulations relating to premises | | Accountable | Responsible | Support | Responsible – at school level |
| Acquiring and disposing of Trust land | Accountable | Responsible | Support | | |

| HR AND OPERATIONAL | | | | | |
|--|-------------|---------------------------|-------------------------|-------------|--|
| | Trustees | CEO | Trust Central Exec Team | LGB/LAC | Headteacher |
| Changing use of Assets | Accountable | Responsible | Support | | |
| Arranging insurance for the Trust | Accountable | Responsible | Responsible | | Responsible for school based outside RPA |
| Media and PR - overseeing public relations activities to project the activities of the Trust and the Schools to the wider community | Accountable | Responsible | Support | Inform | Consult/support |
| Information management – including adopting and following policies for information security and compliance with FoI and GDPR legislation and maintaining accurate records (staff, student) | Accountable | Responsible | | Inform | Inform/Support |
| School Prospectus and website | | Accountable | | Inform | Responsible – for the School |
| Trust Prospectus and website | | Accountable & Responsible | Responsible | Inform | |
| RISK MANAGEMENT | | | | | |
| Overall responsibility for risk management | Accountable | Responsible | Support | Support | Responsible – for the School |
| Approve the Trust Risk Management policy including setting risk tolerances. | Accountable | Responsible | | | |
| Identify and manage the strategic risks facing the Trust | | Accountable | Responsible | | |
| Maintain and regularly review the Trust Risk Register | Accountable | Responsible | Responsible | | |
| Monitor school level compliance with risk management policy | | Accountable | Responsible | Responsible | |
| Responsibility for school level risk management including regular review and updating of school level risk register | | | | Accountable | Responsible |

| HEALTH AND SAFETY | | | | | |
|--|-------------|-------------|-------------------------|---------|-------------|
| | Trustees | CEO | Trust Central Exec Team | LGB/LAC | Headteacher |
| Responsible as employer under H&S at Work Act 1974 | Accountable | Support | Support | Support | Support |
| Trust H&S policy | Accountable | Responsible | Support | Inform | Support |
| Ensure expertise exists within the Trust to carry out H&S responsibilities | Accountable | Responsible | | | |
| Appoint Trustee responsible for H&S across the Trust | Accountable | | | | |
| Appoint LGB member responsible for H&S monitoring at school level | | Support | | Support | Responsible |
| Health and Safety compliance at School level | Accountable | Support | Support | Support | Responsible |