



Hope Learning Trust, York (“the MAT”)

Scheme of Delegation

For

All Academies within the Trust

Approved by Trustees on 17th July 2019

Applies from: 01 September 2019

Date of next scheduled review: July 2020

Publication/communication requirements: The Board of Trustees should ensure that a copy is provided to Members, Board Committees (including the Local Governing Committee), the Chief Executive Officer and the Principals/Headteachers. The Document should also be published on the Trust and Academy websites.

HOPE LEARNING TRUST YORK – SCHEME OF DELEGATION MATRIX FOR ALL ACADEMIES

INTRODUCTION

1. Purpose of the Scheme of Delegation

- 1.1 The primary purpose of this Scheme of Delegation (Scheme) is to inform those involved with the governance of the Academy of where decision making, advisory and other responsibilities lie within the MAT.
- 1.2 Where information is displayed in red, this refers to Church of England Academies and Church of England/Methodist Academies (“Church Schools”) only, and reflects their former Voluntary Aided or Voluntary Controlled Status.
- 1.3 The Scheme does not contain details of every decision/responsibility or every aspect that will be delegated. Its content will be supplemented by the Trust’s strategic plans, policies and procedures and any direction given or rules and directions agreed or issued by the Members or the Board of Trustees. In the event that there is uncertainty as to which tier of governance has responsibility for a particular matter, guidance should be sought from the Chair of the Trust.
- 1.4 Whilst the Scheme is an important document, the way it is operated in practice will be the key to its efficacy. Good communication between the Board and its Committees and relevant members of staff will be essential. It is hoped that the establishment of a Chairs Group and a Principals Group will aid communication in this respect and aid with effective governance more generally.
- 1.5 The Scheme should not be confused with the written scheme of delegation of financial powers referred to in the Academies Financial Handbook, which is a separate document.

2. Adoption of the Scheme

- 2.1 This Scheme has been approved by the Board of Trustees and shall apply to the Academy from the date shown on the front cover.

3. How it has been determined

- 3.1 In determining this Scheme, the Trustees have been mindful that:
 - a. The Board of Trustees is ultimately accountable for the way in which the academies managed by the MAT are run and as such must be satisfied that delegation takes place only where appropriate and that it receives appropriate reports on matters delegated by it/actions taken in its name to enable appropriate oversight.
 - b. There are some areas where it makes sense for matters to be dealt with centrally, rather than by individual academies. It is hoped that this will reduce the burden on the individual academies, which already have a heavy workload, and in appropriate cases achieve economies of scale.
 - c. The Board cannot take all decisions itself, and in making decisions that the Board reserves for itself, it will often be reliant on information and advice from and be guided (as appropriate) by its Committees, the academy LGCs and others operating at academy level. The Board considers that there is often a powerful case for local involvement in decision making.

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4. Termination and amendment

- 4.1 The Scheme will be subject to formal review annually. However, where the Board deems it appropriate, changes will be made in year.
- 4.2 The Board has the absolute discretion to review, amend and/or terminate the Scheme at any time and as it sees fit (subject to complying with the legal requirements upon it).
- 4.3 As the MAT and the academies develop, so may the governance arrangements and accordingly the delegations that are in place. For example (and without limitation):
- Changes may need to be made as a result of lessons learned and development of best practice;
 - It is hoped that the strength of weaker academies will increase over time such that additional responsibilities may be delegated;
 - Where weaknesses develop in an academy's leadership and governance, or in particular areas, the MAT may need to intervene and remove delegations.
- 4.4 The Board would welcome comments on the operation of the Scheme where it is felt that revisions should be made. Where practicable, the Board will give the LGC an opportunity to comment before determining the Scheme of Delegation.

5. Delegation Matrix

- 5.1 The delegation matrix that applies in respect of the Academy is set out below. It is structured in accordance with the following index:

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Delegation Matrix - Hope Learning Trust - All Schools

	DECISION	MEMBERS	BOARD OF TRUSTEES	CHIEF EXECUTIVE	LGC	ACADEMY PRINCIPAL	THIRD PARTY	ADVICE	COMMENTS	
A. Overarching Governance										
A1 Member matters										
1.	Amendment of Articles of Association	Decide	<Advise	<Advise				See advice/ comments	<ul style="list-style-type: none"> Company Secretary / Clerk advice and support with process Legal advice (as required) 	<ul style="list-style-type: none"> Consent of York Diocesan Board of Education (YDBE) and any site trustees required. DfE and/or Charity Commission consent required in certain cases Must be filed at Companies House along with copy of special resolution and any required forms
2.	Call Members' Meetings	Decide	Decide						<ul style="list-style-type: none"> Company Secretary / Clerk advice and support with process 	<ul style="list-style-type: none"> As a minimum, Members should hold an AGM once a year. Extraordinary meetings may also be called by Trustees or Members. Decisions may be made by written resolution between meetings in line with the process set out in the Articles of Association.
3.	Appoint/remove Members	Decide						See advice/ comments	<ul style="list-style-type: none"> Company Secretary / Clerk advice and support with process 	<ul style="list-style-type: none"> New members can only be appointed by existing members. YDBE guidance and training should be provided to those undertaking the role of Member and Members will be required to sign an appropriate ethos undertaking. Company Secretary / Clerk to liaise with Trust personnel to ensure <ul style="list-style-type: none"> - appropriate DBS and related checks made - GIAS notifications are made - Details of Member and their interests are uploaded on Trust website - Copies of completed ethos undertakings to be provided to all Members.
4.	Complete Member register of interests, and keep under regular review	Responsible	Receive	Receive	Receive	Receive		See advice/ comments	<ul style="list-style-type: none"> Company Secretary / Clerk advice and support with process 	<ul style="list-style-type: none"> Company Secretary / Clerk to liaise with Trust personnel to ensure details are uploaded on Trust website. Register of Member Interests should be brought to the attention of decision makers as appropriate (Chief Executive to oversee).

Delegation Matrix - Hope Learning Trust - All Schools

	DECISION	MEMBERS	BOARD OF TRUSTEES	CHIEF EXECUTIVE	LGC	ACADEMY PRINCIPAL	THIRD PARTY	ADVICE	COMMENTS
A2 Board matters									
5.	Appoint/remove Trustees	Decide	<Advise					See advice/ comments <ul style="list-style-type: none"> • Clerk advice and support with process • Trustees to advise on skills gaps to inform decision making 	<ul style="list-style-type: none"> • The Members shall appoint a minimum of 6 Trustees, following recommendation from the Board of Trustees • Recommendation/application forms should request information about ability and commitment to preserve and develop CE and CE/Methodist ethos of CE and CE/Methodist schools within the Trust as well as other skills, and Trustees should be required to sign an appropriate ethos undertaking. • YDBE guidance and training should be provided to those undertaking the role. • Code of Conduct should be agreed and all Trustees should be required to sign it • The clerk to liaise with appropriate Trust personnel to ensure that <ul style="list-style-type: none"> • appropriate DBS and related checks are made • GIAS notifications are made • Details of Trustees and their interests are uploaded on Trust website • YDBE is informed of any changes to the Trustees • Copies of completed ethos undertakings to be provided to YDBE and Foundation Members. • Return must be filed at Companies House by the Company Secretary. • Chair of Board, Chief Executive and Company Secretary / Clerk and others as appropriate to provide induction.
6.	Complete Trust Board skills audit and training plan annually	Receive	Responsible	<Advise				<ul style="list-style-type: none"> • Chair of Board to lead – Clerk advice and support with process 	<ul style="list-style-type: none"> • Skills audit should include ability and commitment to preserve and develop CE and CE/Methodist ethos of Church Schools within the Trust. • Chair of Board to follow up with Trustees on training requirements • Details of skills gaps should be provided to those responsible for appointing Trustees when a vacancy arises
7.	Appoint/Remove Chair of Trustees	Receive	Decide					<ul style="list-style-type: none"> • Clerk advice and support with process 	<ul style="list-style-type: none"> • Should not be an employee
8.	Appointment Vice Chair of Trustees		Decide					<ul style="list-style-type: none"> • Clerk advice and support with process 	<ul style="list-style-type: none"> • Should not be an employee

Delegation Matrix - Hope Learning Trust - All Schools

	DECISION	MEMBERS	BOARD OF TRUSTEES	CHIEF EXECUTIVE	LGC	ACADEMY PRINCIPAL	THIRD PARTY	ADVICE	COMMENTS
9.	Determine and allocate specific Trustee roles (as required)		Decide					<ul style="list-style-type: none"> Chair to advise based on skills audit 	<ul style="list-style-type: none"> There will be appointed Trustees with specific responsibilities for Safeguarding/Child Protection, Health and Safety, Special Educational Needs. Allocated Trustees should work with the Local Governors given specific responsibilities in their areas (the roles should dovetail) NB All Trustees continue to have responsibility for these areas, despite any allocation of specific roles
10.	Confirm Accounting Officer		Decide					<ul style="list-style-type: none"> Finance Director to support and notify Secretary of State 	<ul style="list-style-type: none"> The Accounting Officer to be the Chief Executive (the role will be heavily supported by the Finance Director and the Principals). Has responsibility for regularity, propriety and value for money. Also responsibility for ensuring that proper financial records and accounts are kept.
11.	Appoint/remove Company Secretary		Decide	<Advise				<ul style="list-style-type: none"> HR advice obtained as required 	<ul style="list-style-type: none"> Should have relevant experience in school/company/charity governance. The relevant appointee will also act as Governance Officer – see section C below Reports directly to the Board
12.	Determine Scheme of Delegation		Decide	<Advise	Advise	<Advise	See advice/ comments	<ul style="list-style-type: none"> Company Secretary / Clerk and Chief Executive advice and support LGCs and other Committees to provide advice on amendment based on experience of operation 	<ul style="list-style-type: none"> The document will be reviewed every year or more frequently where the Trustees deem this to be desirable. Where practicable, the Board will give the LGC and Committees an opportunity to comment before determining the Scheme of Delegation. The Scheme will comply with the Memorandum and Articles of Association and other legal requirements, including any matters that are reserved to Members from time to time. The Board will ensure that the CE or CE/Methodist foundation and responsibilities to the YDBE and site trustees are properly reflected in any Scheme for the Academy. The YDBE will be consulted prior to first adoption and thereafter in the event that any proposed changes could impact on the CE or CE/Methodist foundation of the Academy.
13.	Complete Trustee register of interests and keep under regular review	Receive	Responsible	Receive	Receive	Receive	See advice/ comments	<ul style="list-style-type: none"> Clerk advice and support with process 	<ul style="list-style-type: none"> Clerk to liaise with Trust personnel to ensure details are uploaded on Trust website. Register of Trustee Interests should be brought to the attention of decision makers as appropriate (Chief Executive to oversee).

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	DECISION	MEMBERS	BOARD OF TRUSTEES	CHIEF EXECUTIVE	LGC	ACADEMY PRINCIPAL	THIRD PARTY	ADVICE	COMMENTS
14.	Board of Trustees' Annual Schedule of Business		Decide	<Advise	Receive			<ul style="list-style-type: none"> Chair of Board to lead, with Clerk advice and support with process Appropriate advice and input from Chief Executive and those responsible for planning LGC/other Committee Annual Schedule of Business 	<ul style="list-style-type: none"> Should be shared with LGC and other Committees to inform their work Chair of Board and Clerk to use to inform agenda setting Trustees should meet at least every five times a year
15.	Determine policy review process and schedule		Decide	<Advise	Receive			<ul style="list-style-type: none"> Clerk advice and support with process Appropriate advice and input from Chief Executive (and other key employees) and those responsible for LGC/other Committee policy review 	<ul style="list-style-type: none"> Needs to dovetail with annual schedule of business (see above). Should specify what policies there are to be, the lead member of staff responsible for the policy, the approving person/body and when the review will take place. Review of policies to be conducted in accordance with process and schedule. Where relevant that policies reflect the Anglican/Methodist foundation of the school
16.	Annual Review of Governance and Board Effectiveness		Responsible	<Advise	Advise	<Advise		<ul style="list-style-type: none"> Chair of Board to lead. Clerk and Chief Executive advice and support with process 	<ul style="list-style-type: none"> This should dovetail with the Committees' (including LGC's) reviews of their own effectiveness (see below). The outcome of the review may impact on the level of delegation to LGCs and others under the Scheme of Delegation or otherwise. Trustees to consider whether an external review of governance should take place.
17.	Annual Report and Financial Statements	Receive and scrutinise	Approve	<Advise, Approve			See advice/ comments	<ul style="list-style-type: none"> Finance Director to co-ordinate draft, with input from Chief Executive and Clerk Auditors to review and sign off Trustees and Accountable Officer must approve relevant sections 	<ul style="list-style-type: none"> The Members should receive and scrutinise the accounts at their AGM. The document should be filed with Companies House and the DfE and uploaded onto the Trust's website.

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	DECISION	MEMBERS	BOARD OF TRUSTEES	CHIEF EXECUTIVE	LGC	ACADEMY PRINCIPAL	THIRD PARTY	ADVICE	COMMENTS
18.	Other company returns		Approve	<Advise, Approve				<ul style="list-style-type: none"> Trustees to approve as required Trust staff to advise as appropriate e.g. HR Director, Finance Director, Clerk 	<ul style="list-style-type: none"> To include key Companies House filings and DfE returns
19.	Chief Executive Reports to Trustees		Receive, Scrutinise	Responsible				<ul style="list-style-type: none"> The Chief Executive will be supported by others as appropriate e.g. Company Secretary / Clerk, Finance Director, HR Director, Church School Scrutiny Committee 	<ul style="list-style-type: none"> The Trustees should agree with the Chief Executive what reports are required, the required frequency and the content of those reports. The Trustees should receive the reports at a Board meeting to enable appropriate questioning and follow up.
20.	Supplemental Reports to Members	Receive, Scrutinise	Approve	<Advise				<ul style="list-style-type: none"> The Chief Executive should co-ordinate the reports for input and approval by the Trustees. The Chief Executive and the Trustees will be supported by others as appropriate e.g. Company Secretary / Clerk, Finance Director, HR Director, Church School Scrutiny Committee 	<ul style="list-style-type: none"> The Members should agree with the Trustees what additional reports are required, the required frequency and the content of those reports. The Members should receive the supplemental reports at their AGM and/or at Extraordinary General Meetings to enable appropriate questioning and follow up The reports should include an annual Church School Distinctiveness Report.
21.	Setting up any subsidiary company or linked charity	Decide	Recommend					<ul style="list-style-type: none"> Legal and financial advice required 	<ul style="list-style-type: none"> Trustees must keep the need for a subsidiary company under review, based on the Trust's trading and related activities.

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	DECISION	MEMBERS	BOARD OF TRUSTEES	CHIEF EXECUTIVE	LGC	ACADEMY PRINCIPAL	THIRD PARTY	ADVICE	COMMENTS
A3 LGC and other committee matters									
22.	Determine and keep under review Committee complement		Decide	<Advise	Advise	<Advise		<ul style="list-style-type: none"> • Chief Executive and Clerk to advise and support • Principal and Clerk to aid formulation of LGC advice 	<ul style="list-style-type: none"> • Consideration will need to be given as to: <ul style="list-style-type: none"> - what Committees are required (under the Articles of Association/Funding Agreements/Academies Financial Handbook e.g. Audit/Finance, LGC) - What additional Committees (board and/or LGC and/or shared) would be useful given the size of the MAT and the decision making functions that take place at each level of governance. - Membership, terms of reference, reporting requirements, decision making and other procedures etc. of each Committee (please see below) • Under the Articles of Association: <ul style="list-style-type: none"> - The constitution, membership and proceedings of any committee must be determined by the /Trustees. - The establishment, terms of reference, constitution and membership of any committee shall be reviewed at least once in every twelve months. - The membership of any committee of the Trustees may include persons who are not Trustees, provided that (with the exception of the LGCs) a majority of members of any such committee shall be Trustees. - Except in the case of a LGC, no vote on any matter shall be taken at a meeting of a committee of the Trustees unless the majority of members of the committee present are Trustees. • Academy trusts are required to establish a Trustee committee to provide assurance over the suitability of, and compliance with, its financial systems and operational controls. All Trusts with an annual income over £50 million must have a dedicated audit committee. The majority of members must be Trustees. • Consideration should be given as to setting up a Church School Development Group, being an advisory only group that will help to support the CE or CE/Methodist foundation of Church Schools and report to the Board on their operation as Church Schools.

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	DECISION	MEMBERS	BOARD OF TRUSTEES	CHIEF EXECUTIVE	LGC	ACADEMY PRINCIPAL	THIRD PARTY	ADVICE	COMMENTS
23.	Determining LGC composition		Decide	<Advise	<Advise	<Advise	See advice/ comments	<ul style="list-style-type: none"> • Clerk advice and support with process 	<ul style="list-style-type: none"> • LGC will be agreed with the YDBE. Any changes to the number or proportion of Foundation Local Governors, or how they will be appointed, will require the consent of the YDBE and other faith bodies as appropriate. • The composition will be set out in the Governance Handbook
24.	Appointing LGC governors		Decide		Advise		See advice/ comments	<ul style="list-style-type: none"> • Clerk advice and support with process • Details of skills gaps should be provided to those responsible for appointing Local Governors when a vacancy arises 	<ul style="list-style-type: none"> • The YDBE's Foundation Local Governor appointment processes should be followed when Foundation Local Governors are being appointed • The Trust's Ethos Statement and Code of Conduct should be agreed and all Local Governors should be required to sign it • All Local Governors should attend appropriate CE governance training and complete an appropriately worded ethos undertaking. Clerk to liaise with appropriate staff to ensure: <ul style="list-style-type: none"> • appropriate DBS and related checks are made • GIAS notifications are made • Details of Local Governors and their interests are uploaded on Academy website • Copies of ethos undertakings are sent to the YDBE and the Trustees. • Clerk, Principal and Chair of LGC (and others as appropriate) to lead induction.
25.	Hold staff and parent elections for LGC					Responsible		<ul style="list-style-type: none"> • Clerk and Principal advice and support with process 	<ul style="list-style-type: none"> • Must be in accordance with any relevant provisions in the Articles of Association and Scheme of Delegation • LGC Members to flag need for skills and ability to support the CE and CE/Methodist ethos of Academy as part of process. • LGC to appoint in the event no-one puts themselves forward for election.
26.	Appoint Chair of LGC		Approve		Recommend			<ul style="list-style-type: none"> • Clerk advice and support with process 	<ul style="list-style-type: none"> • Should not be an employee. • The CEO and a Trustee will meet with all proposed new LGC Chairs prior to approval of their appointment for an informal discussion around the role, their commitment and the values of the Trust
27.	Appoint Vice Chair of LGC				Decide			<ul style="list-style-type: none"> • Clerk advice and support with process 	<ul style="list-style-type: none"> • Should not be an employee

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	DECISION	MEMBERS	BOARD OF TRUSTEES	CHIEF EXECUTIVE	LGC	ACADEMY PRINCIPAL	THIRD PARTY	ADVICE	COMMENTS
28.	Allocate specific local governor roles				Decide	<Advise		<ul style="list-style-type: none"> Chair of LGC to lead, based on skills Trustees to specify certain required roles to dovetail with own link Trustees (if applicable) 	<ul style="list-style-type: none"> Allocated LGC members should work with Trustees allocated with specific responsibilities in their areas LGC may choose to allocate additional link roles [e.g. <i>Safeguarding/Child Protection, Health and Safety, Special Educational Needs</i>] All LGC members continue to have responsibility for these areas, despite any allocation of specific roles
29.	Confirm local Accounting Officer (Academy level)		Decide	<Advise				<ul style="list-style-type: none"> Reports to Chief Executive as overall Accounting Officer 	<ul style="list-style-type: none"> Will generally be the Principal or equivalent (the role will be heavily supported by the Academy's Finance manager or equivalent) Has responsibility for regularity, propriety and value for money at Academy level. Also responsibility for ensuring that proper financial records and accounts are kept.
30.	Complete LGC register of interests and keep under regular review		Receive	Receive	Responsible	Receive	See advice/ comments	<ul style="list-style-type: none"> Clerk advice and support with process Clerk to liaise with appropriate Academy personnel to ensure uploaded on website 	<ul style="list-style-type: none"> Register of LGC Interests should be brought to the attention of decision makers as appropriate (Principal to oversee).
31.	Determine LGC annual schedule of business		Advise	<Advise>	Responsible	<Advise		<ul style="list-style-type: none"> Chair to lead with Clerk advice and support with process Appropriate advice and input from Chief Executive, Principals and those responsible for planning other Annual Schedules of Business 	<ul style="list-style-type: none"> This needs to dovetail with the Board of Trustees' Schedule of business To include items as appropriate to reflect that the Academy is a CE and CE/Methodist school. Chair and Clerk to use to inform agenda setting LGC should meet at least five times per year

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	DECISION	MEMBERS	BOARD OF TRUSTEES	CHIEF EXECUTIVE	LGC	ACADEMY PRINCIPAL	THIRD PARTY	ADVICE	COMMENTS
32.	Academy level Reporting to Trustees		Receive, Scrutinise	<Advise	Responsible				<ul style="list-style-type: none"> LGC minutes will be provided to Trustees as standard. The co-ordinated schedule of business should mean that this enables LGC advice to get to the Board in a timely manner to inform their decision making. The content and frequency of any additional LGC reports shall be specified by the Trustees. Additional Academy level reporting should be included in Chief Executive reports as appropriate (see above). The Trustees should receive the minutes and any additional reports at Board Meetings to enable appropriate discussion and scrutiny.
33.	Review of LGC effectiveness		Receive, Scrutinise	<Advise	Responsible	<Advise		<ul style="list-style-type: none"> Chair of LGC to lead, Clerk advice and support with process 	<ul style="list-style-type: none"> This should dovetail with the Board's reviews of their own effectiveness (Trustees may set a template). Conclusions should be fed into the Board's review of governance effectiveness and may impact on future levels of delegation pursuant to the Scheme of Delegation. LGC to participate as required in any external review of governance required by the Trustees.
34.	LGC skills audit		Receive, Scrutinise	<Advise	Responsible	<Advise		<ul style="list-style-type: none"> Clerk advice and support with process 	<ul style="list-style-type: none"> Trustees may set a template. Skills audit should include ability and commitment to preserve and develop CE and CE/Methodist ethos of the Academy Trustees to receive details and may impact on areas of delegation Details of skills gaps should be provided to those responsible for appointing local governors when a vacancy arises
35.	Appoint/remove clerk to the LGC		Decide	<Advise				<ul style="list-style-type: none"> HR advice obtained as required 	<ul style="list-style-type: none"> Should have relevant experience in school and academy governance
36.	Determine LGC procedures		Decide		Advise			<ul style="list-style-type: none"> Clerk to board to advise and support Clerk to support LGB in formulating advice 	<ul style="list-style-type: none"> These must be in compliance with the Articles of Association and must include details relating to appointment of Chair/Vice Chair, quorum and decision making and other procedures etc

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	DECISION	MEMBERS	BOARD OF TRUSTEES	CHIEF EXECUTIVE	LGC	ACADEMY PRINCIPAL	THIRD PARTY	ADVICE	COMMENTS
37.	Determine Trust Committee Structure (including LGCs and Trust Board Sub-Committees)		Decide	Advise					<ul style="list-style-type: none"> The Board of Trustees will have a sub-committee for both Resources and Standards. Trustees to agree numbers, frequency of meetings and terms of reference.
38.	Establish Church School Scrutiny Committee for the Trust, set membership, terms of reference, reporting requirements, procedures etc		Decide	<Advise			See advice/ comments	<ul style="list-style-type: none"> The YDBE will provide advice and guidance 	<ul style="list-style-type: none"> The group should be an advisory only body, which will provide support to, and appropriately scrutinise, Church of England schools in the Trust in relation to their CE or CE/Methodist foundation and distinctiveness. The group will report to Trustees, the CE and CE/Methodist school LGCs and others as appropriate. Its members should include Trustees, as well as Foundation LGC members and Principals drawn from the Church Schools.

Delegation Matrix - Hope Learning Trust - All Schools

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A4 Heads and Chairs Group									
39.	Establish Heads Group			Responsible		Participate		<ul style="list-style-type: none"> Supported by Central Team as required 	<ul style="list-style-type: none"> Chief Executive to establish and lead Heads Group to enable all Principals to feed in their thoughts and advice in relation to pertinent matters for their Academy and to enable co-ordinated reporting (through the Chief Executive) to the Board.
40.	Establish Chairs Group		Participate CHAIR	Responsible	Participate CHAIR			<ul style="list-style-type: none"> Supported by Central Team as required 	<ul style="list-style-type: none"> Chair of Trustees to establish and lead Chairs Group to enable all LGC Chairs to feed in their thoughts and advice in relation to pertinent matters for their Academy and to ensure dovetailing of Trustee and LGC business.
A5 Miscellaneous									
41.	Determine governance policies and procedures for Trustees and Local Governors		Approve					<ul style="list-style-type: none"> Finance Director and Clerk to advise and support 	<ul style="list-style-type: none"> E.g. appointment, Induction, expenses, Interests (conflicts, payments, contacts etc), Code of Conduct Policies must be in accordance with Articles of Association
42.	Obtain Trustee and Officers insurance		Approve					<ul style="list-style-type: none"> Finance Director and Company Secretary advice and support 	<ul style="list-style-type: none"> Must be in accordance with Articles of Association
A6 Website reporting									
43.	Governance details on trust website	Receive	Approve	<Advise	<Advise CLERK	<Advise		<ul style="list-style-type: none"> Executive PA & Chief Executive to advise and support 	<ul style="list-style-type: none"> Trust to approve framework Executive PA responsible for ensuring information up to date

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	DECISION	MEMBERS	BOARD OF TRUSTEES	CHIEF EXECUTIVE	LGC	ACADEMY PRINCIPAL	THIRD PARTY	ADVICE	COMMENTS
B. Strategy and Leadership									
B1 Strategic planning and oversight									
1.	Set Trust vision and ethos statement		Decide	<Advise				<ul style="list-style-type: none"> Chief Executive leading role in formulating for Trustee scrutiny 	<ul style="list-style-type: none"> Chief Executive responsible for implementation Should reflect Community and Church foundation of academies in Trust
2.	Set strategic objectives and KPIs of Trust and determine Trust Development Plan and review process		Decide	<Advise				<ul style="list-style-type: none"> Chief Executive leading role in formulating for Trustee scrutiny 	<ul style="list-style-type: none"> Chief Executive responsible for ensuring objectives are met and for progress against Development Plan Development Plan must be in line with strategic objectives Should reflect Community and Church foundation of academies in Trust
3.	Complete Trust Self Evaluation Form (or equivalent)		Decide	<Advise				<ul style="list-style-type: none"> Chief Executive leading role in formulating for Trustee scrutiny 	<ul style="list-style-type: none"> SEF to reflect progress against Development Plan
4.	Set Academy vision and ethos statement		Receive	Approve	Decide	<Advise		<ul style="list-style-type: none"> Principal leading role in formulating for LGC scrutiny 	<ul style="list-style-type: none"> Must fit with Trust vision and ethos (Chief Executive to ensure) Vision and ethos should reflect CE school status. CE academies have a fixed ethos statement which should only be changed with consent of DBE.¹ Where this is a joint Anglican-Methodist School, the Trustees have joint responsibility for both the Anglican and Methodist character of the school. Principal responsible for implementation
5.	Set Academy's strategic objectives and KPIs and determine Academy Development Plan and review process		Receive (KPIs and strategic objectives)	Scrutinise (Plan) <Advise	Responsible	<Advise		<ul style="list-style-type: none"> Principal leading role in formulating (in conjunction with the Chief Executive) for LGC scrutiny 	<ul style="list-style-type: none"> Must fit with Trust strategic objectives, KPIs and Plan (Chief Executive to ensure) and reflect Ofsted and SIAMS outcomes Development plan must be in line with strategic objectives Should reflect CE or CE/Methodist school status Board of Trustees may provide templates

¹ The ethos statement is:

"Recognising its historic foundation, the "Church School" will preserve and develop its religious character in accordance with the principles of the Church and in partnership with the Church at parish and diocesan level.

The "Church School" aims to serve its community by providing education of the highest quality within the context of Christian belief and practice. It encourages an understanding of the meaning and significance of faith, and promotes Christian values through the experience it offers all its pupils."

Delegation Matrix - Hope Learning Trust - All Schools

	DECISION	MEMBERS	BOARD OF TRUSTEES	CHIEF EXECUTIVE	LGC	ACADEMY PRINCIPAL	THIRD PARTY	ADVICE	COMMENTS
6.	Complete Academy Self Evaluation Form (or equivalent)		Receive (Standards Cttee)	Scrutinise	Responsible	<Advise		<ul style="list-style-type: none"> Principal leading role in formulating for LGC scrutiny 	<ul style="list-style-type: none"> SEF to reflect progress against Development Plan Trust board may provide templates Chief Executive to scrutinise and report on outcomes to the Board
7.	Complete and keep under review Academy SIAMS self-evaluation		Receive	Scrutinise	Responsible	<Advise	See advice/ comments	<ul style="list-style-type: none"> Church Schools Scrutiny Committee to advise Trustees and LGC 	<ul style="list-style-type: none"> YDBE SLA Adviser will support through critical friend visits This should be a working document kept under regular review
8.	Involvement in Ofsted inspections and SIAMS inspections		Responsible	Responsible	Responsible	Responsible	See advice/ comments		<ul style="list-style-type: none"> Trustees and LGC members will be involved as appropriate in Ofsted inspections and SIAMS inspections. The YDBE shall notify the Academy when an inspection is due and liaise with the Academy on the relevant arrangements. The Principal will notify the Chief Executive, Chair of the Board and the Chair of the LGC that an inspection has been notified and what involvement is needed from the Board and the LGC.

Delegation Matrix - Hope Learning Trust - All Schools

	DECISION	MEMBERS	BOARD OF TRUSTEES	CHIEF EXECUTIVE	LGC	ACADEMY PRINCIPAL	THIRD PARTY	ADVICE	COMMENTS
B2 School Organisation									
9.	Determine protocol for considering taking on new academies/free schools (including due diligence arrangements)		Decide	<Advise				<ul style="list-style-type: none"> Chief Executive leading role in formulating for Trustee scrutiny 	<ul style="list-style-type: none"> Chief Executive to manage process in accordance with agreed protocol This should include the need for a conversion plan to deal with pre and post conversion matters, with an overall project manager identified, and the need for appropriate HR, Finance, buildings, legal etc advice
10.	Decide to take on a new academy/open a free school	Receive	Decide	<Advise			See advice/ comments	<ul style="list-style-type: none"> Trustees to obtain appropriate legal, HR, Finance, buildings etc advice 	<ul style="list-style-type: none"> Trustees must look carefully at all aspects of a potential academy prior to recommending an academy is taken on/free school established, given the impact that the decision may have on the academies already in the Trust
11.	Approve legal documentation associated with academy conversions		Approve	<Advise			See advice/ comments	<ul style="list-style-type: none"> Trustees will obtain appropriate Legal, HR, Finance, buildings etc advice 	<ul style="list-style-type: none"> Trustees must understand the documentary framework and what is being agreed to by entering into it. YDBE will need to approve certain documents for a CE or CE/Methodist school conversion prior to giving its final consent.
12.	Structural collaboration and partnership agreements	Receive	Decide	<Advise	Recommend ACADEMY LEVEL	<Advise ACADEMY LEVEL	See advice/ comments	<ul style="list-style-type: none"> Trustees will obtain Chief Executive advice and appropriate Legal etc advice 	<ul style="list-style-type: none"> Trust level collaboration/partnership agreements to be entered into by Trustees with advice from Chief Executive Academy level collaboration/partnership agreements to be entered into by Trustees following a recommendation from LGC YDBE and in the case of CE/Methodist schools the Methodist Academies and Schools Trust ("MAST") should be advised if a collaboration/ partnership agreement is proposed which involves a CE or CE/Methodist school – depending on the specifics advice may be given/consent may be required.
13.	Academy closure or re-brokerage (termination of Funding Agreement)	Receive	Decide	<Advise	Advise	<Advise	See advice/ comments	<ul style="list-style-type: none"> Trustees will obtain appropriate Legal etc advice 	<ul style="list-style-type: none"> DfE consent required DfE may enforce closure or re-brokerage in appropriate circumstances. YDBE (and MAST in the case of CE/Methodist schools) should be consulted for advice in the event closure or re-brokerage is proposed. MAST/YDBE/site trustee consents may be required.

Delegation Matrix - Hope Learning Trust - All Schools

	DECISION	MEMBERS	BOARD OF TRUSTEES	CHIEF EXECUTIVE	LGC	ACADEMY PRINCIPAL	THIRD PARTY	ADVICE	COMMENTS
14.	Academy amalgamation/merger	Receive	Decide	<Advise	Advise	<Advise	See advice/comments	<ul style="list-style-type: none"> Trustees will obtain appropriate Legal etc advice 	<ul style="list-style-type: none"> YDBE (and MAST in the case of CE/Methodist schools) should be consulted as soon as possible for advice in the event amalgamation/merger is proposed. MAST/YDBE/site trustee consents may be required. DfE consent required
15.	Seeking to change Church of England designation of academy	Receive	Decide	<Advise	Advise	<Advise	See advice/comments	<ul style="list-style-type: none"> Trustees will obtain appropriate Legal etc advice 	<ul style="list-style-type: none"> YDBE (and MAST in the case of CE/Methodist schools) should be consulted as soon as possible for advice. MAST/YDBE/site trustee consents may be required. DfE consent required
16.	Agreeing other significant changes to an academy (e.g. potentially contentious proposals, changes to premises, change of age range)	Receive	Decide	<Advise	Advise	<Advise	See advice/comments		<ul style="list-style-type: none"> YDBE (and MAST in the case of CE/Methodist schools) should be consulted as soon as possible for advice. MAST/YDBE/site trustee consents may be required. DfE consent may be required
17.	Determining school session and term dates		Decide	<Advise	Recommend	<Advise			<ul style="list-style-type: none"> This allows Trustees to co-ordinate the schools in the Trust to the extent that this is desirable, whilst reflecting local needs

Delegation Matrix - Hope Learning Trust - All Schools

	DECISION	MEMBERS	BOARD OF TRUSTEES	CHIEF EXECUTIVE	LGC	ACADEMY PRINCIPAL	THIRD PARTY	ADVICE	COMMENTS
B3	Risk Management								
18.	Determine overall risk management policy and processes		Decide	<Advise				<ul style="list-style-type: none"> Chief Operating Officer to lead, advise and co-ordinate input from Finance Director and other trust level staff 	<ul style="list-style-type: none"> To include template risk register and frequency of review
19.	Review and complete Trust risk register		Responsible	<Advise				<ul style="list-style-type: none"> Chief Operating Officer to lead, advise and co-ordinate input from Finance Director and trust level staff 	<ul style="list-style-type: none"> Using agreed risk register template To reflect major school specific risks as appropriate
20.	Review and complete academy level risk register		Receive	Oversee	Responsible	<Advise		<ul style="list-style-type: none"> Principal to lead, advise and co-ordinate input from senior Academy staff 	<ul style="list-style-type: none"> Using agreed risk register template To inform Trust risk register review

Delegation Matrix - Hope Learning Trust - All Schools

	DECISION	MEMBERS	BOARD OF TRUSTEES	CHIEF EXECUTIVE	LGC	ACADEMY PRINCIPAL	THIRD PARTY	ADVICE	COMMENTS
C. Staffing									
C1 Staffing structures									
1.	Determining staffing complement – Trust level (including organisational restructuring)		Decide	<Advise				<ul style="list-style-type: none"> Chief Executive, HR and Finance Director to advise Trust Board's Resources Committee to support Board 	<ul style="list-style-type: none"> This relates to determining the Trust level staff structure. Please see below in relation to appointment to those positions.
2.	Determining staffing complement – Academy level (including organisational restructuring)		Decide (Resources Cttee – if outside agreed budget parameters)	Decide (within agreed budget parameters)	Recommend	<Advise		<ul style="list-style-type: none"> Chief Executive to lead and advise with academy level input HR and Finance advice Trust Board's Resources Committee to support Board 	<ul style="list-style-type: none"> This relates to determining the Academy level staff structure. Please see below in relation to appointment to those positions. Trustee Resources Committee to approve restructure proposals where this is outside of the agreed budget parameters Where a restructure is within agreed budget parameters, the COO and Finance Director will work with the academy and make a recommendation to the CEO for approval. This decision should then be ratified at the next scheduled Trustee Resources Committee meeting
3.	Setting terms and conditions of employment, Trust wide HR policies and procedures and staff handbook		Decide	<Advise				<ul style="list-style-type: none"> Chief Executive & HR Director to lead and advise Trust Board's Resources Committee to support Board 	<ul style="list-style-type: none"> Need to ensure local differences and TUPE considerations taken into account Policies to include e.g. recruitment, probation and induction, pay, appraisal, conduct and disciplinary, grievance, capability, absence management, professional development, equality, expenses Chief Executive to report to Trustees on any material concerns about operation of policies and procedures YDBE/MAST guidance to be considered in relation to ability to ask for Christian commitment /ability and fitness to preserve and develop the religious character of the academy in the appointment of certain members of staff.

Delegation Matrix - Hope Learning Trust - All Schools

	DECISION	MEMBERS	BOARD OF TRUSTEES	CHIEF EXECUTIVE	LGC	ACADEMY PRINCIPAL	THIRD PARTY	ADVICE	COMMENTS
4.	Carry out and maintain central record of recruitment and vetting checks on staff		Scrutinise (Safeguarding Trustee)	Responsible – Trust level staff Oversee – Academy staff	Scrutinise ACADEMY LEVEL (Safeguarding LGC member)	Responsible – Academy staff		<ul style="list-style-type: none"> Chief Executive responsible for Trust wide staff, Principal responsible for Academy staff (HR Director to advise and manage) 	
5.	Maintain register of staff interests		Receive	Responsible – Trust wide staff	Receive	Responsible – Academy staff		<ul style="list-style-type: none"> HR Director to advise and manage 	<ul style="list-style-type: none"> Interests should be brought to the attention of decision makers as appropriate.
C2 Trust level appointments									
6.	Appointment and dismissal of Chief Executive	Decide	Decide				See advice/ comments	<ul style="list-style-type: none"> HR Adviser to support and advise 	<ul style="list-style-type: none"> Must be in accordance with Trust approved HR policies YDBE should be contacted when it is clear a recruitment process is required for a Chief Executive, for advice on YDBE's involvement in the process.
7.	Performance Management and pay review of Chief Executive		Decide, Responsible				See advice/ comments	<ul style="list-style-type: none"> HR Adviser to support and advise Independent advisor should support appraisal process 	<ul style="list-style-type: none"> Must be in accordance with Trust approved HR policies Panel of 3 Trustees (including the Chair) should be selected by the Board to carry out the performance management.
8.	Appointment and dismissal of Deputy Chief Executive		Decide						<ul style="list-style-type: none"> Must be in accordance with Trust approved HR policies YDBE should be contacted when it is clear a recruitment process is required for a Deputy Chief Executive or Chief Operations Officer, for advice on YDBE's involvement in the process.
9.	Performance Management and pay review of Deputy Chief Executive		Decide, Responsible						<ul style="list-style-type: none"> Must be in accordance with Trust approved HR policies Panel of 3 Trustees (including the Chair) should be selected by the Board to carry out the performance management.
10.	Appointment and dismissal of Chief Operations Officer		Decide	Advise					<ul style="list-style-type: none"> Must be in accordance with Trust approved HR policies

Delegation Matrix - Hope Learning Trust - All Schools

DECISION	MEMBERS	BOARD OF TRUSTEES	CHIEF EXECUTIVE	LGC	ACADEMY PRINCIPAL	THIRD PARTY	ADVICE	COMMENTS
11. Performance Management and pay review of Chief Operations Officer			Decide, Responsible					<ul style="list-style-type: none"> Must be in accordance with Trust approved HR policies Panel of 3 Trustees (including the Chair) should be selected by the Board to carry out the performance management.
12. Appointment and dismissal of School Improvement Directors			Decide	Recommend			<ul style="list-style-type: none"> HR Adviser to support and advise 	<ul style="list-style-type: none"> Must be in accordance with Trust approved HR policies Line managed by Chief Executive
13. Appointment and dismissal of Finance Director			Decide	<Advise			<ul style="list-style-type: none"> HR Adviser to support and advise 	<ul style="list-style-type: none"> Must be in accordance with Trust approved HR policies Line managed by Chief Executive To act as chief financial officer for delivery of Trust's detailed accounting requirements This individual should attend board meetings (and committee meetings as appropriate)
14. Appointment and dismissal of HR Director			Decide	<Advise			<ul style="list-style-type: none"> HR Advice 	<ul style="list-style-type: none"> Must be in accordance with Trust approved HR policies Line managed by Chief Executive
15. Appointment and dismissal of Operations Director			Decide	<Advise			<ul style="list-style-type: none"> HR Advice 	<ul style="list-style-type: none"> Must be in accordance with Trust approved HR policies Line managed by Chief Executive
16. Appoint and dismiss Governance Officer			Decide	<Advise			<ul style="list-style-type: none"> HR Adviser to support and advise 	<ul style="list-style-type: none"> Must be in accordance with Trust approved HR policies May be an additional responsibility for an existing member of staff e.g. likely to also be Company Secretary (see above) and person with responsibility for overseeing admissions. Potentially also the Clerk to the Trust Board.
17. Appointment and dismissal of other director level posts (to include Estates, Information)			Decide	<Advise			<ul style="list-style-type: none"> HR Advice 	<ul style="list-style-type: none"> Must be in accordance with Trust approved HR policies Line managed by Chief Executive
18. Other trustwide appointments and dismissals			Receive	Responsible			<ul style="list-style-type: none"> HR Advice 	<ul style="list-style-type: none"> Must be in accordance with Trust approved HR policies
19. Performance management and pay review of trust wide appointments			Receive	Responsible			<ul style="list-style-type: none"> HR Advice 	<ul style="list-style-type: none"> Must be in accordance with Trust approved HR policies

Delegation Matrix - Hope Learning Trust - All Schools

	DECISION	MEMBERS	BOARD OF TRUSTEES	CHIEF EXECUTIVE	LGC	ACADEMY PRINCIPAL	THIRD PARTY	ADVICE	COMMENTS
C3 Academy level appointments									
20.	Appointment / dismissal of Executive Principal		Decide	Recommend				<ul style="list-style-type: none"> HR Advisor to support and advise 	<ul style="list-style-type: none"> Must be in accordance with Trust approved HR policies Trustwide position – Chief Executive and Trustees to sit on panel to interview and recommend to Board for approval. YDBE/MAST should be contacted for advice on the process, when it is clear a recruitment process is required for an Executive Principal who will have oversight of a church school, Where it is deemed that there is no suitable internal candidate, the Trust will go to a national advert. Line managed by Chief Executive.
21.	Appointment / dismissal of Headteacher / Principal		Decide	Recommend	Consultation		See advice/ comments	<ul style="list-style-type: none"> HR Adviser to support and advise 	<ul style="list-style-type: none"> Must be in accordance with Trust approved HR policies After consultation with the LGC, the CEO can transfer existing Principals/HTs between schools within the Trust. The final decision rests with the Trust Board. Where it is deemed that there is no suitable internal candidate, the Trust will go to a national advert. Chief Executive and LGC panel to interview and recommend. Trustees will send one of their member to sit on panel. At least one Anglican Foundation Local Governor (and one Anglican Foundation Local Governor and one Methodist Foundation Governor in the case of CE/Methodist schools) to be on panel. Line managed by Chief Executive. YDBE/MAST should be contacted when it is clear a recruitment process is required for a Principal, for advice and to arrange YDBE/MAST involvement (as appropriate) in the process.

Delegation Matrix - Hope Learning Trust - All Schools

	DECISION	MEMBERS	BOARD OF TRUSTEES	CHIEF EXECUTIVE	LGC	ACADEMY PRINCIPAL	THIRD PARTY	ADVICE	COMMENTS
22.	Appointment / dismissal of Deputy Headteacher / Vice-Principal and Assistant Headteacher / Assistant Principal		Decide	Recommend	Consultation		See advice/ comments	<ul style="list-style-type: none"> HR Adviser to support and advise 	<ul style="list-style-type: none"> Must be in accordance with Trust approved HR policies After consultation with the LGC, the CEO can transfer existing Deputy Principals/Deputy HTs/Vice-Principals and Assistant Headteachers/Assistant Principals between schools within the Trust. The final decision rests with the Trust Board. Where it is deemed that there is no suitable internal candidate, the Trust will go to a national advert. Chief Executive and LGC panel to interview and recommend. Trustees will send one of their member to sit on panel. At least one Anglican Foundation Local Governor (and one Anglican Foundation Local Governor and one Methodist Foundation Governor in the case of CE/Methodist schools) to be on panel. YDBE/MAST (as appropriate) should be contacted when it is clear a recruitment process is required for a Deputy Principal, for advice and to arrange YDBE/MAST involvement in the process.
23.	Performance management and pay of Principal		Decide	Recommend	Recommend			<ul style="list-style-type: none"> HR Adviser to support and advise Independent advisor should support appraisal process 	<ul style="list-style-type: none"> Must be in accordance with Trust approved HR policies Chief Executive to performance manage. Advisory role for LGC including key role for Methodist and Anglican Local Governor.
24.	Appointment of other Senior Leadership Team positions – secondary level (those appointed to or currently on the Leadership Scale other than colleagues covered by point 22 above)		Informed (report to Chair/Chair of Standards)	Decide (with Principal and LGC rep – see comments)		Decide (with CEO and LGC rep – see comments)		<ul style="list-style-type: none"> HR Adviser to support and advise 	<ul style="list-style-type: none"> Must be in accordance with Trust approved HR policies Principal to identify vacancy with CEO/HR and work together to see if there is a suitable candidate internally who can be appointed to the position. Where it is deemed that there is no suitable internal candidate, the Trust will go to a national advert. Principal to interview along with CEO and member of the LGC. Line managed by Principal

Delegation Matrix - Hope Learning Trust - All Schools

	DECISION	MEMBERS	BOARD OF TRUSTEES	CHIEF EXECUTIVE	LGC	ACADEMY PRINCIPAL	THIRD PARTY	ADVICE	COMMENTS
25.	Appointment of other Senior Leadership Team positions – primary level (those appointed to or currently on the Leadership Scale other than colleagues covered by point 22 above)		Informed (report to Chair/Chair of Standards)	Decide – delegate to Executive Principal for Primary (with Principal and LGC rep – see comments)		Decide (with Exec. Principal for Primary and LGC rep – see comments)		<ul style="list-style-type: none"> HR Adviser to support and advise 	<ul style="list-style-type: none"> Must be in accordance with Trust approved HR policies Principal to identify vacancy with Exec Principal for Primary/HR and work together to see if there is a suitable candidate internally who can be appointed to the position. Where it is deemed that there is no suitable internal candidate, the Trust will go to a national advert. Principal to interview along with Exec. Principal for Primary and member of the LGC. Line managed by Principal
26.	Appointment of special needs co-ordinator (SENCO)				Decide (unless delegated)	Decide (where delegated)		<ul style="list-style-type: none"> HR Adviser to support and advise 	<ul style="list-style-type: none"> LGC panel plus Principal to interview and decide unless LGC delegate particular appointment to Principal Any allocated SEND local governor to be involved as appropriate Line managed by Principal
27.	Appointment of educational visits co-ordinator				Decide (unless delegated)	Decide (where delegated)		<ul style="list-style-type: none"> HR Adviser to support and advise 	<ul style="list-style-type: none"> Must be in accordance with Trust approved HR policies LGC panel plus Principal to interview and decide unless LGC delegate particular appointment to Principal or other Line managed by Principal
28.	Appointment safeguarding /child protection officer (designated senior person) and a deputy				Decide (unless delegated)	Decide (where delegated)		<ul style="list-style-type: none"> HR Adviser to support and advise 	<ul style="list-style-type: none"> Must be in accordance with Trust approved HR policies LGC panel plus Principal to interview and decide unless LGC delegate particular appointment to Principal Line managed by Principal
29.	Appointment of academy business manager or equivalent				Decide	Decide		<ul style="list-style-type: none"> HR Adviser, Finance Director and CEO to support and advise 	<ul style="list-style-type: none"> Must be in accordance with Trust approved HR policies Panel to include: <ul style="list-style-type: none"> Principal Trust's Finance Director Chair of Local Governors/Chair of Resources Committee Line managed by Principal / Trust Finance Director (to determine)
30.	Appointment other Academy staff positions				Decide (unless delegated)	Decide (where delegated)		<ul style="list-style-type: none"> HR Adviser to support and advise Where decisions not delegated to Principal, Principal will be asked to advise 	<ul style="list-style-type: none"> Must be in accordance with Trust approved HR policies Appointment decisions may be delegated to the Principal (or further delegated where reflected in agreed policy) Line managed by Principal or other SLT member

Delegation Matrix - Hope Learning Trust - All Schools

	DECISION	MEMBERS	BOARD OF TRUSTEES	CHIEF EXECUTIVE	LGC	ACADEMY PRINCIPAL	THIRD PARTY	ADVICE	COMMENTS
31.	Performance management and pay review of Academy level appointments (other than Principal)		Approve (Resources Cttee)	Review		Recommend		<ul style="list-style-type: none"> HR Adviser to support and advise 	<ul style="list-style-type: none"> Must be in accordance with Trust approved HR policies Line manager to run process Where Principal is not line manager, the Principal may be involved in process (as appropriate) Summary report to the Trust Resources Committee for approval by 31st October.

Delegation Matrix - Hope Learning Trust - All Schools

	DECISION	MEMBERS	BOARD OF TRUSTEES	CHIEF EXECUTIVE	LGC	ACADEMY PRINCIPAL	THIRD PARTY	ADVICE	COMMENTS
D. Pupil/Student matters									
D1 Education provision									
1.	Standards of teaching		Oversee (Trust wide) (Standards Committee)	Responsible (Trust wide) <Advise	Oversee (Academy level) Advise	Responsible (Academy level) <Advise		<ul style="list-style-type: none"> Advice and support from School Improvement Lead as required Analysis of standards information to be provided by Principal to LGC and Chief Executive to enable appropriate scrutiny 	<ul style="list-style-type: none"> Principal responsible for observing and evaluating performance at Academy level and securing improvement, under oversight of Chief Executive. Trustees & Members to receive agreed level of reporting (see section A above). Key role for Trust Standards Committee.
2.	Pupil progress and attainment		Oversee (Standards Committee)	Responsible <Advise	Oversee, Advise	Responsible <Advise		<ul style="list-style-type: none"> Advice and support from School Improvement Lead as required Analysis of progress and attainment to be provided by Principal to LGC and Chief Executive to enable appropriate local scrutiny 	<ul style="list-style-type: none"> Principal responsible for progress and attainment and securing improvement at Academy level, under oversight of Chief Executive and LGC. Trustees & Members to receive agreed level of reporting (see section A above) Key role for Trust Standards Committee.
3.	Setting curriculum policy			Approve	Recommend	<Advise		<ul style="list-style-type: none"> Advice and support from School Improvement Lead as required 	<ul style="list-style-type: none"> Curriculum must be balanced and broadly based and comply with the terms of any curriculum policy/requirements determined by the Board
4.	Curriculum provision			Oversee	Oversee	Responsible			<ul style="list-style-type: none"> Principal to implement in line with policy, overseen by Chief Executive

Delegation Matrix - Hope Learning Trust - All Schools

	DECISION	MEMBERS	BOARD OF TRUSTEES	CHIEF EXECUTIVE	LGC	ACADEMY PRINCIPAL	THIRD PARTY	ADVICE	COMMENTS
5.	Setting RE policy			Oversee	Approve	Recommend	See advice/ comments	<ul style="list-style-type: none"> YDBE provides advice regarding policy and syllabus Church School Scrutiny Committee to advise and support 	<ul style="list-style-type: none"> Must comply with the terms of any curriculum policy/requirements determined by the Board. Must ensure academy is meeting the relevant statutory requirements for RE and satisfying the requirements of the National Church of England Board of Education Statement of Entitlement. Denominational syllabus to be followed (former VA schools) The locally agreed syllabus should be followed (although reserved teachers may be needed to teach RE in accordance with the Academy's trust deed/tenets of the Church of England/Methodist Church in certain cases. YDBE's guidance should be sought). Key involvement for Methodist and Anglican Foundation Local Governors
6.	RE provision			Oversee	Oversee	Responsible <Advise	See advice/ comments	<ul style="list-style-type: none"> YDBE/MAST provides advice regarding provision Church School Scrutiny Committee to advise and support 	<ul style="list-style-type: none"> Principal to implement agreed policy, overseen by Chief Executive Key involvement for Anglican and Methodist Foundation Local Governors in monitoring
7.	Examinations				Oversee	Responsible			<ul style="list-style-type: none"> Principal to ensure appropriate arrangements put in place for examinations
8.	Determining Collective Worship policy			Oversee	Approve	Recommend	See advice/ comments	<ul style="list-style-type: none"> YDBE/MAST provides advice regarding policy Church School Scrutiny Committee to advise and support 	<ul style="list-style-type: none"> Must be in accordance with any provision of the trust deed and/or tenets and practices of the Church of England/Methodist Church Key involvement for Anglican and Methodist Foundation Local Governors
9.	Collective Worship provision				Oversee	Responsible <Advise	See advice/ comments	<ul style="list-style-type: none"> YDBE/MAST provides advice regarding provision Church School Scrutiny Committee to advise and support 	<ul style="list-style-type: none"> Principal to implement agreed policy Key involvement for Anglican and Methodist Foundation Local Governors in monitoring

Delegation Matrix - Hope Learning Trust - All Schools

	DECISION	MEMBERS	BOARD OF TRUSTEES	CHIEF EXECUTIVE	LGC	ACADEMY PRINCIPAL	THIRD PARTY	ADVICE	COMMENTS
10.	Determining SMSC policy			Oversee	Approve	Recommend	See advice/ comments	<ul style="list-style-type: none"> YDBE/MAST provides advice regarding policy Church School Scrutiny Committee to advise and support 	<ul style="list-style-type: none"> Key involvement for Anglican and Methodist Foundation Local Governors
11.	SMSC provision			Oversee	Oversee	Responsible <Advise	See advice/ comments	<ul style="list-style-type: none"> YDBE/MAST provides advice regarding provision Church School Scrutiny Committee to advise and support 	<ul style="list-style-type: none"> Principal to implement agreed policy Key involvement for Anglican and Methodist Foundation Local Governors
12.	Determining sex education policy				Responsible	Recommend			
13.	Sex education provision				Oversee	Responsible <Advise			<ul style="list-style-type: none"> Principal to implement agreed policy
14.	Determining off site visits policy		Approve	Recommend Oversee	Oversee	Responsible			<ul style="list-style-type: none"> Principal to implement agreed policy at Academy level, overseen by Chief Executive Should dovetail with health and safety policy Policy should require that potentially hazardous activities are referred to the Board for approval Chief Executive to report to Trustees on any material concerns about operation of policy
15.	Careers advice provision				Oversee	Responsible			
16.	Community and after school provision (extended schools)			Oversee	Oversee	Responsible		<ul style="list-style-type: none"> See section G below in relation to use of school premises 	
D2 Behaviour, attendance and welfare									
17.	Determining behaviour and discipline policy (including exclusions)			Oversee	Approve	Recommend		<ul style="list-style-type: none"> Church School Scrutiny Committee to advise and support 	<ul style="list-style-type: none"> Principal to implement, overseen by Chief Executive Chief Executive to report to Trustees on any material concerns about operation of policy

Delegation Matrix - Hope Learning Trust - All Schools

	DECISION	MEMBERS	BOARD OF TRUSTEES	CHIEF EXECUTIVE	LGC	ACADEMY PRINCIPAL	THIRD PARTY	ADVICE	COMMENTS
18.	Home school agreements (if required)				Approve	Recommend			<ul style="list-style-type: none"> Principal responsible for co-ordinating and managing
19.	Exclusions – decision to exclude					Responsible			<ul style="list-style-type: none"> May be for one or more fixed periods (up to a maximum of 45 school days in a single academic year), or permanently. The Principal may withdraw an exclusion that has not been reviewed by the LGC.
20.	Notifications of exclusions				Receive	Responsible			<ul style="list-style-type: none"> Principal to notify LGC and others in accordance with Exclusions Code Depending on exclusion, this will be either without delay or once a term. Notifications must include the reasons and duration
21.	Exclusions – to review overall pattern and use of exclusions			Oversee	Responsible	<Advise			<ul style="list-style-type: none"> Trustees to receive agreed level of reporting (see Section A above)
22.	Exclusions – arrange alternative provision				Oversee	Responsible			<ul style="list-style-type: none"> Arrange alternative provision in accordance with Exclusions Code
23.	Exclusions – to review exclusion decisions and consider reinstatement in applicable cases				Responsible				<ul style="list-style-type: none"> Can be delegated to sub-committee of at least 3 LGC members from across the Trust Can be delegated to Chair of LGC where permitted by Exclusions Code
24.	Exclusions - To establish independent appeals panel		Responsible	<Advise				<ul style="list-style-type: none"> Advice and support from Governance Officer 	<ul style="list-style-type: none"> Must be in line with exclusions statutory guidance
25.	Pupil attendance			Oversee	Oversee	Responsible			<ul style="list-style-type: none"> Trustees to receive agreed level of reporting (see Section A above)
26.	Safeguarding and child protection policy		Approve	Recommend Oversee	Oversee ACADEMY LEVEL				<ul style="list-style-type: none"> Principal to implement at academy level, overseen by Chief Executive Chief Executive to report to Trustees on any material concerns about operation of policy

Delegation Matrix - Hope Learning Trust - All Schools

	DECISION	MEMBERS	BOARD OF TRUSTEES	CHIEF EXECUTIVE	LGC	ACADEMY PRINCIPAL	THIRD PARTY	ADVICE	COMMENTS
D3 School meals									
27.	Provision of school meals				Oversee	Responsible			<ul style="list-style-type: none"> • Must include provision of free school meals to those eligible • Must be in accordance with nutritional standards
D4 Admissions									
28.	Determining admissions policy		Approve	<Advise	Recommend	<Advise	See advice/ comments	<ul style="list-style-type: none"> • Church School Scrutiny Committee to advise and support 	<ul style="list-style-type: none"> • YDBE/MAST guidance and advice should be sought for former CE and CE/Methodist VA and Foundation schools • Key involvement for Anglican and Methodist Foundation Local Governors
29.	Admissions application decisions				Responsible	<Advise			<ul style="list-style-type: none"> • Principal responsible for co-ordinating and managing process • Must be in accordance with published admission arrangements • The whole LGC must make the decision as to who will be offered places
30.	Arrangement of independent appeals panel			Advise>	Responsible	<Advise		<ul style="list-style-type: none"> • Advice and support from Governance Officer / Local Authority 	<ul style="list-style-type: none"> • Must be an independent panel established in accordance with the Admissions Appeals Code
31.	Appeals against LA directions to admit pupils				Responsible	<Advise			

Delegation Matrix - Hope Learning Trust - All Schools

	DECISION	MEMBERS	BOARD OF TRUSTEES	CHIEF EXECUTIVE	LGC	ACADEMY PRINCIPAL	THIRD PARTY	ADVICE	COMMENTS
E. Accessibility									
1.	Accessibility plan				Responsible	Recommend			<ul style="list-style-type: none"> Plan for increasing accessibility to disabled pupils (curriculum, physical environment, information)
2.	Equality information and objectives statement and equality objectives		Approve	Recommend	Advise	<Advise		<ul style="list-style-type: none"> Chief Executive to co-ordinate process with input from Principal and others as required 	<ul style="list-style-type: none"> Requirement to draw up and publish equality objectives every four years and annually publish information demonstrating how meeting the aims of the general public sector equality duty.
3.	Determine SEND and inclusion policies		Approve	Recommend	Recommend	<Advise Responsible		<ul style="list-style-type: none"> Advice from SENCO 	<ul style="list-style-type: none"> To include social disadvantage, equality, disability discrimination, looked after children, pupil premiums Trustees may provide templates for tailoring at local level There should be a member of the LGC with specific oversight of the school's arrangements for SEN and disability Principal to implement at Academy level (overseen by Chief Executive) Chief Executive to report to Trustees on any material concerns about operation of policy
4.	Reviewing and challenging effectiveness of SEND and inclusion policies and decisions		Responsible (Trust wide)	<Advise	Responsible (Academy level), Advise	<Advise			<ul style="list-style-type: none"> Review to be completed at least annually
5.	SEN information report		Approve	<Advise	Recommend	<Advise			<ul style="list-style-type: none"> The SEN Information Report should be updated annually and any changes to the information occurring during the year should be updated as soon as possible Contains details about the implementation of the SEN policy Trust Board may provide templates to enable co-ordinated reporting To be produced by trustwide SEND Director

Delegation Matrix - Hope Learning Trust - All Schools

	DECISION	MEMBERS	BOARD OF TRUSTEES	CHIEF EXECUTIVE	LGC	ACADEMY PRINCIPAL	THIRD PARTY	ADVICE	COMMENTS
F. Finance and procurement									
1.	Appoint/remove auditors	Decide	Recommend					<ul style="list-style-type: none"> Finance Director to advise and manage process 	<ul style="list-style-type: none"> Key role for Resources Committee To be appointed annually at the AGM
2.	Appoint responsible officer/internal auditor/agreement of additional assurance support from auditors or other third party		Decide					<ul style="list-style-type: none"> Finance Director to advise and manage process 	<ul style="list-style-type: none"> Key role for Resources Committee
3.	Respond to auditors' report/advice		Oversee (Trust level) Responsible (Resources Committee)	Responsible (Trust level) <Advise	Oversee (Academy level matters)	Responsible (Academy level matters) <Advise		<ul style="list-style-type: none"> Finance Director to support, with assistance from Academy Finance Manager at Academy level 	<ul style="list-style-type: none"> Key role for Resources Committee
4.	Annual Report and Accounts	Receive, scrutinise	Approve (Resources Committee to scrutinise and recommend)	<Advise, Approve			See advice/ comments	<ul style="list-style-type: none"> Trust Finance Director to co-ordinate draft, with input from Chief Executive and Governance Officer Auditors to review and sign off Trustees and Accountable Officer must approve relevant sections 	<ul style="list-style-type: none"> Key role for Resources Committee The Members should receive and scrutinise the accounts at their AGM The document should be filed with Companies House and the DfE and uploaded onto the Trust's website
5.	Establish financial policies, procedures, regulations and internal financial controls		Approve (Resources Committee to recommend)	Recommend <Advise				<ul style="list-style-type: none"> Finance Director to support and advise 	<ul style="list-style-type: none"> Including financial delegations, investment policy, procurement policy, borrowing, charging and remissions policy, reserves policy etc and reflect who can sign off on financial reporting etc. Key role for Resources Committee Principals to implement at Academy level, overseen by Chief Executive Chief Executive to report to Trustees on any material concerns about operation of policy

Delegation Matrix - Hope Learning Trust - All Schools

	DECISION	MEMBERS	BOARD OF TRUSTEES	CHIEF EXECUTIVE	LGC	ACADEMY PRINCIPAL	THIRD PARTY	ADVICE	COMMENTS
6.	Agree a funding model for Trust (including academies)		Approve (Resources Committee to recommend)	Recommend <Advise	Advise	<Advise		<ul style="list-style-type: none"> Finance Director to support and advise 	<ul style="list-style-type: none"> Key role for Resources Committee
7.	Set Trust budget		Approve (Resources Committee to recommend)	Recommend <Advise				<ul style="list-style-type: none"> Finance Director to support and advise 	<ul style="list-style-type: none"> Key role for Resources Committee
8.	Monitor trust wide expenditure		Responsible (Resources Committee)	<Advise				<ul style="list-style-type: none"> Finance Director to support and advise 	<ul style="list-style-type: none"> Key role for Resources Committee
9.	Set academy budget		Approve (Resources Committee to recommend)	<Advise	Recommend	<Advise		<ul style="list-style-type: none"> Finance Director to support and advise LGC to make recommendations with support and advice from Local Finance Manager 	<ul style="list-style-type: none"> Must be in line with overall Trust budget Key role for Trust Resources Committee
10.	Monitor academy expenditure		Oversee	Oversee	Responsible	<Advise		<ul style="list-style-type: none"> Local Finance Manager to support and advise 	<ul style="list-style-type: none"> Expenditure must be in line with agreed budget Regular reporting to take place to Finance Director to inform Trust wide monitoring
11.	Determine central services provision, establish own central operations and/or procure from third parties		Approve (Resources Committee)	Recommend <Advise	Advise	<Advise		<ul style="list-style-type: none"> Finance Director to support and advise 	<ul style="list-style-type: none"> Key role for Resources Committee
12.	Opening bank account		Approve					<ul style="list-style-type: none"> Finance Director to support and advise 	<ul style="list-style-type: none"> All bank accounts must be in the name of the Trust and operated in accordance with the Financial regulations
13.	Asset register		Receive	Responsible – TRUST WIDE	Receive	Responsible – ACADEMY LEVEL		<ul style="list-style-type: none"> Finance Director to support and advise COO / Estates Director to support and advise 	

Delegation Matrix - Hope Learning Trust - All Schools

	DECISION	MEMBERS	BOARD OF TRUSTEES	CHIEF EXECUTIVE	LGC	ACADEMY PRINCIPAL	THIRD PARTY	ADVICE	COMMENTS
G. Health and safety, insurance and premises and extended schools									
1.	Approval of Health and safety policy and arrangements		Approve, Oversee (Resources Committee to recommend)	Responsible	Oversee	Responsible			<ul style="list-style-type: none"> Chief Executive responsible for ensuring appropriate health and safety procedures are in place in line with approved policy and are operating effectively Principals to implement policy at Academy level and oversee operation of procedures (overseen by Chief Executive and advising Chief Executive in relation to significant issues). Policy to include appropriate reporting mechanisms at Member, Trustee and LGC level.
2.	Obtaining insurance for land and trust & academy operations		Decide	Recommend <Advise		<Advise		<ul style="list-style-type: none"> Finance Director, COO and Estates Director to advise and support and liaise with broker 	<ul style="list-style-type: none"> To include Director & Officer cover, buildings and contents, business continuity, employers' and public liability insurance, motor vehicle cover etc as required Must include insurance required to comply with Church Supplemental Agreement (or otherwise as agreed in any RPA side letter applicable to the Academy). Chief Executive to ensure details of insurance policy requirements appropriately disseminated
3.	Agree site strategy and development master plan		Decide	<Advise	Advise	<Advise	See advice/ comments	<ul style="list-style-type: none"> Finance Director, COO and Estates Director to advise and support 	<ul style="list-style-type: none"> YDBE (and MAST in the case of CE/Methodist schools) advice should be obtained.
4.	Maintenance of premises				Oversee	Responsible	See advice/ comments	<ul style="list-style-type: none"> Estates Director to advise and support 	<ul style="list-style-type: none"> The site and buildings must be kept in the condition required by the Church Supplemental Agreement
5.	Maintain academy Premises management documents (e.g. asbestos, fire safety, statutory testing)		Oversee	Oversee	Oversee	Responsible			<ul style="list-style-type: none"> Principal to ensure appropriate documents in place (overseen by the Chief Executive). Chief Executive to report any material concerns to Trust Board and LGC
6.	Approving Capital projects/building works		Decide	<Advise	Advise	<Advise	See advice/ comments	<ul style="list-style-type: none"> Finance Director, COO and Estates Director to advise and support 	<ul style="list-style-type: none"> YDBE (and MAST in the case of CE/Methodist schools) advice and any necessary site trustee consents should be obtained in relation to land and/or buildings prior to work beginning LA lease should be checked prior to any works on LA land and any necessary consents obtained All necessary DfE approvals should be obtained

Delegation Matrix - Hope Learning Trust - All Schools

	DECISION	MEMBERS	BOARD OF TRUSTEES	CHIEF EXECUTIVE	LGC	ACADEMY PRINCIPAL	THIRD PARTY	ADVICE	COMMENTS
7.	Managing Academy capital projects/building works/maintenance		Oversee Over £5,000	Responsible Over £5,000	Oversee Up to £5,000	Responsible Up to £5,000		<ul style="list-style-type: none"> Finance Director/Local Finance manager, COO and Estates Director to advise and support 	<ul style="list-style-type: none"> All necessary DfE processes should be followed
8.	Site security			Oversee	Oversee (Academy level)	Responsible (Academy level)		<ul style="list-style-type: none"> Finance Director, COO and Estates Director to advise and support 	<ul style="list-style-type: none"> Chief Executive to oversee overarching arrangements across Trust
9.	Acquiring and disposing of land (including leases, licences and easements)		Decide	<Advise	Recommend (Academy specific)	<Advise	See advice/ comments	<ul style="list-style-type: none"> Finance Director, COO and Estates Director to advise and support 	<ul style="list-style-type: none"> LA lease should be checked prior to making any disposal of LA land All necessary DfE approvals should be obtained Only the Site Trustees can dispose of or encumber their land – YDBE (and MAST in the case of CE/Methodist schools) advice should be obtained.
10.	Determining permissible external and community use policy (letting/licencing/shared use arrangements)		Decide	Recommend			See advice/ comments	<ul style="list-style-type: none"> Finance Director, COO and Estates Director to advise and support 	<ul style="list-style-type: none"> Policy should reflect requirement to obtain any necessary DfE/LA/site trustee consents. The use should not be at odds with the ethos/aims of Church of England (and the Methodist Church in the case of CE/Methodist schools) or be in breach of the trusts upon which the Site Trustees hold the school site. Policy should reflect what happens to any revenue generated from such use.
11.	Managing external and community use			Oversee	Oversee	Responsible		<ul style="list-style-type: none"> Local business manager to advise and support 	<ul style="list-style-type: none"> Must be in accordance with agreed policy

Delegation Matrix - Hope Learning Trust - All Schools

	DECISION	MEMBERS	BOARD OF TRUSTEES	CHIEF EXECUTIVE	LGC	ACADEMY PRINCIPAL	THIRD PARTY	ADVICE	COMMENTS
H. Communications, information and complaints									
H1 External communications									
1.	Trust prospectus		Oversee	Responsible					
2.	School prospectus			Oversee	Oversee	Responsible		<ul style="list-style-type: none"> School Improvement Lead to advise and support 	<ul style="list-style-type: none"> Chief Executive to ensure prospectus in line with Trust requirements (templates will be provided)
3.	Trust website		Oversee	Responsible				<ul style="list-style-type: none"> Clerk and Executive PA to support on compliance 	<ul style="list-style-type: none"> Chief Executive to ensure legally compliant and that it dovetails appropriately with Academy websites
4.	Academy website			Oversee	Oversee	Responsible		<ul style="list-style-type: none"> Clerk and Executive PA to support on compliance 	<ul style="list-style-type: none"> Principal to ensure legally compliant, overseen by Chief Executive Chief Executive to ensure dovetails appropriately with Trust website (for secondary academies, website should follow agreed HLTY template)
5.	Freedom of Information policy and publication scheme		Approve	Recommend				<ul style="list-style-type: none"> COO to support advise 	
6.	Approving press statements		Approve (Chair, as appropriate)	Approve (Trust matters)		Approve (Academy matters)			<ul style="list-style-type: none"> Press statements that are of a controversial nature should be referred to the CEO for their approval (and the Chair where appropriate)
H2 Complaints									
7.	Determining complaints policy and procedure statement		Approve	Recommend				<ul style="list-style-type: none"> COO and Clerk to support and advise 	<ul style="list-style-type: none"> Policy to provide for local management of complaints, with escalation to Trust Board where necessary. Policy to include appropriate reporting at Trustee and LGC level.
8.	Implementation of complaints policy and procedures			Responsible Oversee (Trust wide)	Oversee (Academy level)	Responsible (Academy level)			<ul style="list-style-type: none"> Chief Executive to implement in relation to trust wide complaints, Principal to implement in relation to Academy complaints, overseen by Chief Executive Chief Executive to report to Trustees on any material concerns about operation of policy

Delegation Matrix - Hope Learning Trust - All Schools

	DECISION	MEMBERS	BOARD OF TRUSTEES	CHIEF EXECUTIVE	LGC	ACADEMY PRINCIPAL	THIRD PARTY	ADVICE	COMMENTS
H3 Information management									
9.	Data protection and document management policy		Approve	Recommend < Advise				<ul style="list-style-type: none"> COO to advise 	<ul style="list-style-type: none"> Policy to include appropriate reporting at Trustee and LGC level.
10.	Implementation of data protection policy and procedures		Oversee (Resources Cttee)	Responsible Oversee	Oversee (Academy level)	Responsible (Academy level)			<ul style="list-style-type: none"> All data breaches to be reported to the Data Protection Officer in line with the data protection policy Principal to notify LGC and Chief Executive of any material concerns/breaches to Chief Executive. Chief Executive to report any material concerns/breaches to Trust Board
11.	Pupil records (including attendance register)			Oversee	Oversee	Responsible			