

KEY

Level 1: Members

Level 2: Trust Board

Level 3: CEO

Level 4: Director of Finance & Operations

Level 5: Principal/Associate Principal

Key function	Ref	Tasks	1	2	3	4	5
Budget	1	To approve the first formal budget plan in each financial year		X			
	2	To monitor monthly expenditure				X	
	3	To establish a charging and remissions policy		X			
	4	To enter into contracts			X	X	
	5	To make payments				X	
	6	Miscellaneous financial decisions				X	
Staffing	7	Principal appointments (selection panel)			X		
	8	Deputy appointments (selection panel)			X		
	9	Appointment of school based teaching and all support staff			X		X
	10	Appointment of central Trust staff (shared services). Director posts ratified by the Board			X	X	
	11	Agree a pay policy		X			
	12	Implement pay policy			X	X	
	13	Receive annual recommendations on salary		X			
	14	Decisions/appeals arising out of pay and performance management policies			X		
	15	Undertake Principal's performance review			X		
	16	Establish staff disciplinary and capability procedure			X		
	17	Dismissal of principal			X		
	18	Dismissal of other school based staff			X		
	19	Suspension of principal/associate principal			X		
	20	Suspension of school based staff			X		
	21	Suspension of central Trust staff		X			
	22	Ending suspension of principal/associate principal			X		
	23	Ending suspension of school based staff (except principal)			X		
	24	Ending suspension of central staff		X			
	25	Determining staff complement in each school			X		
	26	Determining staff complement – central Trust services			X	X	
	27	Determining dismissal payments/early retirement				X	
	28	Formal meetings for academy based staff re discipline, sickness absence and capability, grievance, special leave of absence, staffing adjustment			X	X	
	29	Lead Academy case where principal has a grievance			X		

Hatton Academies Trust Scheme of Delegation

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	30	Formal warnings and dismissal decisions			X		
	31	Receive concerns from whistle blowers		X	X	X	X
	32	Determine whether a whistle blowing investigation is appropriate. (Board for CEO investigation)		X	X	X	
	33	Determine application from employee for special leave					X
	34	Determine pay policy for unqualified teachers and support staff		X			
	35	Staffing adjustment decision to consult academy staff consider response			X		
	36	Staffing adjustment decisions following consultation			X		
Curriculum	37	Ensuring national curriculum taught to all students and to consider any disapplication			X		X
	38	Establish a curriculum policy			X		X
	39	Implement curriculum policy					X
	40	Monitor implementation of curriculum policy					X
	41	Implement action to maintain teaching standards			X		X
	42	Monitor action to maintain teaching standards			X		X
	43	Determination of which subject options are to be taught, given the available resources					X
	44	Responsibility for each child's education					X
	45	Determine sex education policy for each school					X
	46	Monitor implementation of sex education policy					X
	47	To monitor for any political indoctrination			X		X
Performance Management	48	Determine a performance management policy		X	X		
	49	Implement performance management policy			X		X
	50	Annual review of performance management policy			X		
	51	Appraisal of principal			X		
Target setting	52	To set and publish targets for student achievement			X		X
Discipline and exclusions	53	To establish a student discipline policy			X		X
	54	To review the level of exclusions in each school			X		
	55	To review any permanent exclusions and fixed term exclusions where the student is either excluded for more than 15 days in total in a term or would lose the opportunity to sit a public examination			X		
	56	To direct reinstatement of excluded students		X	X		
Admissions	57	To consult annually before setting an admissions policy		X	X		
	58	To establish an admissions policy			X		
	59	Admissions: application decisions			X		

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	60	Admissions: appeals			X		X
Religious Education	61	Responsibility for ensuring provision of RE in line with school's basic curriculum					X
Collective worship	62	Arrangements for collective worship (schools without religious character)					X
Premises and insurance	63	Buildings insurance, public liability, and employers liability insurance		X		X	
	64	Developing school buildings strategy or master plan and contributing as required to Trust Asset Management Planning arrangements		X	X	X	
	65	Procuring and maintaining buildings including developing a properly funded maintenance plan		X		X	
	66	Determine health and safety policy		X		X	
	67	Monitor implementation of H&S policy				X	
	68	Ensure H&S regulations are followed				X	X
Academy organisation	69	Setting times of school sessions, term dates and holidays			X		X
	70	To ensure school meets for 380 sessions in the school year					X
	71	To ensure the school meals where provided are nutritious and value for money					X
Information for parents	72	Prepare and publish school prospectus				X	X
	73	To ensure the provision of FSM to qualifying students					X
	74	Adopt home-school agreements			X		X
Gov Body procedures	75	Determine terms of reference and any amendments		X			
	76	Appoint/remove Directors	X				
	77	Appoint local governors if applicable		X			
	78	Appoint/dismiss local clerk to Governors			X		
	79	Convene at least three Directors' meetings in any year		X			
	80	Establish and maintain Trust register of business interests		X			
	81	To approve and set up a Directors' Expenses Policy		X			
	82	To monitor SEN provision		X	X		X
	83	To consider whether or not to exercise delegation of functions to individuals or committees		X			
	84	To regulate the Board procedures (where not set out in law)		X	X		
	85	Establish LGB code of conduct (If applicable)		X			
	86	Establish complaints policy			X	X	
	87	Monitor implementation of complaints policy			X	X	
	88	Establish FOI request policy		X		X	
	90	Implement FOI policy where relevant				X	
	91	Monitor implementation of FOI request policy				X	

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Equalities Act	92	Establish single Equality Act policy		X		X	
	93	Implement single equality act policy (and objectives) at Trust level via equality action plan				X	
	94	Implement single equality act policy at academy level via academy equality action plan					X
	95	Monitor implementation of equality act policy at Trust and local level		X		X	
Data Protection	96	Establish data protection policy		X		X	
	97	Implement data protection policy in each school				X	X
	98	Monitor implementation of data protection policy in each school		X		X	
Safeguarding	99	Establish a safeguarding policy		X	X		
	100	Implement safeguarding policy and procedures					X
	101	Monitor implementation of safeguarding policy			X		
	102	Refer allegations of abuse against staff to LADO			X		X
IT	103	Establish acceptable use policy			X		
	104	Implement acceptable use policy			X		
	105	Monitor implementation of acceptable use policy			X		X
Social media usage	106	Establish social media policy			X		
	107	Implement social media policy					X
	108	Monitor implementation of social media policy			X		X