# The Athelstan Trust Scheme of Delegation

## Agreed by the board of trustees 0n 19th March 2026. To be reviewed March 2027.

**Background**

The objects of The Athelstan Trust are stated in the Articles of Association as:
*'to advance for the public benefit education in the United Kingdom, in particular but without prejudice to the generality of the foregoing, by establishing, maintaining, carrying on, managing and developing schools offering a broad and balanced curriculum ("**the mainstream Academies**") or educational institutions which are principally concerned with providing full-time or part-time education for children of compulsory school age who, by reason of illness, exclusion from school or otherwise, may not for any period receive suitable education unless alternative provision is made for them ("the **alternative provision Academies**") or 16 to 19 Academies offering a curriculum appropriate to the needs of its students ("the **16 to 19 Academies**") or schools specially organised to make special educational provision for pupils with Special Educational Needs ("the **Special Academies**")'*

**Introduction and Purpose**

The Board of The Athelstan Trust is accountable in law for all decisions about the Trust and its schools. It is vital to ensure there are systems in place so the Board is assured of the quality of education as well as the safety and good practice of activity within the Trust. However, this does not mean that the Board is required to undertake all tasks or make all the decisions itself. This Scheme of Delegation sets out the functions delegated by the Board within the Trust's governance structure. This document, together with the committee structures and terms of reference, will be reviewed at least annually by the Board but may be updated when levels of delegation need updating, e.g. if there is a change in statutory guidance. The document makes specific reference to CST's Scheme of Delegation checklist: Scheme of delegation checklists. The intention of the document is to:

- Set out delegations for specific areas of activity or decision making in a clear, usable format
- Provide clarity, consistency and avoid duplication or overlap in governance

There may be circumstances where the Board will need to intervene to choose to withdraw specific delegated authorities although these are expected to be the exception rather than the rule. Possible examples where this may be required include, but are not limited to, significant concerns within a school which may relate to safeguarding, finance, educational performance, equality, compliance or an adverse Ofsted inspection.

The delegations have been drafted based on an assumption that the functions will be carried out in line with the Trust's Article of Association, agreed Trust policies or approaches, as well as to meet all compliance requirements. Where significant concerns or issues arise, and in line with Trust policies as well as regulator's requirements, it is recognised that these may be raised by exception with the Board or other Trust stakeholders. The Board reserves the right to amend this Scheme of Delegation when necessary.

The Athelstan Trust: caring, collaborative, excellent

**Levels of Trust Governance and Leadership**

| | |
|---|---|
| **Members** | The guardians of governance, Members have a strategic 'eyes on, hands off' role. They have no day-to-day governance or management responsibilities. In summary, Members' key responsibilities include:<br><br>• amending the Articles of Association in agreement with the DfE<br><br>• ensuring the Objects, Purpose and Ethos of the Trust are met<br><br>• instructing the Trust Board by special resolution to take a specific action<br><br>• appointing or removing Members and Member-appointed Trustees<br><br>• appointing the Trust's auditors<br><br>• receiving the audited annual accounts<br><br>• holding the Board of Trustees to account. |
| **Trust Board** | The Trust Board are both Directors under company law and Trustees under charity law. The Board are accountable to the Members, Secretary of State for Education, and the wider community for the quality of the education provided and for the appropriate expenditure of public money. The Board's key responsibilities include:<br><br>• ensuring clarity of vision and ethos and setting the strategic direction<br><br>• overseeing the financial performance of the Trust.<br><br>• holding the executive to account, with systems to assure themselves of the quality, safety and good practice of the affairs of the Trust.<br><br>• holding legal accountability for all aspects of operational delivery<br><br>• approving a written Scheme of Delegation which clarifies roles and responsibilities.<br><br>Trustees have the power to appoint and remove the Chair and Vice-Chair to the Trust Board, the Chief Executive Officer, individuals to serve on Board Committees and co-opted Trustees. They oversee the appointment of co-opted governors. |
| **Board Committees** | There are 4 Board Committees: Audit and Risk, Resources, Staffing and Standards. These have been established to enable review, scrutiny and discussion of key areas and to ensure the Board has sufficient understanding and oversight. Detailed committee roles and memberships are set out in the terms of reference for each committee. |
| **Local Governing Bodies** | The purpose of Local Governing Bodies, as committees of the Trust Board, is to set school level vision and strategy and to assure and promote the quality of experience within each school by supporting and challenging school leaders, engaging with the local community, and reporting on risks, and issues to the Trust Board. Further details about the role of the LGB is set out in the LGB Terms of Reference. |
| **Trust** | The Trust Leadership Team is made up of the Chief Executive Officer (CEO), Chief |

| Leadership Team | Financial Officer (CFO), Estates Director, Finance Director, Director of Learning, IT Manager and HR Manager. The Team is responsible for delivering the educational and operational outcomes for the Trust as set out by the Board. The CEO is the Accounting Officer and has personal responsibility to the DfE. |
|---|---|
| The Headteachers Forum | All school Headteachers are members of this forum. The forum is central to implementation of the strategic plan and a forum to promote collaboration in school improvement. |
| Headteacher | The individual who has responsibility for the performance and defined operational activity areas in a school in line with Trust strategy, approach, ethos and values. |

## The Athelstan Trust Vision

A Trust where schools transform lives by creating opportunity for all, fostering ambition, and enabling every student and colleague to thrive.

## The Athelstan Trust Mission

The Athelstan Trust is a family of schools, rooted in our local communities, committed to:

- Empowering every student and colleague to fulfil their potential through high expectations, opportunity, and care.
- Valuing the distinctive character of each school while recognising that we achieve the most when we work together and support one another.
- Providing an inclusive and transformative education that nurtures talent, inspires ambition, and celebrates diversity.

## The Athelstan Trust Values

**Caring**

We create kind, inclusive communities where everyone feels respected, supported, and valued.

**Collaborative**

We work together across our schools and communities, sharing expertise and supporting one another to achieve more.

**Excellent**

We set high expectations, inspire ambition, and strive for excellence in learning, teaching, and every aspect of school life.

The Athelstan Trust: caring, collaborative, excellent

# Scheme of Delegation

## Key to Delegations

| | |
|---|---|
| **A** | **Accountable** (and approver). Has ultimate accountability ~~responsibility~~ for the task being delivered. May complete the task themselves, or delegate the task to others who are then responsible for its completion. Only one person can be held accountable for each task. A group or individual may be accountable and responsible for a particular task. |
| **R** | **Responsible** for completing the action. |
| **S** | **Support and challenge** to those who are responsible (or accountable) for the task and associated decision making |
| **C** | **Consulted** by those who are accountable and / or responsible. Will be involved before the decision is made: communication is two-way. |
| **I** | **Informed** by those who are accountable and / or responsible. This is likely to be after the decision / task has been completed. |

## 1. Admissions

| | Task | Members | Trust Board | Trust Committee (excl LGB) | CEO | CFO | LGB | Head-teacher |
|---|---|---|---|---|---|---|---|---|
| 1.1 | Provide an education for students wholly and mainly from the area in which the school is situated | | A | | R | | S | R |
| 1.2 | Determine admissions arrangements to include publishing appeals timetable, appeals and decisions | | A | | R | | R | R |
| 1.3 | Implement an admissions policy for each school in accordance with the Admissions Code | | | | R | | S | A |
| 1.4 | Participate in relevant Admissions Forum and have regard to its advice | | | | I | | I | A |
| 1.5 | Participate in the Admissions Fair Access Protocol | | | | I | | I | A |

![The Athelstan Trust logo]

# Scheme of Delegation

## 2. Curriculum

| | Task | Members | Trust Board | Trust Committee | CEO | CFO | LGB | Head-teacher |
|---|---|---|---|---|---|---|---|---|
| 2.1 | Maintain and review curriculum statement to provide a balanced, diverse and broadly based curriculum including provision of RE and careers | | A | S - Standards | R | | | |
| 2.2 | Maintain and review standards of teaching and learning | | A | S -Standards | R | | S | R |
| 2.3 | Monitor student achievement | | A | S - Standards | R | | S | R |
| 2.4 | Make provision for SEND students with or without a statement | | A | S - Standards | R | | S | R |
| 2.5 | Assess students and comply with DFE guidance | | | | A | | S | R |
| 2.6 | Set the times of school sessions, dates of school terms and holidays and ensure each school meets for 190 days (380 sessions) in a school year | | | | A | | C | R |
| 2.7 | Setting and delivering school curriculum and assessment in line with trust approach and the needs of the local community. | | | | C | | S | A |
| 2.8a | Determine a Trust wide written policy on Relationships and Sex Education | | A | | R | | I | C |
| 2.8b | Determine school-based procedures on Relationships and Sex Education | | | | C | | S | A |
| 2.9 | Prohibit political indoctrination and ensure the balanced treatment of political issues | | S | | A | | S | R |
| 2.10a | Determine, review and monitor the Trust SEND Policy, ensuring compliance with the SEND code of practice | | A | | R | | I | C |
| 2.10b | Determine, review and monitor school procedures for SEND, ensuring compliance with the SEND code of practice | | | | I | | S | A |
| 2.11 | Determine whether education of individual students should be delivered by an external provider. | | | | S | | S | A |
| 2.12a | Production of educational data | | | | A | | | R |
| 2.12b | Analysis of educational data in order to determine school improvement priorities and inform school improvement work | | | | I | | | A |
| 2.12c | Analysis of educational data in order to understand educational outcomes for different student groups at the school. | | | | I | | R | A |

| | Task | Members | Trust Board | Trust Committee | CEO | CFO | LGB | Head-teacher |
|---|---|---|---|---|---|---|---|---|
| 2.12d | Analysis of educational data to inform strategy and in order to understand patterns of performance across the Trust | | A | S - Standards | R | | | |
| 2.13 | Delivering the Early Years Foundation Stage (EYFS) in line with statutory requirements | | S | | A | | S | R |
| 2.14 | Delivering Post-16 programme of study in line with statutory requirements | | S | | A | | S | R |

## 3. Finance

| | Task | Members | Trust Board | Trust Committee | CEO | CFO | LGB | Head-teacher |
|---|---|---|---|---|---|---|---|---|
| | Summary of key points only. Detail in Financial Procedures, Administration & Control Policy and ESFA Academy Trust Handbook | | | | | | | |
| 3.1 | Sign off the Annual Accounts and Report | | A | | | | | |
| 3.2 | Determine the Finance Procedures, Administration and Control Policy, including review and recommend levels of delegated authority | | A | S - Resources | | | | |
| 3.3 | Appoint external auditors | A | R | C – Audit & Risk | C | C | | |
| 3.4a | Prepare the budget | | | | A | R | I | C |
| 3.4b | Approve the budget | | A | | | | | |
| 3.4c | Delivery of financial performance in line with budget | | A | C - Resources | R | R | I | R |
| 3.5 | Determine level of school contribution | | A | | R | R | S | C |
| 3.6 | Manage budget at school level | | S | | A | R | I | R |
| 3.7 | Monitor Trust-wide income, expenditure, cash flow and balance sheet | | A | S - Resources | R | R | | I |
| 3.8 | Share monthly management accounts and forecasts with Trustees. | | | S - Resources | R | A | | |
| 3.9 | Ensure compliance with all DfE requirements and inform DfE of any financial irregularities | | A | | R | R | | |
| 3.10 | Set a Charging and Remissions Policy | | A | | R | | I | C |
| 3.11 | Appoint the Internal Auditor | | A | R – Audit & Risk | C | C | | |
| 3.12 | Receive and where appropriate respond to reports from the Auditors | | A | R – Audit & Risk | R | R | I | R |

| | Task | Members | Trust Board | Trust Committee | CEO | CFO | LGB | Head-teacher |
|---|---|---|---|---|---|---|---|---|
| 3.13 | Ensure the Trust is properly audited | | A | R – Audit & Risk | R | R | | |
| 3.14 | Ensure the Trust meets Financial Management Standards and complies with Academy Trust Handbook | | A | R - Resources | R | R | | |
| 3.15 | Establish an appropriate mechanism for the receipt and procurement of donations | | S | | A | R | | R |
| 3.16 | Monitor pupil premium spend, incl year 7 literacy and numeracy catch up and PE and sport premium. | | | | A | R | S | R |
| 3.17 | Review and monitor school level risk assessments | | | | A | | S | R |
| 3.18 | Approve and maintain a register of business interests | | A | | R | R | R | R |

## 4. Governance

| | Task | Members | Trust Board | Trust Committee | CEO | CFO | LGB | Head-teacher |
|---|---|---|---|---|---|---|---|---|
| 4.1 | Determine GDPR and Data Protection Policies | | A | | R | | I | C |
| 4.2 | Determine attendance at Ofsted and other inspections | | C | | A | | I | R |
| 4.3 | Determine Freedom of Information Policy | | A | | R | | I | C |
| 4.4 | Review and approve Business Continuity Plan (including arrangements for cybersecurity and ICT management) | | A | | R | | I | C |
| 4.5 | Determine School arrangements for Business Continuity and Emergency Planning | | | C - Resources | A | | C | R |
| 4.6 | Review and monitor Equality Information and Objectives | | S | | A | | I | R |
| 4.7 | Determine policies to ensure equality, inclusion and diversity | | A | | R | | I | C |
| 4.8 | Determine the Reserved Matters | | A | | | | | |
| 4.9 | Change the name of the Trust or any school | | A | | | | C | |
| 4.10 | Amend the Articles of Association | A | | | | | | |
| 4.11 | Change the Objects | A | | | | | | |

| Ref | Description | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| 4.12 | Determine the educational character, mission or ethos of the schools | | A | | R | | R | C |
| 4.13 | Change the constitution of the Board of Trustees or any terms of reference for any committee | | A | | | | | |
| 4.14 | Establish a trading company | | A | | | | | |
| 4.15 | Sell, purchase, mortgage or charge any land | | A | | | | | |
| 4.16 | Hold AGM | A | | | | | | |
| 4.17 | Maintain records with Companies House as required | | A | | R | | | |
| 4.18 | Propose amendments to Articles/Funding Agreement | | A | | | | | |
| 4.19 | Complying with requirements of the Articles of Association | A | A | | R | R | R | R |
| 4.20 | Approve new schools to join the Trust | | A | | | | | |
| 4.21 | Appoint (and remove) the Chair and Vice chair of the Board | | A | | | | | |
| 4.22 | Appoint (and remove) the Chair and Vice Chair of a local governing body | | A | | C | | C | C |
| 4.23 | Appoint (and remove) co-opted local governors | | A | | C | | R | C |
| 4.24 | Appoint governors to link governor roles (as per the Scheme of Governance). | | | | | | A | |
| 4.25 | Appoint and remove co-opted trustees, with consideration of the skills required across the board | | A | | | | | |
| 4.26 | Appoint a SEND lead Trustee | | A | | | | | |
| 4.27 | Appoint a Careers lead Trustee | | A | | | | | |
| 4.28 | Ensure Trustees have the skills required to fulfil their roles | | A | | | | | |
| 4.29 | Appoint and remove trustees in accordance with Articles of Association | A | | | | | | |
| 4.30 | Appoint, suspend or dismiss the Governance Professional | | A | | R | | | |
| 4.31 | Appoint, suspend or dismiss the Clerk to Governors | | | | | | R | R |
| 4.32 | Annual review of Committee structure, terms of reference, Scheme Delegation and membership | | A | | C | | | |
| 4.33 | Ensure a Trustee and Governor induction programme is in place, to include appointment checks | | A | | S | | I | |
| 4.34 | Agree a policy and protocol for trustee/governor visits to schools | | A | | C | | I | C |
| 4.35 | Appoint advisors and local governor representatives to the committees | | A | | | | | |

| | | Members | Trust Board | Trust Committee | CEO | CFO | LGB | Head-teacher |
|---|---|---|---|---|---|---|---|---|
| 4.36 | Agree Governance Code of Conduct | | A | | | | | |
| 4.37 | Appoint external Governance Reviewer every 3 years | | A | | | | | |
| 4.38 | Determine the members of a parental complaints panel and a behaviour panel | | | | | | A | |

## 5. Planning

| | Task | Members | Trust Board | Trust Committee | CEO | CFO | LGB | Head-teacher |
|---|---|---|---|---|---|---|---|---|
| 5.1 | Agree, approve and champion the Trust Strategic Plan which includes the Trust Vision, culture, and values. | | A | | R | C | C | C |
| 5.2 | Monitor progress against the strategy | | A | R – all committees | | | I | I |
| 5.3 | Agreeing the Trust priorities | | A | | R | | I | C |
| 5.4 | Report on progress against the Strategic Priorities | | I | | A | R | | I |
| 5.5 | Review and maintain a Trust-wide risk management policy and risk register | | A | R - All committees | R | R | C | C |
| 5.6 | Review and maintain a school risk register, reporting significant risks to the Trust Board | | C | | | | A | R |
| 5.7 | Ensure recommendations following an OFSTED inspection are incorporated into the School Improvement Plans | | I | | A | | S | R |
| 5.8 | Agreeing a School vision and strategy which aligns with the Trust strategy and needs of the local community | | I | | C | | A | R |
| 5.9 | Agree priorities for the School Improvement Plans. | | | | A | | S | R |
| 5.10 | Contribute to and approve School Improvement Plan | | | | A | | C | R |
| 5.11 | Monitor School Improvement Plan | | | | A | | R | R |

# Scheme of Delegation

## 6. Premises

| | Task | Members | Trust Board | Trust Committee | CEO | CFO | LGB | Head-teacher |
|---|---|---|---|---|---|---|---|---|
| 6.1 | Develop a Trust buildings strategy (including budgeting for repairs etc.) and Asset Management Planning arrangements | | A | S - Resources | R | R | I | C |
| 6.2 | Procure and agree a maintenance strategy for buildings including developing a properly funded maintenance plan | | I | S - Resources | R | R | I | C |
| 6.3 | Monitor and Review Accessibility Plan | | | | S | | S | A |
| 6.4 | Establish and approve a Health and Safety Policy | | A | S - Resources | R | | I | C |
| 6.5 | Ensure buildings and liability insurances are in place | | | S - Resources | A | | I | I |
| 6.6 | Monitor Health and Safety requirements | | S | S – Resources | A | | S | R |
| 6.7 | Monitor accident book and agree appropriate action | | | | A | | S | R |
| 6.8 | Proactively take responsibility for H&S at schools | | S | S - Resources | A | | S | R |

## 7. Staffing

| | Task | Members | Trust Board | Trust Committee | CEO | CFO | LGB | Head-teacher |
|---|---|---|---|---|---|---|---|---|
| 7.1 | Determine Trust Pay Policy | | A | R – Staffing / Renumeration | R | C | I | C |
| 7.2 | Consider and approve the recommendations of the CEO in respect of pay progression of Headteachers and other senior leaders | | A | R – Staffing / Renumeration | C | C | | |
| 7.3 | Be responsible for levels of pay and conditions of service for all employees, including staff wellbeing | | A | S – Staffing | R | | I | R |
| 7.4 | Consider Trust staffing model and budget | | A | S – Staffing | R | R | | |
| 7.5 | Approve additional executive leadership posts | | A | S – Staffing | R | C | | |
| 7.6 | Determine pay scale of leadership and senior support staff posts | | A | S – Staffing | R | R | | |

| # | Description | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| 7.7 | Keep CEO and CFO pay under review, approve any appointment to the Executive pay scale and ensure compliance with the Executive Pay Policy. | | A | R – Staffing / Renumeration | | C | | | |
| 7.8 | Approve any changes to the Leadership or TLR structure in schools | | | | A | C | | R | |
| 7.9 | Appoint, suspend or dismiss CEO | | A | | | | | | |
| 7.10 | Appoint, suspend or dismiss CFO | | A | | | C | | | |
| 7.11 | Appoint, suspend or dismiss Company Secretary | | A | | | C | C | | |
| 7.12 | Appoint selection panel for CEO or Headteacher recruitment | | A | | | | | | |
| 7.13 | Appoint, suspend or dismiss Headteacher and Deputy Headteacher | | | | A | C | C | | |
| 7.14 | Appoint, suspend or dismiss all other teaching and support staff | | | | | C | C | I | A |
| 7.15 | Appoint staff to school leadership group | | | | | C | C | I | A |
| 7.16 | Appoint, suspend or dismiss non-executive central team staff | | C | | A | | | | |
| 7.17 | Implement staff disciplinary procedures, including dismissal | | | | A | R | | | R |
| 7.18 | Determine disciplinary, capability and grievance procedures | | A | S - Staffing | R | | | | |
| 7.19 | Approve applications for early retirement, secondment and leave of absence for Headteachers and Central team | | I | | A | | | I | |
| 7.20 | Approve applications for early retirement, secondment and leave of absence for School staff | | I | | | C | | I | A |
| 7.21 | Determine a performance management policy | | A | S - Staffing | R | | | | C |
| 7.22 | Implement the performance management of school staff | | | | | | | | A |
| 7.23 | Implement the performance management of Headteachers | | | | A | | C | | |
| 7.24 | Implement the performance management of CEO | | A | R - Staffing / Renumeration | | | | | |
| 7.25 | Implement the performance management of Central team | | | | A | R | | | |
| 7.26 | Agree and monitor a staff development strategy for teachers, support staff and central team | | | S - Staffing | A | | | I | R |
| 7.27 | Hold Pay Panels to review teacher pay progression | | | | | | | R | A |
| 7.28 | Hear appeals of decisions on pay progression | | A | S - Staffing | | | | | |
| 7.29 | Determine statement for dealing with allegations of abuse against staff | | A | S - Staffing | R | | | I | |
| 7.30 | Determine other Trust HR Policies | | A | S - Staffing | R | | | | |

# Scheme of Delegation

## 8. Stakeholder Engagement

| | Task | Members | Trust Board | Trust Committee | CEO | CFO | LGB | Head-teacher |
|---|---|---|---|---|---|---|---|---|
| 8.1 | Ensure the schools share facilities with other schools and the wider community and promote community cohesion | | | | S | | R | A |
| 8.2 | Ensure schools publish all information as required on its website | | | | S | | S | A |
| 8.3a | Determine the Trust Complaints Policy | | A | | R | | I | C |
| 8.4b | Adopt and follow the Trust Complaints Policy | | | | S | | A | R |
| 8.4 | Engaging with Parents | | | | S | | S | A |

## 9. Student Welfare

| | Task | Members | Trust Board | Trust Committee | CEO | CFO | LGB | Head-teacher |
|---|---|---|---|---|---|---|---|---|
| 9.1a | Determine the Trust behaviour policy | | A | S - Standards | R | | I | C |
| 9.1b | Determine the School Behaviour Procedures | | | | S | | S | A |
| 9.2 | Determine the Trust exclusion policy | | A | | R | | I | C |
| 9.3 | Suspend a student for one or more fixed terms (not exceeding 45 days in total in a year) or exclude permanently | | | | S | | | A |
| 9.4 | Review the use of suspensions (formerly known as fixed term exclusions) and to decide whether or not to confirm all permanent exclusions (and fixed term suspensions where necessary) | | | | | | C | A |
| 9.5 | Direct reinstatement of suspended students | | | | I | | A | |
| 9.6a | Review the overall pattern and use of suspensions and exclusions across the Trust | | A | R - Standards | C | | I | |
| 9.6b | Review the overall pattern and use of suspensions and exclusions within the school | | | | C | | C | R |
| 9.7 | Monitor and review trends in student attendance | | A | R - Standards | R | | S | R |
| 9.8 | Maintain register of student attendance | | | | | | | A |

| Ref | Description | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| 9.9 | Provide meals to pupils under the Universal Free School Meals programme and to pupils who qualify for Free School Meals. | | | | | | | S | A |
| 9.10 | Ensure the schools have appointed a designated teacher to support looked after and previously looked after children | | | | A | | S | R |
| 9.11 | Ensure school procedures for Looked After Children are consistent with measures set out in the statutory guidance | | | | | | S | A |
| 9.12 | Appoint a designated trustee and governors for Safeguarding children | | A | | | | R | |
| 9.13 | Annually review the Safeguarding and Child Protection policy (including cybersecurity) and procedures and Whistleblowing Policy | | A | | R | | C | C |
| 9.14 | Ensuring that schools appoint a Designated Safeguarding Lead | | | | A | | I | R |
| 9.15 | Maintain a Single Central Record at each school, carrying out DBS checks as appropriate. | | | | A | | S | R |
| 9.16 | Setting the school uniform policy | | | | | | C | A |