



## Trust Delegation Planner

The Trust is accountable in law for all major decisions about the school and its future. However, this does not mean that they are required to carry out all the work themselves. Very many of the tasks can and should be delegated to individuals and committees. It is vital that the decision to delegate a task/responsibility to an individual is made by the board of trustees and recorded.

The table below sets out the major areas of responsibility for the board of trustees and to whom they can delegate each task.

**This planner shows to which level the board of trustees may legally delegate functions.**

- The board of trustees are responsible for the strategic direction of the school
- The head and staff play the major role in formulating plans, policies and targets to bring to the board of trustees for discussion prior to adoption.
- The head is responsible for internal organisation, management and control of the school and is accountable to the board of trustees.
- Although decisions may be delegated, the board of trustees remain responsible for any decision made under delegation.

Area	Function	In our school, this responsibility is delegated to:
Budgets	To approve the first formal budget plan each financial year (and depends on your local scheme of financial delegation)	<b>Trustees</b>
	To monitor monthly expenditure.	<b>Trustees</b>
	To establish a charging and remissions policy	<b>Trustees</b>
	To enter into contracts (GB should agree financial limits)	<b>Trustees</b>
Staffing	Appoint selection panel for headteacher	<b>Trustees</b>
	Appoint selection panel for deputy head	<b>Trustees</b>
	Appoint selection panel for other members of the senior leadership team	<b>Head and Chair</b>

	Appoint other teachers	<b>Head</b>
	Appoint non-teaching staff	<b>Head and Business Manager</b>
	To put in place a pay policy	<b>Trustees</b>
	To decide upon pay discretions in line with the pay policy and legal requirements.(1)	<b>Head and Business Manager</b>
	Dismissal of headteacher	<b>Chair</b>
	Initial dismissal of other staff	<b>Head</b>
	Suspending head	<b>Chair</b>
	Suspending staff (except head)	<b>Head</b>
	Ending suspension (head)	<b>Chair</b>
	Ending suspension (except head)	<b>Head</b>
	Setting the overall staffing structure	<b>Head</b>
	In voluntary and foundation schools to agree whether or not the Chief Education Officer/diocesan authority should have advisory rights	<b>N/A</b>
	Determining dismissal payments/ early retirement	<b>Head and Chair</b>
	To produce and maintain a central record of recruitment and vetting checks	<b>Head and HR Admin (PA)</b>
	Establish and review procedures for addressing staff discipline, conduct and grievance.	<b>Trustees</b>
<b>Area</b>	<b>Function</b>	<b>In our school, this responsibility is delegated to:</b>
<b>Curriculum</b>	Ensure National Curriculum (NC) taught to all pupils.	<b>Trustees</b>
	To consider any disapplication for pupil(s)	<b>Head</b>
	To decide which subject options should be taught having regard to resources, and implement provision for flexibility in the curriculum (including activities outside school day)	<b>Head</b>
	Establish and review a sex education policy (including in primary schools where the GB must decide whether to teach sex education) and ensure that parents are informed of their right to withdraw their children.	<b>Head</b>

<b>Religious Education</b>	Responsibility for ensuring that provision of RE meets statutory requirements and /or the requirements of any trust deed.	<b>Head</b>
<b>Collective Worship</b>	To ensure that all students take part in a daily act of collective worship in line with statutory	<b>Head</b>
<b>Extra-Curricular Provision</b>	To decide whether to offer additional activities and what form these should take	<b>Head</b>
	To put into place the additional services provided	<b>Head</b>
	To decide whether to stop providing additional activities.	<b>Head</b>
<b>Performance management</b>	To formulate and review teacher appraisal policy	<b>Trustees</b>
	To appoint the panel to carry out the appraisal of the head teacher.	<b>Trustees / Chair</b>
	To carry out appraisal of other teachers.	<b>Head</b>
<b>Discipline/ exclusions</b>	To produce a set of written principles for the school behaviour policy and present these to the headteacher, parents, staff and students for consultation.	<b>Trustees</b>
	To draft the content of the school behaviour policy and publicise it to staff, students and parents.	<b>Head</b>
	To review the use of exclusion and to decide whether or not to confirm all permanent exclusions and fixed term exclusions where the pupil is either excluded for more than 15 days in total in a term or would lose the opportunity to sit a public examination. (Can be delegated to chair/vice-chair in cases of urgency)	<b>Disciplinary Committee</b>
<b>Admissions</b>	To consult annually before setting an admissions policy (VA and foundation schools)	<b>Trustees</b>
	Admissions: application decisions (VA, foundation and special schools)	<b>N/A</b>
	To appeal against LA directions to admit pupil(s) (voluntary, foundation and special schools; also community and VC schools where LA is the admissions authority)	<b>N/A</b>

<b>Premises &amp; insurance</b>	Buildings insurance and personal liability– GB to seek advice from LA, diocese or trustees where appropriate.	<b>Trustees</b>
<b>Health &amp; safety</b>	To ensure a health and safety policy and procedures are in place.	<b>Trustees</b>
	To ensure that health and safety regulations are followed	<b>Trustees</b>
<b>School organisation</b>	To publish proposals to change category of school	<b>Trustees</b>
	To decide whether to convert status (2)	<b>Trustees</b>
	Propose to alter or discontinue voluntary foundation or foundation special school	<b>N/A</b>
	To set the times of school sessions and the dates of school terms and holidays (except in community, special and VC schools where this is the LA's role)	<b>Trustees</b>
	To ensure that school food regulations are met	<b>Trustees</b>
	To ensure provision of free meals to those pupils meeting the criteria, including Universal Infant Free School Meals (if applicable)	<b>Head &amp; Business Manager</b>
	To establish a data protection policy and review it at least every two years.	<b>Trustees</b>
	To ensure that a register of pupil attendance is maintained.	<b>Trustees</b>
<b>Information for parents</b>	Adopt and review the home-school agreement	<b>Trustees</b>
	Establish, publish and review a complaints procedure.	<b>Trustees</b>
	To establish and publish a Freedom of Information scheme and ensure the school complies with it.	<b>Trustees</b>
<b>Area</b>	<b>Function</b>	<b>In our school, this responsibility is delegated to:</b>
<b>GB procedures</b>	To draw up an instrument of government and any amendments thereafter	<b>Trustees</b>
	To appoint (and remove) the chair and vice-chair of a permanent or a temporary governing body	<b>Trustees</b>

	To appoint and dismiss the clerk	<b>Trustees</b>
	To appoint and remove community or sponsor governors (if constituted under 2007 regulations) or co-opted governors (if constituted under 2012 regulations).	<b>Trustees</b>
	To set up a register of governors' business interests	<b>Clerk</b>
	To approve and set up a governors expenses scheme	<b>Trustees</b>
	To consider whether or not to exercise delegation of functions to individuals or committees.	<b>Trustees</b>
	To regulate the GB procedures (where not set out in law)	<b>Trustees</b>
<b>Federations</b>	To consider forming a federation or joining an existing federation	<b>Trustees</b>
	To consider requests from other schools to join the federation	<b>Trustees</b>
	To leave a federation	<b>Trustees</b>
<b>Inclusion and equality</b>	To establish and review a special educational needs (SEN) policy.	<b>Trustees</b>
	To establish and publish annually an 'Equality information and objectives statement', and review equality objectives every four years.	<b>Trustees</b>
	To designate a "responsible person" for children with SEN in community, voluntary and foundation schools	<b>Head</b>
	To designate a "responsible person" for looked after children in community, voluntary and foundation schools	<b>Head</b>
	To establish an accessibility plan and review it every three years.	<b>Head</b>
	To establish and review annually a child protection policy and relevant procedures.	<b>Trustees</b>