Sand Academies Trust

Scheme of Delegation Decision Matrix

Date	Author	Status	Next Step
5 April 2019	S Harvey	Draft version 3 for	Final version
		Trustees final	and
		comments	Implementation
9 August 2019	S Harvey	Operational version	
		issue 1	

SAND Academies TRUST

SCHEME OF DELEGATION

Introduction

This Scheme of Delegation sets out the delegated powers between the MAT Board, the Audit Committee and Local Advisory Boards (LABs) within SAND Academies Trust.

The delegated powers are broken down into different levels in line with the Trust's principles of governance, leadership and operation. The delegated autonomy for individual academies is aligned with the need for the Trust to fulfil its corporate responsibilities and accountabilities to the Department for Education, Education Funding Agency, Charities Commission, HMRC and Companies House.

The different levels of delegated power are listed below but it should be noted that not every task requires all levels of delegated power to be defined:

- Approve (A)
- Recommend (R) (Extensive feasibility study, internal consultation and expert view have been consulted prior to recommendation)
- Consult (C)
- Implement (I)

The Scheme of Delegation should be read in conjunction with the Terms of Reference for the relevant body.

Trust Policies

A key task for the Trust is to develop and monitor a range of policies that constituent academies are required to adopt. These policies are listed in section 2.

Where an Academy Principal seeks any local adjustment to a Trust policy, they will agree any change necessary with their Local Governing Board prior to seeking Trust approval of the variance. Until that Trust approval is gained the Trust policy remains fully in force.

#	Task	Notes						
	Key: Approve (A), Recommend (R)		<u></u> 요	-			9	oal
	Propose (P), Consulted (C), Implement		Clerk to	Exec .	MATB	Chief	В В	Principal
	(1)		5	Ä	Σ	පි :	LAB	Pri
1.	Governance							
1.1.	Approve Trust Articles of Association	Members only			Α			
1.2.	Approve Trust Board Terms of				Α			
	Reference							
1.3.	Approve Trust Scheme of Delegation				Α		С	
1.4.	Approve new academies joining the Trust			R	Α			
1.5.	Approve Local Governing Body (LAB) Terms of Reference		R		Α			
1.6.	Establish LAB working groups						Α	R
1.7.	Appoint Chair of Trust Board	As per Articles			Α			
1.8.	Appoint (and remove) Chair of LAB	As per Articles			Α			
1.9.	Appoint (and remove) Vice Chair of	As per LAB					Α	
	LAB	ToRs						
	Appoint Audit Committee				Α	R		
1.11	Appoint (and remove) Clerk to Trust Board				Α			
1.12	Appoint (and remove) Clerk to LAB						Α	
	Organise calendar of Trust Board and		R		Α			
	LAB meetings							
1.14	Approve Directors Expenses Policy				Α	R		
2.	Trust Policies and procedures							
2.1.	Academy times, terms and holidays				Α		R	R
2.2.	Expansion of Academy (PAN)						I -	R
					Α		R	_
2.3.	Change of age range				A		R	R
2.3.	Change of age range Extension of Academy provision							
2.4.	Change of age range Extension of Academy provision (Nursery)				A		R R	R R
2.4.	Change of age range Extension of Academy provision (Nursery) Child Welfare & Safeguarding Policy			R	A A A		R R R	R R R
2.4. 2.5. 2.6.	Change of age range Extension of Academy provision (Nursery) Child Welfare & Safeguarding Policy Attendance Policy			R	A A A		R R R	R R R
2.4. 2.5. 2.6. 2.7.	Change of age range Extension of Academy provision (Nursery) Child Welfare & Safeguarding Policy Attendance Policy Pupil Behaviour & Exclusions Policy			R R	A A A A		R R R	R R R R
2.4. 2.5. 2.6. 2.7. 2.8.	Change of age range Extension of Academy provision (Nursery) Child Welfare & Safeguarding Policy Attendance Policy Pupil Behaviour & Exclusions Policy Health and Safety			R R R	A A A A A		R R R R	R R R R R
2.4. 2.5. 2.6. 2.7. 2.8. 2.9.	Change of age range Extension of Academy provision (Nursery) Child Welfare & Safeguarding Policy Attendance Policy Pupil Behaviour & Exclusions Policy Health and Safety Complaints Policy			R R R	A A A A A A		R R R R R	R R R R C C
2.4. 2.5. 2.6. 2.7. 2.8. 2.9. 2.10	Change of age range Extension of Academy provision (Nursery) Child Welfare & Safeguarding Policy Attendance Policy Pupil Behaviour & Exclusions Policy Health and Safety Complaints Policy Complaints Appeals			R R R R	A A A A A A		R R R R	R R R R C C
2.4. 2.5. 2.6. 2.7. 2.8. 2.9.	Change of age range Extension of Academy provision (Nursery) Child Welfare & Safeguarding Policy Attendance Policy Pupil Behaviour & Exclusions Policy Health and Safety Complaints Policy Complaints Appeals Academy Trips Policy with local			R R R	A A A A A A		R R R R R	R R R R C C
2.4. 2.5. 2.6. 2.7. 2.8. 2.9. 2.10 2.11	Change of age range Extension of Academy provision (Nursery) Child Welfare & Safeguarding Policy Attendance Policy Pupil Behaviour & Exclusions Policy Health and Safety Complaints Policy Complaints Appeals Academy Trips Policy with local appendix?			R R R R R	A A A A A A		R R R R R	R R R R C C
2.4. 2.5. 2.6. 2.7. 2.8. 2.9. 2.10 2.11	Change of age range Extension of Academy provision (Nursery) Child Welfare & Safeguarding Policy Attendance Policy Pupil Behaviour & Exclusions Policy Health and Safety Complaints Policy Complaints Appeals Academy Trips Policy with local appendix? Assessment Policy			R R R R	A A A A A A		R R R R R	R R R R C C
2.4. 2.5. 2.6. 2.7. 2.8. 2.9. 2.10 2.11 2.12 2.13	Change of age range Extension of Academy provision (Nursery) Child Welfare & Safeguarding Policy Attendance Policy Pupil Behaviour & Exclusions Policy Health and Safety Complaints Policy Complaints Appeals Academy Trips Policy with local appendix? Assessment Policy Complaints Policy			R R R R R	A A A A A A		R R R R R	R R R R C C C
2.4. 2.5. 2.6. 2.7. 2.8. 2.9. 2.10 2.11 2.12 2.13 2.14	Change of age range Extension of Academy provision (Nursery) Child Welfare & Safeguarding Policy Attendance Policy Pupil Behaviour & Exclusions Policy Health and Safety Complaints Policy Complaints Appeals Academy Trips Policy with local appendix? Assessment Policy			R R R R R R	A A A A A A A		R R R R R	R R R R C C C
2.4. 2.5. 2.6. 2.7. 2.8. 2.9. 2.10 2.11 2.12 2.13 2.14 2.15	Change of age range Extension of Academy provision (Nursery) Child Welfare & Safeguarding Policy Attendance Policy Pupil Behaviour & Exclusions Policy Health and Safety Complaints Policy Complaints Appeals Academy Trips Policy with local appendix? Assessment Policy Complaints Policy Data Protection Policy			R R R R R R	A A A A A A A		R R R R R	R R R R C C C R
2.4. 2.5. 2.6. 2.7. 2.8. 2.9. 2.10 2.11 2.12 2.13 2.14 2.15	Change of age range Extension of Academy provision (Nursery) Child Welfare & Safeguarding Policy Attendance Policy Pupil Behaviour & Exclusions Policy Health and Safety Complaints Policy Complaints Appeals Academy Trips Policy with local appendix? Assessment Policy Complaints Policy Equality and Diversity Policy Health and Safety Policy			R R R R R R	A A A A A A A A A A A A A A A A A A A		R R R R C C	R R R R C C C R R
2.4. 2.5. 2.6. 2.7. 2.8. 2.9. 2.10 2.11 2.12 2.13 2.14 2.15 2.16 2.17	Change of age range Extension of Academy provision (Nursery) Child Welfare & Safeguarding Policy Attendance Policy Pupil Behaviour & Exclusions Policy Health and Safety Complaints Policy Complaints Appeals Academy Trips Policy with local appendix? Assessment Policy Complaints Policy Equality and Diversity Policy Health and Safety Policy			R R R R R R R R	A A A A A A A		R R R R C C	R R R R C C C R R R C
2.4. 2.5. 2.6. 2.7. 2.8. 2.9. 2.10 2.11 2.12 2.13 2.14 2.15 2.16 2.17 2.18 2.19	Change of age range Extension of Academy provision (Nursery) Child Welfare & Safeguarding Policy Attendance Policy Pupil Behaviour & Exclusions Policy Health and Safety Complaints Policy Complaints Appeals Academy Trips Policy with local appendix? Assessment Policy Complaints Policy Equality and Diversity Policy Health and Safety Policy Internal Verification Policy			R R R R R R R R	A A A A A A A A A A		R R R R C C	R R R R C C C R R R

	Task	Notes						
	Variable (A) Danaman d (D)		0	-				al
	Key: Approve (A), Recommend (R) Propose (P), Consulted (C), Implement		Clerk to	<u>؟</u> ي	MATB	ef	~	Principal
	(I)		Cle	Exec	È	Chief	LAB	Pri
2.21	Exam Contingency Policy			R	Α			I
2.22	Anti-bullying			R	Α			I
2.23	Deprivation of Liberty Safeguards			R	Α			I
2.24	Safeguarding and Protection of			R	Α		С	С
	Vulnerable Adults							
2.25	DBS renewal		Ι	R	Α			1
2.26	Recruitment & Selection			R	Α			
2.27	Anti-fraud			R	Α			
2.28	Ethical purchasing & donations			R	Α			
2.29	Procurement policy			R	Α			
2.30	Asset Management Policy			R	Α	1		
2.31	Investment				Α	RI		
2.32	Reserves				Α	RI		
2.33	Risk Management Policy			R	Α			
2.34	Drugs Policy							
2.35	Appropriate use of IT and Email Policy							
	- Staff							
2.36	Appropriate use of IT and Email by							
	students							
2.37	,							
3.	Staff Policies and Pay							
3.1.	Pay & Remuneration Policy			R	A			С
3.1. 3.2.	Pay & Remuneration Policy Job Role Salary & Grading Policy			R	A A			С
3.1.	Pay & Remuneration Policy Job Role Salary & Grading Policy Changes to Employee Terms &							
3.1. 3.2. 3.3.	Pay & Remuneration Policy Job Role Salary & Grading Policy Changes to Employee Terms & Conditions or Collective Agreements			R R	A A			C C
3.1. 3.2. 3.3.	Pay & Remuneration Policy Job Role Salary & Grading Policy Changes to Employee Terms & Conditions or Collective Agreements Teachers Annual Pay Award			R R R	A A A			С
3.1. 3.2. 3.3.	Pay & Remuneration Policy Job Role Salary & Grading Policy Changes to Employee Terms & Conditions or Collective Agreements Teachers Annual Pay Award Academy Principal's Annual Pay			R R	A A		R	C C
3.1. 3.2. 3.3. 3.4. 3.5.	Pay & Remuneration Policy Job Role Salary & Grading Policy Changes to Employee Terms & Conditions or Collective Agreements Teachers Annual Pay Award Academy Principal's Annual Pay Award			R R R	A A A		R	C C R
3.1. 3.2. 3.3. 3.4. 3.5.	Pay & Remuneration Policy Job Role Salary & Grading Policy Changes to Employee Terms & Conditions or Collective Agreements Teachers Annual Pay Award Academy Principal's Annual Pay Award Support Staff Annual Pay Award			R R R	A A A A		R	C C R
3.1. 3.2. 3.3. 3.4. 3.5.	Pay & Remuneration Policy Job Role Salary & Grading Policy Changes to Employee Terms & Conditions or Collective Agreements Teachers Annual Pay Award Academy Principal's Annual Pay Award Support Staff Annual Pay Award Performance Management &			R R R	A A A		R	C C R
3.1. 3.2. 3.3. 3.4. 3.5. 3.6. 3.7.	Pay & Remuneration Policy Job Role Salary & Grading Policy Changes to Employee Terms & Conditions or Collective Agreements Teachers Annual Pay Award Academy Principal's Annual Pay Award Support Staff Annual Pay Award Performance Management & Appraisal Review Policy			R R R R	A A A A		R	C C R R
3.1. 3.2. 3.3. 3.4. 3.5. 3.6. 3.7.	Pay & Remuneration Policy Job Role Salary & Grading Policy Changes to Employee Terms & Conditions or Collective Agreements Teachers Annual Pay Award Academy Principal's Annual Pay Award Support Staff Annual Pay Award Performance Management & Appraisal Review Policy Disciplinary Policy			R R R R	A A A A A		R	C C R R C C C
3.1. 3.2. 3.3. 3.4. 3.5. 3.6. 3.7.	Pay & Remuneration Policy Job Role Salary & Grading Policy Changes to Employee Terms & Conditions or Collective Agreements Teachers Annual Pay Award Academy Principal's Annual Pay Award Support Staff Annual Pay Award Performance Management & Appraisal Review Policy Disciplinary Policy Grievance Policy			R R R R	A A A A A A		R	C C R R C C C C
3.1. 3.2. 3.3. 3.4. 3.5. 3.6. 3.7. 3.8. 3.9. 3.10	Pay & Remuneration Policy Job Role Salary & Grading Policy Changes to Employee Terms & Conditions or Collective Agreements Teachers Annual Pay Award Academy Principal's Annual Pay Award Support Staff Annual Pay Award Performance Management & Appraisal Review Policy Disciplinary Policy Grievance Policy Capability Policy			R R R R R R	A A A A A A		R	C C R R C C C C C
3.1. 3.2. 3.3. 3.4. 3.5. 3.6. 3.7. 3.8. 3.9. 3.10 3.11	Pay & Remuneration Policy Job Role Salary & Grading Policy Changes to Employee Terms & Conditions or Collective Agreements Teachers Annual Pay Award Academy Principal's Annual Pay Award Support Staff Annual Pay Award Performance Management & Appraisal Review Policy Disciplinary Policy Grievance Policy Capability Policy Whistleblowing Policy			R R R R R R R	A A A A A A A		R	C C R R C C C C C C C
3.1. 3.2. 3.3. 3.4. 3.5. 3.6. 3.7. 3.8. 3.9. 3.10 3.11 3.12	Pay & Remuneration Policy Job Role Salary & Grading Policy Changes to Employee Terms & Conditions or Collective Agreements Teachers Annual Pay Award Academy Principal's Annual Pay Award Support Staff Annual Pay Award Performance Management & Appraisal Review Policy Disciplinary Policy Grievance Policy Capability Policy Whistleblowing Policy Re-structuring & Redundancy Policy			R R R R R R R R R R R	A A A A A A		R	C C R R C C C C C C C C C
3.1. 3.2. 3.3. 3.4. 3.5. 3.6. 3.7. 3.8. 3.9. 3.10 3.11 3.12 3.13	Pay & Remuneration Policy Job Role Salary & Grading Policy Changes to Employee Terms & Conditions or Collective Agreements Teachers Annual Pay Award Academy Principal's Annual Pay Award Support Staff Annual Pay Award Performance Management & Appraisal Review Policy Disciplinary Policy Grievance Policy Capability Policy Whistleblowing Policy Re-structuring & Redundancy Policy Employee Health & Safety Policy			R R R R R R R	A A A A A A A		R	C C R R C C C C C C C
3.1. 3.2. 3.3. 3.4. 3.5. 3.6. 3.7. 3.8. 3.9. 3.10 3.11 3.12 3.13 4.	Pay & Remuneration Policy Job Role Salary & Grading Policy Changes to Employee Terms & Conditions or Collective Agreements Teachers Annual Pay Award Academy Principal's Annual Pay Award Support Staff Annual Pay Award Performance Management & Appraisal Review Policy Disciplinary Policy Grievance Policy Capability Policy Whistleblowing Policy Re-structuring & Redundancy Policy Employee Health & Safety Policy Staff Management			R R R R R R R R R R R R	A A A A A A			C C C C C C C C C
3.1. 3.2. 3.3. 3.4. 3.5. 3.6. 3.7. 3.8. 3.9. 3.10 3.11 3.12 3.13 4.	Pay & Remuneration Policy Job Role Salary & Grading Policy Changes to Employee Terms & Conditions or Collective Agreements Teachers Annual Pay Award Academy Principal's Annual Pay Award Support Staff Annual Pay Award Performance Management & Appraisal Review Policy Disciplinary Policy Grievance Policy Capability Policy Whistleblowing Policy Re-structuring & Redundancy Policy Employee Health & Safety Policy Staff Management Trust pay structure			R R R R R R R R R R R R	A A A A A A A A A		C	C C R R C C C C C C C C C C C C
3.1. 3.2. 3.3. 3.4. 3.5. 3.6. 3.7. 3.8. 3.9. 3.10 3.11 3.12 3.13 4. 4.1. 4.2.	Pay & Remuneration Policy Job Role Salary & Grading Policy Changes to Employee Terms & Conditions or Collective Agreements Teachers Annual Pay Award Academy Principal's Annual Pay Award Support Staff Annual Pay Award Performance Management & Appraisal Review Policy Disciplinary Policy Grievance Policy Capability Policy Whistleblowing Policy Re-structuring & Redundancy Policy Employee Health & Safety Policy Staff Management Trust pay structure Individual staff pay point			R R R R R R R R R R R R C	A A A A A A A A A		C R	C C C C C C C C C
3.1. 3.2. 3.3. 3.4. 3.5. 3.6. 3.7. 3.8. 3.9. 3.10 3.11 3.12 3.13 4. 4.1. 4.2. 4.3.	Pay & Remuneration Policy Job Role Salary & Grading Policy Changes to Employee Terms & Conditions or Collective Agreements Teachers Annual Pay Award Academy Principal's Annual Pay Award Support Staff Annual Pay Award Performance Management & Appraisal Review Policy Disciplinary Policy Grievance Policy Capability Policy Whistleblowing Policy Re-structuring & Redundancy Policy Employee Health & Safety Policy Staff Management Trust pay structure Individual staff pay point Principal appointment			R R R R R R R R R C C	A A A A A A A A A A A A A A A A A A A		C R C	C C C C C C C C C C
3.1. 3.2. 3.3. 3.4. 3.5. 3.6. 3.7. 3.8. 3.9. 3.10 3.11 3.12 3.13 4. 4.1. 4.2.	Pay & Remuneration Policy Job Role Salary & Grading Policy Changes to Employee Terms & Conditions or Collective Agreements Teachers Annual Pay Award Academy Principal's Annual Pay Award Support Staff Annual Pay Award Performance Management & Appraisal Review Policy Disciplinary Policy Grievance Policy Capability Policy Whistleblowing Policy Re-structuring & Redundancy Policy Employee Health & Safety Policy Staff Management Trust pay structure Individual staff pay point			R R R R R R R R R R R R C	A A A A A A A A A		C R	C C R R C C C C C C C C C C C C

#	Task	Notes						
				-				
	Key: Approve (A), Recommend (R)		Clerk to	2	TB) ب ب		Principal
	Propose (P), Consulted (C), Implement		lerl	xec	MATB	Chief	LAB	rin
			0	ш				
4.6.	Teaching and support staff							Α
	appointments			_	_			
4.7.	Suspension of Principal			R	Α		С	
4.8.	Return of Principal after suspension			С	Α		С	
4.9.	Dismissal of Principal	553.4			Α .		R	
4.10	1	EPM			I			
4.11	•							Α
4.12	Return of Vice Principal after suspension							A
4.13	Suspension of teaching and support							Α
20	staff							, ,
4.14	Return of teaching and support staff							Α
	after suspension							
4.15	Dismissal of Vice Principal or teaching							Α
	and support staff							
4.16	Appeal of staff other than Principal						1	
	against dismissal							
5.	Financial Governance & Management						ı	
5.1.	Trust & Academy Financial			С	Α	R		С
	Regulations (inc. key policies)							
5.2.	Trust & Academy Financial Procedures			С	Α	R		С
5.3.	Trust Procurement Policy			С	Α	R		С
5.4.	Trust 3 year Budget Plan			С	Α	R		
5.5.	Trust 1 year Budget			С	Α	R		
5.6.	Trust Consolidated Budget Updates			С	Α	R		
5.7.	Trust Consolidated Financial			С	Α	R		
	Statements							
5.8.	Trustees Report			С	Α	R		
5.9.	Trust Academies Accounts Return to EFA			С	Α	R		
5.10	Response to Auditor's Management			С	Α	R		
3.10	Letter					``		
5.11	Academy 3 year Budget Plan			С	Α	С	R	R
5.12				С	Α	С	R	R
5.13	Academy Budget Updates			С	Α	I	R	С
5.14	· · · · · · · · · · · · · · · · · · ·			С		Α	PR	С
_						& I		
6.	Financial Authorisation			T	T	1	ı	I
6.1.	Expenditure or contracts up to limit in			С	Α	С		R
	Scheme of Delegation (over £100,000)							
6.2.	Expenditure or contracts from limit to			С	Α	С	R	
	LAB limit (c.f. Finance Regulations)							
6.3.	Expenditure or contracts from LAB			С	Α	С		
	Limit to OJEU limit							

Rey: Approve (A), Recommend (R) Propose (P), Consulted (C), Implement (I) Recommend (R)	#	Task	Notes						
6.4. Expenditure over OJEU limit 6.5. Disposals or write off of stock, assets or debts up to Principal Limit (£500) 6.6. Disposals or write off of stock, assets or debts from Principal Limit to LAB Limit (£1000) 6.7. Disposals or write off of stock, assets or debts from Principal Limit to LAB Limit (£1000) 6.8. Disposals or write off of stock, assets or debts from LAB Limit up to AFH limit (±£50,000) 6.8. Settlements/Compensation payments up to £50,000 (AFH Limit) 6.9. Settlements/Compensation payments over £50,000 7. Academy Policies & Procedures, Curriculum and Teaching 7.1. Academy Performance Targets 7.2. Academy Performance Review e.g. SEF 7.3. Academy 9 ayear plan 7.4. Academy 1 year development Plan 7.5. Curriculum Policy 7.6. Teaching & Learning Policy 7.7. Sex Education policy 7.8. Religious Education policy 7.9. Fixed term Exclusion 7.10 Permanent Exclusion 7.11 Appeals against Permanent Exclusion 7.12 Academy Trips 7.13 Admissions Policy 7.14 Allocation of places against Admissions Policy 7.15 Admissions Policy 7.16 Academy prospectus 7.17 Academy prospectus 7.18 Academy prospectus 7.19 Academy website 7.10 Pupil Premium – Report and Action Plan 7.21 Asset Management Policy & Plan 7.22 Health & Safety Policy & Plan 7.23 Re R R R R R R R R R R R R R R R R R R		Key: Annroye (A) Recommend (B)		0.	-	~	ļ		oal
6.4. Expenditure over OJEU limit 6.5. Disposals or write off of stock, assets or debts up to Principal Limit (£500) 6.6. Disposals or write off of stock, assets or debts from Principal Limit to LAB Limit (£1000) 6.7. Disposals or write off of stock, assets or debts from Principal Limit to LAB Limit (£1000) 6.8. Disposals or write off of stock, assets or debts from LAB Limit up to AFH limit (±£50,000) 6.8. Settlements/Compensation payments up to £50,000 (AFH Limit) 6.9. Settlements/Compensation payments over £50,000 7. Academy Policies & Procedures, Curriculum and Teaching 7.1. Academy Performance Targets 7.2. Academy Performance Review e.g. SEF 7.3. Academy 9 ayear plan 7.4. Academy 1 year development Plan 7.5. Curriculum Policy 7.6. Teaching & Learning Policy 7.7. Sex Education policy 7.8. Religious Education policy 7.9. Fixed term Exclusion 7.10 Permanent Exclusion 7.11 Appeals against Permanent Exclusion 7.12 Academy Trips 7.13 Admissions Policy 7.14 Allocation of places against Admissions Policy 7.15 Admissions Policy 7.16 Academy prospectus 7.17 Academy prospectus 7.18 Academy prospectus 7.19 Academy website 7.10 Pupil Premium – Report and Action Plan 7.21 Asset Management Policy & Plan 7.22 Health & Safety Policy & Plan 7.23 Re R R R R R R R R R R R R R R R R R R				irk 1	9C	ATE	ief	a	ncil
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AFH = Academies Financial Handbook

OJEU = Official Journal of the European Union (previously called OJEC – the Official Journal of the European Community.

Approved: May 2019