

	Board of Trustees non-delegated responsibilities	Responsibilities delegated by the Board to the Central Executive Team (CE)	Responsibilities delegated by the Board to principals and headteachers	Responsibilities delegated by the Board to the Local Governing Body (LGB)
	Level of responsibility: strategic <ul style="list-style-type: none"> ✓ to set, agree and challenge Trust-wide strategies ✓ to be legally responsible for all CfBT Schools Trust (CST) schools ✓ ensure money is well spent 	Level of responsibility: executive <ul style="list-style-type: none"> ✓ to lead, deliver, monitor and challenge implementation of Trust strategy throughout CST ✓ to recommend strategic decisions to trustees ✓ oversee the education and financial performance of the school ✓ ensure money is well spent 	Level of responsibility: operational with strategic management at local level within the overall CST strategy <ul style="list-style-type: none"> ✓ to lead, manage, drive and deliver the implementation of CST and in-school strategies within their school ✓ to make strategic decisions at school level ✓ lead on the educational and financial performance of the school ✓ ensure money is well spent 	Level of responsibility: accountable to the Board with specific delegation for strategy, monitoring, oversight and challenge within their school <ul style="list-style-type: none"> ✓ recommend vision, ethos and strategic direction for their school within the overall CST strategy and local context ✓ hold the head teacher to account for the educational and financial performance of the school ✓ ensure money is well spent
Strategic improvement				
Core purpose	<ul style="list-style-type: none"> • set the CST mission and vision, and develop a CST education and financial strategy to deliver this • sign off Trust-wide schools strategy • publish an annual plan to all Trust schools with a summation of the Trusts plan, strategy and vision 	<ul style="list-style-type: none"> • sign off each school's strategy • communicate the CST mission and vision in schools • support and monitor the implementation of the strategy • support trustees in setting educational and financial targets and holding schools to account for their delivery • provide a clear Memorandum of Understanding to all schools to ensure clarity of expectation and clear communication between CE, principals and LGB 	<ul style="list-style-type: none"> • develop, propose and implement the CST mission and vision strategy in the school context • manage and maintain the school ethos and aims 	<ul style="list-style-type: none"> • propose and support development of the implementation of the CST mission and vision strategy in the school context • realise the CST mission in the local context • direct and monitor school ethos and aims • monitor the performance of the CE and Trust, and escalate dissatisfaction through the complaints procedure
Improvement schedule	Agree CST improvement plan.	<ul style="list-style-type: none"> • develop, propose, gain agreement from trustees on implementation of CST improvement plan • challenge and agree each school's individual improvement plans • monitor and challenge schools through the target setting/school improvement plan cycle. • review outcomes of school improvement plan to feed into new school plan and initiatives in conjunction with LGB 	<ul style="list-style-type: none"> • develop, propose, and gain agreement for school improvement plan at local and CE level • drive, deliver and review school improvement plans within the framework set by the trustees 	<ul style="list-style-type: none"> • challenge and support the headteacher during the development of the school improvement plan • monitor and challenge outcomes of the school improvement plan with support from CE
Standards	<ul style="list-style-type: none"> • responsible for the performance and overall outcomes of CST and the schools within it • publish an annual CST achievement report covering all schools within the Trust 	<ul style="list-style-type: none"> • responsible for ensuring all pupils make at least expected progress across the Trust • monitor and challenge student attainment, progress and school remedial action • monitor and challenge the attainment and progress of all able pupil and vulnerable groups and ensure that they are sufficiently extended or supported in their learning 	<ul style="list-style-type: none"> • responsible for ensuring all pupils make at least the agreed CST expectation of progress within their school • track and analyse student attainment and progress, reporting key headlines to CE and the LGBs • develop support interventions for the able, and all vulnerable groups 	<ul style="list-style-type: none"> • monitor student attainment and progress, including the able, and all vulnerable groups • monitor delivery of expected progress in the local school context

	Board of Trustees non-delegated responsibilities	Responsibilities delegated by the Board to the Central Executive Team (CE)	Responsibilities delegated by the Board to principals and headteachers	Responsibilities delegated by the Board to the Local Governing Body (LGB)
	To oversee Trust forecasts and target setting procedures, comment and challenge.	<ul style="list-style-type: none"> monitor school tracking procedures to ensure data is robust and secure set and monitor minimum/maximum attainment and progress targets for each school determine tools, including appropriate training, for tracking data and carrying out analysis set and clearly communicate criteria for school predictions and target setting in conjunction with local headteachers monitor and challenge progress toward the achievement of targets and take appropriate action when vulnerabilities are identified by any part of the Trust provide appropriate challenge mechanisms for failure at any level of the trust 	<ul style="list-style-type: none"> drive and deliver school improvement by using school tracking procedures ensure data is robust and secure through termly pupil performance meetings propose minimum/maximum attainment and progress targets for school and report to CE comply with criteria for school predictions and target setting and report figures to the LGB and CE monitor progress toward the achievement of targets and take swift action when vulnerabilities are identified 	<ul style="list-style-type: none"> receive and challenge reports on school targets and termly tracking reports, communicating concerns to the headteacher, CE, then the Trust to act as an objective assessment of both CE and principal delivery, challenging both where necessary
	To oversee the quality of teaching and learning across CST schools, and comment and challenge.	<ul style="list-style-type: none"> Maintain and continually improve the quality of teaching and learning across CST schools by monitoring, challenging and remediating practice as well as identifying opportunities for continual professional development share Trust-wide good practice 	<ul style="list-style-type: none"> maintain and continually improve the quality of teaching and learning in their school share good practice within school and across Trust identify areas for improvement and liaise with CE to implement them 	<ul style="list-style-type: none"> oversee the quality of teaching and learning within the school and communicate concerns to the headteacher, CE and then trustees to challenge both headteacher and CE on delivery of improvements, training and remediation of concerns
	Set strategic curriculum structure for Trust.	<ul style="list-style-type: none"> propose and gain trustee agreement on changes to curriculum structure and implement strategic policy of Trust agree to and monitor Trust-wide curriculum structures and support provision within local school contexts 	Comply with CE curriculum structures in developing individual school curricula and communicate proposed plan at school level to CE.	Oversee school curriculum structures and support and challenge headteacher and CE when discussing changes and individual plans.
	To overview monitoring and performance of Trust schools, comment and challenge.	<ul style="list-style-type: none"> monitor and challenge the outcomes of schools' self-evaluation and make recommendations for improvement monitor and challenge outcomes of headteacher reports and initiate appropriate action in response to these set and monitor Trust target for school Ofsted gradings provide clear communication of targets, challenges and respond quickly when needing to resolve issues 	<ul style="list-style-type: none"> publish school self-evaluation and act on Trust recommendations for improvement publish a minimum of three headteacher reports for discussion at Board and LGB level act and deliver on inspection recommendations 	<ul style="list-style-type: none"> receive and challenge on school self-evaluation, reporting any concerns to the headteacher, CE then trustees receive and feed back on headteacher's report, reporting any concerns to the headteacher, CE then trustees
Recruitment	Appoint the CEO, supporting him or her in the recruitment of other senior CE posts.	<ul style="list-style-type: none"> approve the recruitment and deployment of staff with cross Trust responsibilities. recruit headteachers (supported by Chair and other members of the LGB) 	Recruit all school staff other than the headteacher.	<ul style="list-style-type: none"> at the request of the headteacher, support in the recruitment of staff work in conjunction with the CE in the recruitment of school headteachers

	Board of Trustees non-delegated responsibilities	Responsibilities delegated by the Board to the Central Executive Team (CE)	Responsibilities delegated by the Board to principals and headteachers	Responsibilities delegated by the Board to the Local Governing Body (LGB)
Local Governing Body	<ul style="list-style-type: none"> approval of appointment and dismissal of Chairs and members of the Local Governing Bodies determining levels of delegation for the Executive, LGBs, headteachers (RIBs will have the same delegated powers as LGBs but there may be temporary differences in structure and procedure) provide clear mechanism through which LGB can challenge CE delivery of services 	<ul style="list-style-type: none"> monitor and quality-assure the work of the LGBs and clerking monitor the efficacy of delegation and report this to trustees source training for LGBs to ensure quality of bodies provide guidelines and procedures for LGBs to ensure they can deliver on their responsibilities 	<ul style="list-style-type: none"> work proactively with Local Governing Bodies communicate issues to CE that may undermine the position of the Trust and its work or any breaches of delegation 	<ul style="list-style-type: none"> adhere to CST guidelines and procedures e.g. breach of conduct, Governors Handbook co-opting/appointing relevant members of the LGB with support from CE
Union recognition	Approve Trust-wide policy on trade union recognition.	Undertake negotiations with trade unions over issues that have Trust-wide implications.	Undertake all negotiations with local trade unions, unless such matters have a bearing on the Trust more widely.	Support headteacher in industrial relations as requested by headteacher.
Training	<ul style="list-style-type: none"> trustees to identify their training needs and ensure knowledge is current and updated approve Trust-wide training framework 	<ul style="list-style-type: none"> identify CST and Board training needs and ensure knowledge is current and updated provide clear guidance for minimum requirements around experience and/or training for LGBs co-ordinate CPD and other educational programs for all staff and LGB identify opportunities to ensure CPD can be satisfied for all principals 	<ul style="list-style-type: none"> identify training their own and also staff training needs, evaluate and feedback to CE on the efficacy of CPD and education programs keep up to date with CST guidance 	<ul style="list-style-type: none"> to identify governors training needs and ensure knowledge is current and updated review breadth and balance of school CPD keep up to date with CST guidance
Accountability	<ul style="list-style-type: none"> responsible for putting in place a process for an independent checking of controls in all CST schools provide clear mechanism through which LGB can challenge CE delivery of services responsible for putting in place clear grievance procedures for headteacher and LGBs with respect to CE responsible for maintaining clear communication lines between LGB Chairs and trustees 	<ul style="list-style-type: none"> establish and monitor compliance audits are routinely undertaken across CST schools e.g. completion of annual conditions survey or adherence to school food standards provide clear structures for challenging CE, LGBs and headteacher that are clearly accessible by all parties 	Ensure there are controls in place in order for compliance to happen in a timely, systematic manner.	Oversee status of recommended actions following audit or inspection, communicating concerns to headteacher or CE.
Operational		Set parameters for the times of school sessions, school term dates and inset days.	Set and publish the times of school sessions and the dates of school terms and holidays within parameters agreed by the CE.	Feedback on the proposed school dates and times taking into account local contexts.
		<ul style="list-style-type: none"> clearly provide minimum legally required procedural elements to all schools review additions to legally required procedures 	Agree and adopt school procedures with school staff.	Review school procedures at least annually.
Resources	Take a strategic view of Trust-wide resources and liaise with the DFE, EFA and ministers as appropriate.	<ul style="list-style-type: none"> provide strategic, financial, HR and legal support on matters that would impact on the Trust as a whole procure Trust-wide resources that will improve outcomes for pupils and schools ensure adequate training for Trust-wide systems 	Procure resources up to a value set by CE, and consult CE on all other procurement above the level set (see Financial Handbook).	Make best value judgements on local procurement proposals.

	Board of Trustees non-delegated responsibilities	Responsibilities delegated by the Board to the Central Executive Team (CE)	Responsibilities delegated by the Board to principals and headteachers	Responsibilities delegated by the Board to the Local Governing Body (LGB)
Support and Challenge				
Policy compliance	<ul style="list-style-type: none"> approve statutory policies and contracts (HR, finance, H&S etc) ensure statutory compliancy responsibilities ensure that CE deliver policies (and updates to policies) in a timely manner 	<ul style="list-style-type: none"> hold and disseminate in a timely fashion mandatory and good practice school policies and contracts monitor statutory compliance and curriculum implementation 	<ul style="list-style-type: none"> develop non statutory policies and gain agreement from the LGB and CE comply with CST compliance policies and audits, discuss all curriculum proposals and changes with CE and the LGB 	<ul style="list-style-type: none"> receive and adopt formally CST policies ensure school procedures are aligned to CST policies and implement them at school level oversee school compliance and report concerns to headteacher, CE, then trustees
		<ul style="list-style-type: none"> have a clear complaints policy and procedure that is communicated to all parties ensure clear communication, conflict of interest reviews and transparency are core to any complaints procedure resolve or escalate complaints in line with the CST complaints policy as adopted by the school 	Resolve or escalate complaints in line with the CST complaints policy as adopted by the school.	Resolve or escalate complaints in line with the CST complaints policy as adopted by the school.
		<ul style="list-style-type: none"> assist CST schools in convening independent review panels monitor exclusion across the Trust provide guidance and support on all appeals processes 	<ul style="list-style-type: none"> ensure the statutory compliance with regard to staffing/admissions/discipline/exclusions/appeals/H&S/PP & FSM/SEND, LAC etc report panel decisions to CE comply with Admissions Policy and timelines 	<ul style="list-style-type: none"> assist the headteacher with regard to statutory compliance (staffing/admissions/discipline/exclusions/appeals/H&S/PP & FSM/SEND & LAC etc.) by convening disciplinary, admissions and exclusion hearing and appeals report panel decisions to the headteacher and CE act as admissions authority for in-year admissions reporting to LA and CE
Safeguarding	Responsible for the welfare and safeguarding of all pupils and staff.	<ul style="list-style-type: none"> monitor updating of the of the SCR and take action when this is not the case provide and update safeguarding policies, and signpost training programmes, then clearly communicate these to headteachers and LGBs provide rapid response support for staff allegations monitor schools are dealing with issues appropriately and provide support to headteachers, LGBs and Designated Safeguarding Leads conduct annual safeguarding audits, report findings to trustees and direct remedial action analyse trends and concerns across the CST schools, reporting to trustees (and LGB Chairs) and directing support or remediation 	<ul style="list-style-type: none"> establish and maintain single central record (SCR) the headteacher and other recruiting staff must complete and update safer recruitment training the headteacher must ensure the school complies with the safeguarding policies and report all serious incidents to CE, social care or LSCB as appropriate report incidents, trends, referral frequency and training needs to CE and the LGBs 	<ul style="list-style-type: none"> receive report from headteacher on status of SCR and escalate concerns to CE if appropriate members of the LGB involved in recruitment must undertake safer recruitment training the Chair of the LGB must receive and deal with allegation made against the headteacher and work with CE to resolve this received and feedback on safeguarding reports, escalating concerns to the headteacher or CE

CST Scheme of Delegation checklist – July 2015

	Board of Trustees non-delegated responsibilities	Responsibilities delegated by the Board to the Central Executive Team (CE)	Responsibilities delegated by the Board to principals and headteachers	Responsibilities delegated by the Board to the Local Governing Body (LGB)
Performance management	<ul style="list-style-type: none"> setting pay, conditions and performance management arrangements for all staff across the Trust manage performance of CEO setting and reviewing annual targets 	<ul style="list-style-type: none"> to decide performance management, capability and disciplinary policies for CST schools performance-manage headteachers (supported by Chairs and other appropriate members of the LGB) set headteacher pay levels and agree incremental rises in joint discussion with the LGB monitor and challenge outcomes of performance management or panel meetings communicate policies in a timely fashion, provide clear mechanisms for review processes and challenges 	<ul style="list-style-type: none"> ensure all staff are performance managed or appraised implement an appropriate people strategy and comply with all requirements under employment law comply with CST pay, performance management, capability and disciplinary policies performance-manage line managers or direct report roles overview outcomes of staff performance management and report vulnerabilities to CE and LGBs 	<ul style="list-style-type: none"> assist the headteacher by convening disciplinary and grievance panels work in conjunction with the CE in the performance management of headteachers, including interim and final reviews of targets propose and agree HT pay and pay increments in joint discussion with the CE receive anonymised overview of staff PM outcomes and approve their pay recommendations receive, review and approve anonymised overview of staff PM outcomes hear appeals lodged by line managers or direct report roles
Finance	Annual approval of budgets Trust-wide.	<ul style="list-style-type: none"> prepare framework for each school budget annually, monitor and challenge expenditure agree annual school budget for each school approve annually all school staffing structure proposals monitor schools against budget and address variances swiftly. 	<ul style="list-style-type: none"> develop and maintain the school's budget within the framework set by the CE seek LGB and CE approval for expenditure out of approved budget review staffing structure for efficiency and affordability 	<ul style="list-style-type: none"> propose and approve school budget for submission to CST oversee the school budget and supervise expenditure gain CST approval for expenditure out of approved overall budget propose and approve school staff structure for submission to CST
	Ensure effective financial management of the Trust.	<ul style="list-style-type: none"> publish and communicate CST Financial Handbook and monitor financial procedures across CST schools set, monitor and challenge progress towards financial targets 	<ul style="list-style-type: none"> comply with the requirements of the CST Financial Handbook meet financial targets and report any financial vulnerabilities to CE ensure delivery of the approved budget or better 	<ul style="list-style-type: none"> check adherence to the CST Financial Handbook and controls review expenditure, proposed capital and operational expenditure plans challenge variances to budget support the headteacher in the delivery of the approved budget
	<ul style="list-style-type: none"> approve capital expenditure plan for the Trust approve the CST overall strategic plan for capital expenditure taking into account the strategic plans of each school 	<ul style="list-style-type: none"> to draw up and gain approval of priorities for capital expenditure across the Trust to develop and monitor a buildings strategy to ensure that all property remains 'fit for purpose' to specify project management arrangements for major capital projects (in consultation with CST central team) lead on cross Trust procurement activities 	Develop a building strategy for the school and ensure proposal about capital expenditure priorities are submitted to the Trust.	To be aware of building strategy or conditions survey for the school and report anomalies to headteacher or CE.
	Approve any long-term commitments or liabilities of more than a year e.g. taken out by the school.	Approve and monitor any long-term commitments or liabilities of more than 1 year.	Consult with CE on any long-term commitments or liabilities.	Provide feedback to HT on any long-term commitments or liabilities of 1 year.

	Board of Trustees non-delegated responsibilities	Responsibilities delegated by the Board to the Central Executive Team (CE)	Responsibilities delegated by the Board to principals and headteachers	Responsibilities delegated by the Board to the Local Governing Body (LGB)
Data requirements	Approve submissions to DfE/ EFA as appropriate.	<ul style="list-style-type: none"> ensure core data required by the DfE/EFA is submitted on time and accurately establish and support schools in the management of data reporting mechanisms to CST compile and monitor the performance data of schools compared to national and CST expectations specify and monitor data requirements, templates and reporting timescales for the Trust e.g. SEN, LAC, FSM, PP, exclusions, attendance etc comply with minimum requirements in relation to management information reporting requirements and data security/retention and back-up 	Ensure all specified CE and statutory deadlines are met and reported to CE and the LGB through documents such as the termly headteacher's report.	Oversee CE specified deadlines have been met within timescales.
Risk management	Oversee, review and challenge CST risk register, management issues, manage and mitigate strategic risks for Trust.	<ul style="list-style-type: none"> develop and monitor risk management processes across all CST schools and support schools to take appropriate action clearly communicate standard risk management expectations, including a standardized approach to minimum levels of assessment and reporting create and maintain CST-wide risk register execute and oversee risk mitigation and related actions 	<ul style="list-style-type: none"> compile risk register for school and ensure potential risks are communicated to CE and LGB, and are mitigated in school procedures/ improvement plans to procure suitable insurance cover including premises, contents, business interruption, governing body and employer liability, and statutory motor transport insurance 	Oversee the school's risk management register and ensure appropriate action is taken.
	Receive and challenge headline and critical incident reports.	<ul style="list-style-type: none"> monitor health and safety issues and incidents, provide support at Trust level when necessary report critical incident to trustees monitor and challenge figures for safeguarding, exclusions, restraint, racist incidents and attendance, reporting headlines and critical incidents to trustees 	<ul style="list-style-type: none"> maintain school's facilities and ensure H&S requirements are adhered to collate figures for safeguarding, exclusions, restraint, racist incidents and attendance, and work to improve them ensure all the above incidents or data figures are reported to CE and the LGB in a timely manner 	<ul style="list-style-type: none"> ensure the overall health and safety procedures of the school, oversee documentation is up to date. overview safeguarding, exclusions, restraint, racist incidents and attendance figures within the school and report concerns to headteacher, CE then trustees
	Approve business continuity strategy.	Review and gain trustee approval of business continuity arrangements.	Develop, gain approval and implement a business continuity plan for the school.	Oversee and feedback on business continuity plan.
		Evaluate pupil numbers across schools and the impact on the financial health of the Trust.	Track pupil numbers and develop strategy to increase or decrease number as appropriate.	Monitor pupil numbers and the impact on the financial health of the school.

	Board of Trustees non-delegated responsibilities	Responsibilities delegated by the Board to the Central Executive Team (CE)	Responsibilities delegated by the Board to principals and headteachers	Responsibilities delegated by the Board to the Local Governing Body (LGB)
Communication and Collaboration				
Collaboration	Maximise the opportunities of being part of the wider CfBT group.	<ul style="list-style-type: none"> • coordination of sharing of resources and best practice across the Trust • accessing CfBT's wider resources and research for the benefit of schools • maximising the opportunity for international school links • develop a systemised approach for disseminating good practice, that is accessible by all members of the Trust 	Utilise CE resources and share good practice across other Trust schools.	<ul style="list-style-type: none"> • provide regular feedback to CE on effectiveness of resources • share good practice across the Trust, networking with other LGBs for the purpose of school improvement • school marketing and PR (jointly with CE where required)
		<ul style="list-style-type: none"> • manage relationships with the DfE / EFA, LAs and other external agencies • liaise other MATs, NSCL and others to ensure the interests of CST and member schools are well represented 	Establish/maintain relationships with the LA and other external agencies who support student learning and their social needs.	<ul style="list-style-type: none"> • collaborate with CST/CE groups and parents and the local community • challenge headteachers and CE when opportunities for collaboration are not explored
Communication	<ul style="list-style-type: none"> • Ensure there is effective communication between Trustees, the Central Executive Team and LGBs .eg. termly forums or AGMs or conference days 	<ul style="list-style-type: none"> • ensure there is effective communication between trustees, staff, LGBs, and all stakeholders • develop communication mechanism between the schools e.g. The Governors Hub, heads' forums, governor events • communicate local views to trustees and vice versa 	<ul style="list-style-type: none"> • ensure there is effective communication between CST, the school, governors parents, pupils and the local community • communicate satisfaction or concerns to the LGB or CE 	<ul style="list-style-type: none"> • ensure there is effective communication between CST, the school, parents, pupils and the local community • communicate satisfaction or concerns to CE or Trust Board • (NB: whilst the LGB will work with the HT and the CE on a day-to-day basis, and the SoD is written to reflect this, it is recognised that the LGB reserves the right to report directly to the board when it is necessary)
			<ul style="list-style-type: none"> • promote high levels of parental support • undertake annual pupil and parent satisfaction surveys and publish reports 	<ul style="list-style-type: none"> • ensure appropriate parental input to the school by managing parent, staff forums and collating feedback using a variety of methods • participate and feedback on pupil voice activities
	To communicate with the press and media on matters having a bearing on the national reputation of the Trust and ensure that all issues that put the reputation at risk are reported to CE.	To communicate with the press and media on matters having a bearing on the national reputation of the Trust and ensure that all issues that put the reputation at risk are reported to CE.	To communicate with press and media on all matters relating to the school ensuring appropriate escalation to CE where required.	Participate in community activities.
	Determine and approve CST brand.	Communicate and ensure correct use of CST branding.	To comply with the Trust's branding requirements.	To comply with the Trust's branding requirements.
		Manage CST web presence, monitor school websites.	Manage school website and ensure legal compliance.	Review and contribute to the school website.