Furness Education Trust
Scheme of Delegation Matrix
2026-2027

Accountable/Responsible/Support/Consulted/Informed

Function	Number	Activity	Members	Trustees	CEO	LAC	Head Teacher	CFO/ COO
Strategy and Function	1	To determine mission, direction, values and aims and strategic objectives of the Trust and prepare an annual Trust Business Plan.	S/I	A	R	S	S	
	2	To determine the scope of central services to be delivered by The Multi Academy Trust to and on behalf of the academies.		A	R	C	C	S
	3	To identify additional services to be procured on behalf of the academies.		A	R	C	C	S
	4	To ensure centrally delivered services provide value for money.		A	R	I	C	R
	5	To set the times of academy sessions and the dates of terms and holidays		A	C	C	R	
	6	To consider requests from other schools to join the Multi Academy Trust		A	R	I	S	S
	7	To agree academy level policies and procedures within Trust policy framework		A	S	R	S	S
Education	1	To propose targets for student achievement.		A	S	S	R	
	2	To agree targets for student achievement		A	R	C	C	
	3	To establish a Trust behaviour policy		A	R	S	S	
	4	To review the use of exclusions and to decide whether or not to confirm all permanent exclusions		A	I	R	S	
	5	To direct reinstatement of excluded students		A	I	R	I	
	6	To produce the Academy Development Plan		A	S	C	R	
	7	To agree the Academy Development Plan		A	R	C	S	
	8	To develop a curriculum policy and framework		A	R	C	C	
	9	To implement a curriculum policy		A	S	S	R	
	10	To prohibit radicalisation and promote equality and diversity and tolerance and ensuring the balanced treatment of political issues		A	S	S	R	
	11	To ensure the quality of teaching		A	S	S	R	
	12	To discharge duties in respect of students with special educational needs and disabilities		A	S	S	R	
	13	To ensure the quality of individual child's education		A	R	C	S	
	14	To ensure the quality student outcomes		A	R	C	S	

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Governance	1	To appoint/remove Members and Trustees	A	C				
	2	To review and amend Articles of Association	A	C	C			
	3	To change the name of the Academy Trust	A	C	C	C		
	4	To hold the Trust Board to account, attend the AGM and receive annual report	A	R				
	5	To appoint/establish committees of the Trust and reviewed annually.		A	C	C	I	
	6	To identify and review on an annual basis the skills and experience required (skills audit) for the Trust Board and recruitment/training		A/R	S			
	7	To agree and publish a Scheme of Delegation for governance		A	R	I/C	I	S
	8	To appoint (and remove) the Chair of the LAC		A	R	I/C	I	
	9	To appoint and dismiss the Clerk to the Trust Board + LACs		A	R	I	I	
	10	To hold a full LAC meeting at least three times a year and review and report the performance of the academy.		A	I	R	S	
	11	To appoint, remove and actively seek members of the LAC		A	R	R	I/S	
	12	To approve governance documents and any amendments thereafter.		A	R	I/C	I	
	13	To approve and set up a governors' expenses scheme		A	R	I/C	I	
	14	To review and challenge progress of the Trust against strategic objectives		A	R	S	S	
	15	To consider whether or not to exercise delegation of functions to individuals/committee		A	R	S	I	
	16	To regulate LAC procedures		A	R	C/R	I	
	17	To determine the development needs of the governors and put in place an appropriate programme		A	R	R	I/S	
	18	To develop a safeguarding policy in line with statutory requirements and best practice		A	R	I	I	
	19	To determine, on an annual basis, those policies which will be developed by the MAT and mandatory for all MAT academies		A	R	I/C	I	
	20	To provide to the MAT, on an annual basis, copies of all current policies and procedures and a schedule for their review, to review and update policies where allocated to the academy.		A	S	R	S	
	21	To provide a Complaints Procedure policy		A	R	I	I	

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Governance	**22**	To develop a common reporting and assessment framework		**A**	**R**	**C**	**S**	
	23	To approve Trust Safeguarding and Child Protection Policy		**A**	**R**	**S**	**S**	
HR and Operations The Trust Board is responsible for all HR aspects associated with the CEO in accordance with the Trust policies and procedures.	**1**	To appoint a Headteacher		**A**	**R**	**C/R**	**I**	
	2	To appoint a Deputy Headteacher		**A**	**I**	**C**	**R**	
	3	To agree a pay policy for all MAT staff.		**A**	**R**	**I/C**	**C**	
	4	To appoint / dismiss Chief Executive Officer (CEO) and CFO		**A**		**I/C**		
	5	To appoint/dismiss the Headteacher		**A**	**R/S**	**C**	**I**	
	6	To implement the Trust's safeguarding policy		**A**	**S**	**S**	**R**	
	7	To set Trust wide procurement policies in accordance with FA and ATH		**A**	**R**	**I**	**I**	**R**
	8	To agree H&SW Policy and Procedure Framework		**A**	**R**	**I**	**I**	**R**
	9	To establish Trust wide HR policies (including recruitment, disciplinary, grievance)		**A**	**R**	**I**	**I**	**R**
	10	To agree changes to the staffing structure of the Trust and each academy.		**A**	**R**	**S**	**S**	**C**
	11	To appoint academy teachers other than Headteacher and SLT.		**A**	**I**	**S**	**R**	
	12	To appoint non-teaching academy staff within agreed budget.		**A**	**I**	**S**	**R**	**C**
	13	To ensure provision of free school meals to those students meeting the criteria		**A**	**I**	**S**	**R**	
	14	To ensure there is qualified teacher designated as SENCO for the academy		**A**	**I**	**S**	**R**	
	15	To appoint members of academy SLT.		**A**	**C**	**C**	**R**	**S**
	16	To appoint central service staff		**A**	**R**	**I**	**C**	**R**
	17	To dismiss and suspend staff other than Headteacher		**A**	**S**	**C**	**R**	**S**
	18	To set appraisal performance management and pay review policy.		**A**	**R**	**C**	**C**	
	19	To set terms and conditions of employment and staff handbook		**A**	**R**	**C**	**C**	**C/S**
	20	To determine staff complement within agreed budget		**A**	**S**	**C**	**R**	**C/S**
	21	To determine dismissal payment/early retirement of the Headteacher		**A**	**R**	**I**	**I**	**C**
	22	To determine dismissal payment/early retirement of others		**A**	**S**	**C**	**R**	**C**
	23	To conduct staff appraisals at academies, monitor & report performance to CEO		**A**	**S**	**S**	**R**	

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Finance	1	To agree and annually review a Scheme of Financial Delegation and Regulation		A	S	C	C	R
	2	To recommend for approval the first formal budget plan each financial year.		A	R	I	C	C
	3	To plan, manage, monitor and report monthly expenditure at academies and identify actual or potential items of budget overspend/underspend		A	R	I	C	R
	4	To plan, manage and monitor monthly expenditure of the MAT and identify and report actual or potential items of budget overspend/underspend		A	S	S	R	R
	5	To approve any amount to be transferred between budget headings and/or likely budget overspends in line with authorisation document		A	S	S	R	R
	6	To establish financial decision levels & limits and appropriate financial controls		A	S	S	C	R
	7	To establish a charging and remissions policy for the academies.		A	R	I	I	R
	8	To appoint the internal auditor for the academy.		A	R	I	S	S
	9	Agreeing miscellaneous financial expenditure outside the agreed budget.		A	R	S	C	C
	10	To enter into additional contracts which exceed the agreed annual budget allocation within limits specified in the Financial Regulations Manual.		A	R	S	S	R
	11	To authorise acquisition of assets within limits specified in the Financial Regulations Manual.		A	C	R	S	R
	12	To authorise the disposal of assets within limits specified in the Financial Regulations Manual		A	R	I	I	R
	12	To appoint external auditors	A	S	R	I	I	C
	14	To make academy payments within agreed financial limits.		A	R	I	I	R
	15	To collect income due to the academy		A	R	C	S	R
	16	To maintain proper financial records for the academy		A	R	I	I	R
	17	To prepare monthly accounts for the academy		A	I	R	S	R
	18	To monitor compliance with approved financial procedures.		A	I	R	S	R
	19	To agree Risk Management Policy and Procedure Framework		A	R	I	I	R
	20	To decide how to apply Pupil Premium.		A	I	C	R	S

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Admissions & Organisational changes	**1**	To consult before setting/amending an admissions policy		**A**	**C**	**C**	**R**	
	2	Admissions: Application decisions		**A**	**S**	**C**	**R**	
	3	If appropriate to appeal against LA directions to admit students		**A**	**S**	**R**	**S**	
	4	To publish proposals to change category of academy		**A**	**R**	**C**	**I**	
Academy Premises	**1**	To implement a Health & Safety Policy		**A**	**S**	**C**	**R**	**S**
	2	To ensure appropriate Buildings Insurance, Public Liability and other insurance cover		**A**	**R**	**I**	**C**	**R**
	3	To develop academy buildings and estate long term strategy.		**A**	**R**	**I**	**C**	
	4	To maintain buildings, including developing properly funded maintenance plan		**A**	**S**	**S**	**R**	**S**
	5	To ensure that Health & Safety regulations are followed		**A**	**S**	**R**	**R**	**S**
	6	To ensure premises security and management of assets		**A**	**S**	**S**	**R**	**S**
Information Sharing	**1**	To prepare and publish the academy prospectus.		**A**	**I**	**I**	**R**	
	2	To agree Freedom of Information and Data Protection Policy and Procedure		**A**	**R**	**I**	**S**	
	3	To assemble data for student assessment and other returns		**A**	**C**	**I**	**R**	
	4	To maintain accurate, effective and secure student records in partnership with the LAC		**A**	**I**	**S**	**R**	
	5	To ensure the academy website is fully compliant.		**A**	**S**	**S**	**R**	