



**THE OAK PARTNERSHIP TRUST
SCHEME OF DELEGATION**

The Board of Directors has overall legal responsibility for the operation of the Trust and the Schools within it. It is legally responsible and accountable to the DfE and has to operate and comply with the provisions set out in its constitutional documents and all relevant legislation including the Articles of Association of the Trust, the Master Funding Agreement and the Academy Trust Handbook.

The purpose of this Scheme of Delegation is to set out the lines of responsibility and accountability in The Oak Partnership Trust so that roles and responsibilities in the governance and executive structures are clear.

Document Information

	Information
Document author:	Barney Rycroft/Carole Buckhurst
Document approval:	16/01/2025 / 23/10/2025
Publication date:	31/03/2025
Review schedule /date:	Annually
Distribution:	Trust Website
Document status	

Version Control

Version	Issue Date	Amended by	Comments
1	31/03/2025	BR/CB	New document and layout

Verbs Used	Definition of the verbs
-------------------	--------------------------------

Determine	Holding ultimate responsibilities, where no deliver will also undertake the action.
Deliver	Is responsible for undertaking the action.
Consulted	Will be included in undertaking the action and consulted on related decisions.
Informed	Will be informed of any decisions made and/or actions undertaken.

VISION, ETHOS & STRATEGY (Including Compliance)

	Members	Directors				Executive Team	Gov Prof
		Full Board	FAR	Standards	Pay/Nom		
1. STRATEGY							
Setting overall vision and strategy, culture and values of the Trust	Inform	Determine				Consult/Deliver	
Review and challenge progress of the Trust against its strategic objectives and KPIs	Inform	Determine				Deliver	
Admission of new schools to the Trust	Inform	Determine				Deliver	
2. GOVERNANCE							
Approval of changes to Articles	Determine	Inform					
Appointment of Chair and Vice Chair to the Board	Inform	Determine					
Establishment of high-performing governance structure	Inform	Determine				Consult	Deliver
Reviewing governance structure		Determine				Consult	Deliver
Establishment of committees/portfolios and Chairs		Determine					Deliver
Changes to Scheme of Delegation	Determine	Deliver				Consult	
Establish governance terms of reference and review annually (Board, committees, LSCs)		Determine				Consult	Deliver
Training programmes for governors		Determine				Consult	Deliver
Appoint and remove Chairs of LSCs		Determine					
Organise calendar of Board and LSC meetings		Determine				Inform	Deliver
Appoint and remove Directors (promoting and monitoring diversity)	Determine						
Appoint and remove Company Secretary and Governance Professional		Determine					
Appoint and remove Clerks to LSCs		Determine				Consult	Deliver
Appoint and remove Members	Determine						
Appoint Chairs of Committees		Determine					
Maintenance of Register of Interests		Determine					Deliver
Approval of Trust statutory policies not referenced under other sections		Determine				Deliver	
Ensure compliance with Equalities legislation		Determine				Deliver	

3. SCHOOL AND TRUST ORGANISATION							
School times of day and term dates		Inform				Determine	Deliver
Change of School Age Range		Determine				Deliver	
Partnership level logo and branding		Determine				Consult/Deliver	
Change name of The Oak Partnership Trust	Determine	Consult				Consult/Deliver	
Sign off proposed changes to Academy school level logo, branding and uniform						Inform	
Setting school uniform policy						Consult	
4. SAFEGUARDING							
Ensure suitable Safeguarding policy and associated procedures are in place in all schools		Determine				Deliver	
Monitor the effectiveness of the Safeguarding policy		Determine				Deliver	
Setting safeguarding Trust practices (including recruitment)		Determine				Deliver	
Receive an Annual Report on the schools' Safeguarding policy and procedures		Determine				Deliver	
Nominating safeguarding governor on each LSC							
Ensure annual safeguarding audits take place and are appropriately reported to the Board		Determine				Inform	
Report on school website compliance		Determine					
Appoint Designated Teacher to oversee support for looked after children							
Ensure suitable Whistleblowing policy and associated procedures are in place in all schools		Determine				Deliver	
5. ADMISSIONS AND ATTENDANCE							
Agree Admissions Arrangements (policies) in consultation with LSCs, LA and Diocese where applicable		Determine					Deliver
Determine and publish Admissions Arrangements		Determine					Deliver
Allocation of in year places under PAN							
Admittance over PAN/refusal of places*		Determine					
Oversee attendance registers							
Attendance Policy		Determine				Deliver	

6. HEALTH & SAFETY							
To agree a Health & Safety Policy and set up arrangements to manage health & safety		Determine				Deliver	
Risk monitoring and reporting of health & safety risks to the Board		Determine				Deliver	
Critical Incident Plan		Determine				Deliver	
7. PREMISES & INSURANCE							
Ensure Asbestos, Legionella & Fire Management Plans are in place and compliant							
Ensure all statutory inspections within all academies are compliant with statutory legislation						Determine	
Ensure effective management and maintenance of the Academies buildings, including the development of an estate strategy		Determine				Deliver	
Ensure buildings insurance and liability insurances are in place		Determine				Deliver	
Acquiring and disposing of Trust land		Determine				Deliver	
Changing use of land assets		Determine				Deliver	
8. ACCOUNTABILITY							
School lunch - ensure provided to appropriate nutritional standards		Determine				Deliver	
Provision of free school meals to those meeting criteria		Determine					

FINANCIAL PERFORMANCE							
	Members	Directors				Executive Team	Gov Prof
		Full Board	FAR	Standards	Pay/Nom		
1. STATUTORY REPORTING							
Trust Annual Accounts	Determine	Deliver				Consult	
Response to Auditors' Management Letter		Determine				Deliver	
Appointment/Removal of auditors	Determine	Deliver				Consult	
Budget Forecast Return		Determine				Deliver	
Other Accounting Returns		Determine				Deliver	

Compliance with ESFA requirements		Determine				Deliver	
2. SYSTEMS OF INTERNAL FINANCIAL & RISK CONTROL							
Funding model across the Trust		Determine	Consult			Deliver	
Financial policies (including investment and procurement)			Determine			Deliver	
Appoint of Internal Auditors	Determine	Deliver				Consult	
Annual programme of internal scrutiny		Inform	Determine			Deliver	
Maintaining risk register (financial and co-operate)		Inform	Determine			Deliver	
Establish financial contingency plan with appropriate level of reserves to ensure continued operation in the event of substantial financial loss		Determine				Deliver	
Setting delegated authority limits for financial transactions (finance authorisation levels)		Determine				Deliver	
3. BUDGET AND MANAGEMENT REPORTING							
Trust Budget - 1 Year Plan	Inform	Determine				Deliver	
Trust Budget - 3 Year Plan	Inform	Determine				Deliver	
Trust Budget - Current Year	Inform	Determine				Deliver	
Schools Budget - Current Year		Determine				Deliver	
Trust Monthly Management Accounts		Determine	Inform			Deliver	
Pupil Premium strategy and other restricted funds i.e. sports		Determine					
Open new bank accounts		Determine				Deliver	
4. FIXED ASSETS							
Asset Register		Determine	Inform			Deliver	
Addition and disposal of assets			Determine			Deliver	

EDUCATIONAL PERFORMANCE & STAFF PERFORMANCE MANAGEMENT

	Members	Directors				Executive Team	Gov Prof
		Full Board	FAR	Standards	Pay/Nom		
1. PERFORMANCE & CURRICULUM							
Pupil achievement	Inform	Inform		Inform		Determine	
School Improvement Plan						Consult	
Review progress against School Improvement Plan						Consult	

Ensuring appropriate levels of support, challenge and intervention to support delivery of education outcomes		Inform		Determine		Deliver	
School SEF evaluation						Consult	
School curriculum design including EYFS				Inform		Determine	
Trust curriculum design				Inform		Determine	
Curriculum delivery				Inform		Determine	
Careers guidance				Inform		Determine	
Relationships, Sex & Health Education and policy		Determine		Inform		Deliver	
Collective Worship & RE policy				Inform		Inform	
Offsite visits policy						Determine	
SEND Policy and compliance with Code of Practice		Determine		Inform		Deliver	
Development and enhancement of Christian distinctiveness/SIAMS	Inform	Inform		Inform		Determine	
2. PUPIL DISCIPLINE							
School behaviour principles				Determine		Deliver	
School Behaviour policies				Inform			
Exclusions policy				Determine		Deliver	
3. STAFF & PAY							
Performance review CEO (Accounting Officer)		Determine					
Appoint CFO		Determine					
Appoint/performance review Head Teachers		Determine			Inform	Deliver	
Appoint/performance review staff on leadership scales					Inform	Determine	
Appoint/performance review Executive Team		Determine			Inform	Deliver	
Approve staff HR policies (including equality, appraisal, disciplinary, grievance, capability & safer recruitment policies)					Determine	Deliver	
Monitor appraisal process					Determine	Deliver	
Approve Pay policy (includes pay levels)					Determine	Deliver	
Teaching and support staff appointments							
Suspension/Return of CEO		Determine					
Suspension/Return/Dismiss of Executive member of Executive Team		Determine					
Suspension/Return/Dismiss of staff on leadership scales		Inform				Determine	

Approve Trust Executive staff structure		Determine				Deliver	
School staffing structure changes outside budget			Inform			Determine	
School staffing structure changes within budget			Inform			Consult	
Staff redeployments			Inform			Determine	
Pay scale and range of Academy Heads		Determine				Deliver	
Pay scale and range of Executive Team		Determine					
Approve teacher pay progressions					Inform	Consult	
Setting Code of Conduct		Determine				Deliver	
Setting Terms and Conditions of Employment		Determine				Deliver	
Determine central services structure		Determine				Deliver	

Notes: *Admissions over PAN are determined by the Board of Directors. This decision is delegated to an Admissions Panel, which consists of the Chair and CEO.

SIG	LSC	Headteachers
	Consult	Consult
	Inform	Inform
	Consult	Consult
	Consult	
	Consult	
	Inform	Inform
	Inform	Inform

	Consult	Consult
	Consult	Consult
	Consult	Consult
	Consult	Consult
	Determine	Deliver
	Determine	Deliver
	Inform	Consult
	Inform	Consult
	Inform	Inform
	Determine	
		Deliver
Inform		Deliver
	Inform	Determine
	Inform	Consult
	Consult	Inform
		Determine
		Determine
	Inform	Consult

	Inform	Consult
	Inform	Consult
	Inform	Consult
	Inform	Determine
	Inform	Deliver
	Inform	Consult
		Deliver

SIG	LSC	Headteachers

		Consult
		Inform
		Consult
		Inform
		Consult
		Consult
		Inform
		Consult
		Inform
		Deliver

SIG	LSC	Headteachers
		Deliver
Inform		Determine
Determine		Deliver

Consult		Inform
Inform		Determine
Inform		Deliver
		Consult
Inform		Deliver
Inform		Deliver
	Inform	Consult
	Consult	Determine
		Deliver
	Inform	Consult
	Consult	Deliver

	Inform	Consult
	Determine	Deliver
	Inform	Consult

	Consult	
	Consult	Deliver
		Consult
		Consult
		Determine

		Consult
		Determine
		Deliver
		Determine
	Inform	Consult