WHINLESS DOWN ACADEMY TRUST

Delegation of Functions 2026-2027

Introduction

x – Recommend/Responsibility ● – Approve/Who the responsible person/body reports to

Key Function	No	Tasks	TB	LGB	FSARC	CEO	HT	TBM	SLT
Finance	1	Draft Initial Budgets.			x	●		x	
	2	To approve the formal Academy school's budget closedown and budget plan for the financial year.	●		x				
	3	To monitor monthly expenditure (chair/finance trustee).			●	x			
	4	To monitor specific cost centres through reports.			●	x		x	
	5	To monitor 5 times per year.	●		●	x		x	
	6	Approve the Financial Policies and Procedures	●		X				
	7	Responsibility for FMGS (When required – new schools joining).			●	x	x	x	
	8	Recommend to Members the appointment of External Auditors (Members to appoint).	●					x	
	9	To establish a charging and remissions policy.		x		●	x		
	10	To approve any new or end of term contracts more than £50 000.	●		x	x		x	
	11	To approve any new or end of term contracts between £30 000 to £50 000.			●	x		x	
	12	To approve any new or end of term contracts less than £30 000.				●		x	
	13	To ensure accurate and compliant payment processes.				x	x	●	
	14	Miscellaneous Financial Decisions.				●			
	15	Report Financial monitoring to LGB.		x			●		
	16	To agree Pupil Premium Strategies for each School.			●	x	x		
	17	To monitor the impact of Pupil Premium funding and Covid Recovery funding.			●		x		
	18	To agree sports premium strategies for each school.		●			x		
	19	To monitor the impact of sports premium funding.		●		x	x		
	20	To approve Special Payments up to £15,000				●			
	21	To approve Special Payments between £15,000 to £50,000			●	●			

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Key Function	No	Tasks	TB	LGB	FSARC	CEO	HT	TBM	SLT
Staffing	1	CEO/Executive HT Appointment/Dismissal/Suspension	●						
	2	Head Teacher appointment/Dismissal/Suspension	●			x			
	3	Other Leadership Appointments/Dismissal/Suspension				●	x		
	4	Other Teaching Appointments/Dismissal/Suspension					●		x
	5	Appoint Other class-based Staff/Dismissal/Suspension					●		x
	6	Admin, Site and Catering staff appointments.					x	●	
	7	Agree the Pay Policy	●			x			
	8	Establishing disciplinary/capability procedures	●			x			
	9	Determining Staff Structure	●	x		x	x		
Key Function	**No**	**Tasks**	**TB**	**LGB**	**FSARC**	**CEO**	**HT**	**TBM**	**SLT**
Appraisal	1	To establish an appraisal policy.	●			x			
	2	To implement an appraisal policy.				●	x	x	x
	3	To review the appraisal policy annually.	●			x	x		
	4	To agree pay progression of all staff exc. CEO				●	x		
	5	CEO/ Exec HT appraisal carried out by Members of Trust Board and ind. Educationalist support and to determine Exec HT Pay decision.	●						
Key Function	**No**	**Tasks**	**TB**	**FSARC**	**LGB**	**CEO**	**HT**	**TBM**	**SLT**
Academy Improvement	1	Setting the values, visions and strategic aims for the Trust.	●			x			
	2	Developing and implement a MAT Strategic Plan	●			x			
	3	Developing and implementing a SIP for each academy.				●	X		
	4	Monitor the milestones within the SIP for each academy.			●		X		
	5	Undertake School Self Evaluation to support next steps.			●	x	x		
	6	Monitoring (by Head Teacher) and evaluating (by CEO) the quality of teaching and learning.			x	●	x		x
	7	To review the impact of teaching and learning.	●		x	x	x		x

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Key Function	**No**	**Tasks**	**TB**	**FSARC**	**LGB**	**CEO**	**HT**	**TBM**	**SLT**
Curriculum	1	Ensure NC is taught to all pupils and to consider any disapplication for pupil(s)	●				x		
	4	Responsibility for standards of teaching	●			x	x		x
	5	Responsibility for individual child's education				●	x		x
	6	To establish and keep up to date a written policy for RSE	●			x	x		x
	7	Prohibit political indoctrination and ensuring the balanced treatment of political issues, including support for 'British Values'.	●			x	x		x
	8	To monitor the impact of the curriculum policy			●	x	x		
	9	Holding school leaders to account for the quality of education	●			x			
Key Function	No	Tasks	**TB**	**FSARC**	**LGB**	**CEO**	**HT**	**TBM**	**SLT**
Inclusion	**1**	**To implement a Trust SEND and Disability Policy**	●			x			
Key Function	**No**	**Tasks**	**TB**	**FSARC**	**LGB**	**CEO**	**HT**	**TBM**	**SLT**
Discipline and Exclusions	1	To Establish and implement a positive behaviour policy	●			●	x		
	2	To regularly review the use of exclusion			●	x	x		
	3	Confirm Permanent and fixed term exclusions (15 days in a term)	●			x			
	4	To convene a committee in respect of any permanent exclusion.	●		x	x			
Key Function	**No**	**Tasks**	**TB**	**FSARC**	**LGB**	**CEO**	**HT**	**TBM**	**SLT**
Admissions	1	Establish an admissions Policy	●			x			
	2	Application decisions	●			x	x		
	3	To appeal against LA directions to admit pupils (LA appeal system)	●			x			
Key Function	**No**	**Tasks**	**TB**	**FSARC**	**LGB**	**CEO**	**HT**	**TBM**	**SLT**
Premises and Insurance	1	Buildings insurance and personal liability		●				x	
	2	Premises and maintenance action plan		●				x	
	3	Procuring and maintaining buildings and development	●			x		x	
Key Function	**No**	**Tasks**	**TB**	**FSARC**	**LGB**	**CEO**	**HT**	**TBM**	**SLT**
Health and Safety	1	To establish a Health and Safety Policy	●					x	
	2	To ensure that Health and Safety regulations are followed	●		x	x	x	x	
School Organisation	1	Proposal to alter the character of the Academy Day	●			x			
	2	To set the times of school sessions and the dates of school terms and holidays	●			x	x		

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Key Function	**No**	**Tasks**	**TB**	**FSAC**	**LGB**	**CEO**	**HT**	**TBM**	**SLT**
Information for Parents	1	To ensure provision of free school meals to those pupils meeting the criteria	●				x	x	
	2	Adoption and review of home-school agreements				●	x		x
Key Function	**No**	**Tasks**	**TB**	**FSAC**	**LGB**	**CEO**	**HT**	**TBM**	**SLT**
GB Procedures	1	To appoint the chair and vice chair of a permanent or a temporary governing body	●		x				
	1A	To remove the chair or vice chair of a permanent or a temporary governing body.	●		x				
	2	To ensure there is a full complement of governors	●		x		x		
	3	To appoint and dismiss the governance professional	●		x				
	4	To appoint and remove governors	●		x				
	5	To establish a Register of Governors' Business Interests	●		x				
	6	To set up and approve governors expenses scheme	●						
	7	To determine delegation functions	●						
	8	To determine the Vision and Values of individual school (in line with the Trust Boards Vision and Values)			●	x	x		
Key Function	**No**	**Tasks**	**TB**	**FSAC**	**LGB**	**CEO**	**HT**	**TBM**	**SLT**
Academy Trust	1	To regulate the GB procedures through the Terms of Reference	●		x	x	x		
	2	To determine the Vision and Values of The Trust Board	●			x			
	3	To consider requests from other schools to join the MAT	●			x			
	4	To appoint and remove trustees. (Only Members)							
	5	To maintain website is statutory compliant					●		x
	6	To monitor website is statutory compliant			x	●			
	7	To ensure compliance of GDPR	●		x	x	x	x	x
	8	To ensure appropriate procedures are in place for Whistleblowing	●			x			
	9	Management of Risks including contingency and business continuity planning, adequate insurance and maintaining a risk register.	●			x			
	10	To establish a roles and responsibilities documents	●			x			
	11	To approve the Attendance Policy	●			x			
	12	To monitor the implementation of the attendance policy and attendance levels			●		x		

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Key Function	**No**	**Tasks**	**TB**	**FSAC**	**LGB**	**CEO**	**HT**	**TBM**	**SLT**
Safeguarding	1	To establish a trust wide Safeguarding and Child Protection Policy.	●				x		
	2	To monitor the trust wide Safeguarding and Child Protection Policy.	●		x	x	x		