



Mulberry Academy Trust Scheme of Delegation for Good/ Outstanding Schools Reviewed February 2024

Within this document the phrases used have the following meanings:

Consult: the individual/group that should be consulted as part of the process of completing a particular task.

Deliver: the individual/group that has responsibility for undertaking the particular task delegated to them and reporting on its delivery at suitable intervals. In the case of the EP this will be at Trust level. In the case of the Principal this will be at Academy level.

Determine: the individual/group that has primary responsibility for ensuring the particular task is completed and determining how the Trust and/or Academies (as appropriate) should undertake the task including determining appropriate milestones and targets to be reported against.

Develop: the individual/group that has responsibility for developing proposals relating to a task for discussion and approval by the appropriate decision-making individual/group.

Recommend: the individual/group that should make recommendations as to how a particular task should be completed. In the case of (i) the EP they will be making recommendations to the Board and/or LGB (as appropriate), (ii) the LGB they will be making recommendations in relation to their Academy to the Board, EP and/or Principal (as appropriate) and (iii) the Principal they will be making recommendations in relation to their Academy to the EP and/or LGB (as appropriate).

Report: the individual/group that has responsibility for reporting on the delivery of tasks. In the case of (i) the EP they will be making reports to the Board and/or LGB (as appropriate), (ii) the LGB they will be making reports in relation to their Academy to the Board and/or EP (as appropriate) and (iii) the Principal they will be making reports in relation to their Academy to the EP and/or LGB (as appropriate).

Review: the individual/group that has responsibility for reviewing whether a particular task is being carried out satisfactorily and where appropriate requiring action to be taken to ensure task is delivered appropriately. In the case of (i) the Board they will be reviewing the EP and/or LGB (as appropriate), (ii) the EP they will be reviewing the Principal and (iii) the LGB they will be reviewing the Principal and his leadership team.

Comply: the individual/group will follow agreed policies and procedures.

Review Period: Annual

Policy Date Last Reviewed: September 1st 2023



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Person Responsible: Director Business & Finance

Version Number: 2.0

To assist interpretation of the matters delegated the table below provides additional comment as appropriate

1. Strategy and Leadership	Trustees	Executive Principal	LGB	Principal
Set the strategic objectives of the Trust and Academies	Determine	Develop In the case of academies in consultation with LGB and Principal	Recommend	Consult In their academy
Deliver strategic objectives of the Trust & Academies	Review	Deliver	Review	Deliver
Review and challenge progress of the Trust against its strategic objectives	Review	Report & Review Review reports from LGB and report to Trustees	Review & Report Review reports from Principal and report to EP	Report
Compliance with Funding Agreement and the Academies Financial Handbook	Review	Deliver	Comply	Comply
Compliance with all Regulations and Law (including charity law, company law, employment law and health and safety legislation)	Review	Deliver & Report To Board	Review	Deliver & Report To LGB and EP
Compliance ensuring that there are appropriate financial controls in place so that there is regularity, probity and value for money in relation to the management of public funds	Determine & Review Through policies and procedures	Deliver & Report To Board	Review	Deliver & Report To LGB and EP



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Compliance in completing the register of business interests and deal with any conflicts of interest and connected party transactions through policy and procedure	Determine and Deliver		Deliver	
Appointment of Trustees and Governors through correct processes in place	Determine & Review Through policies and procedures and self evaluation of Trust and LGB performance	Report, Review & Recommend Report performance of LGB to Trustees. Review skills through a skills audit and recommend any changes	Review Through election procedures	
Appointment of the Responsible Officer (RO)	Deliver Appoint RO	Deliver For each individual academy		
Appointment of Trustee and LGB Clerk	Deliver		Consult	Consult
Approval of Trust wide policies	Deliver	Develop	Deliver	
Approve proposed Academies wishing to join the Trust	Deliver	Review and Recommend		

2. Education and Curriculum	Trustees	Executive Principal	LGB	Principal
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Academy Development Plan for each individual Academy in line with strategic aims of the Trust	Determine	Deliver & Review Drafting and agreeing the Academy Development Plan	Recommend	Deliver & Review Drafting and agreeing the Academy Development Plan
Setting and reviewing targets of the Trust and Academies	Determine & Review Set Trust and Academy targets and review performance against KPI	Consult Liaise with LGBs and propose targets to Trustees	Recommend, Review & Deliver Targets for performance for the Academy. LGB should hold leadership to account relating to targets	Deliver & Report Performance of the Academy against targets
Quality of teaching – supportive, challenge and intervention to support the delivery of education outcomes	Review	Deliver Through supporting Academies where appropriate	Review	Review & Report Through teaching and learning objectives and report strengths and concerns to LGB
Overall implementation of the national curriculum for Academies and reviewing overall effectiveness	Review	Deliver & Recommend	Consult & Review	Deliver
Pupil Premium (PP) – reviewing and challenging in terms of educational outcomes and narrowing the gap	Review	Report To Trust board effectiveness of PP across Trust	Determine & Review How PP is spent	Deliver & Report Effectiveness of PP



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Admissions Decisions			Deliver	Consult
Student Issues	Review	Review	Review & Report	Deliver & Report
Setting Academy hours, term dates and length of school day	Determine Consultation with LGBs		Consult Consultation with Trustees	Comply
School lunches deliver to appropriate nutritional standards			Review	Deliver

3. Finance and Governance	Trustees	Executive Principal	LGB	Principal
Agreement of Model Funding Agreement for the Trust and develop model funding agreement for Academies	Determine In consultation with LGBs	Recommend & Review Model funding agreement to the Board for approval	Consult & Review With the Trustees and review compliance with the overall financial plan for the Academy	Comply
Agree the Annual Budget for the Trust	Determine	Deliver & Review Submission of budget to EFA		



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Academy Annual Budgets including uses of contingency funds / balances	Determine	Deliver & Review Preparation of Academy budgets in consultation with LGBs and deliver to the Trustees.	Consult & Comply With EP In respect of the Academy's requirements	Deliver & Comply
Expenditure and ensuring delivery of Annual Budgets	Review	Report Delivery against annual Academies budgets and report matters in connection with compliance	Review & Report To EP issues with expenditure or compliance	Report To LGB matters of concern in respect to Academy budgets
Financial reporting	Determine	Deliver	Review	Deliver
Delegated Budgets and Finance in the form of scheme of delegation of financial authority to Academies	Determine	Deliver & Review Recommend financial limits to Trustees and review effectiveness of limits	Review & Comply	Comply
Compliance through establishing Trust financial policies and procedures to ensure financial reporting and requirements are met	Determine	Review & Report Compliance with policies and report non compliance to Trustees	Review & Report Compliance with policies and report non compliance to EP	Deliver Compliance with financial policies



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Approving annual accounts	Approve	Deliver Arrange for auditing and filing of annual reports and accounts	Comply Keep appropriate records in respect of Academy and provide information to assist the Trust in preparation of the annual accounts	
Trust risk register	Review	Deliver Management of Trust risk register	Review Academy risk register	Deliver Management of Academy risk register
Agree investments through policy and procedures that complies with the Financial Handbook	Determine & Review	Deliver		

4. Business and Human Resources	Trustees	Executive Principal	LGB	Principal
Appointing the EP	Appoint			
Appointing Principals at each Academy	Approve In consultation with the EP/ LGBs	Recommend Sit on recruitment panel along with two representatives of the relevant LGB	Recommend Two representatives of the relevant LGB sit on recruitment panel along with EP	



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Appointing of cross Trust staff in line with recruitment policy	Review	Appoint & Report		
Appointing Academy staff		Appoint in consultation with Principal	Appoint in consultation with Principal	Recommend
Establish Trust wide HR Policies	Determine & Review	Comply	Review	Comply
Setting performance management policy together with pay reviews in line with Trusts pay policy and all statutory regulations	Review Any appeals in respect of Principals and cross academy staff. Review EP performance	Review & Report In respect of all staff including cross Trust staff and any appeals of Academy staff. Report to Trustees	Comply, Review & Report	Comply, Review & Report
Setting terms and conditions of employment and Staff Handbook	Determine	Recommend	Comply	Comply
Dismissing EP, Principals, senior/ cross Trust staff in accordance with policy and procedure	Review & Deliver In respect of EP	Review & Deliver In respect of Principals and cross Academy staff. Inform Trustees of dismissals	Review and Deliver In respect of the Principal of Academy	Review & Deliver In respect of senior staff
Dismissing all other staff in accordance with policy and procedure		Review & Report Report to Trustees	Review & Report Report to EP	Comply



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Setting Trust wide procurement policies	Determine	Deliver	Comply	Comply
Setting Academy specific procurement policies	Determine	Review	Deliver	Recommend
Determining and allocating Central Services to be provided to the Academies by the Trust	Determine	Deliver	Consult	Consult
Overseeing the effectiveness of Central Services provided by the Trust	Review	Deliver & Report	Report	
Asset and Premises Maintenance Strategy by determining use of Academies' premises and ensuring premises are adequately maintained	Determine Trust wide policy	Recommend	Determine & Review	Deliver
Acquiring and disposing of trust land	Deliver	Recommend		
Changing use of assets	Deliver		Recommend Changes to fixed assets used by Academy	
Arranging insurance for the Trust	Review	Deliver		
Media and PR to project activities of the Trust and the Academies to the wider community	Review	Deliver Trust wide activities	Comply	Comply
Academy prospectus		Review	Deliver	Recommend
Trust prospectus and website	Review	Deliver		