



Scheme of Delegation

July 2026

This Scheme of Delegation should be read alongside the Trust's Articles of Association, Funding Agreement, Academy Trust Handbook, Financial Scheme of Delegation, Board Committee Terms of Reference, Local Assurance Committee Terms of Reference, Trust Policy Matrix, Governance Oversight and Assurance Framework and School Assurance Dashboard.

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Introduction

The Board of Trustees of Soke Education Trust is legally accountable for the conduct, performance and strategic direction of the Trust and all schools within it.

The Trust Board retains ultimate accountability for the Trust's statutory functions, educational standards, safeguarding, financial oversight, risk management and compliance. However, the Board is not required to carry out all governance and operational functions directly. The Board may delegate authority to Board Committees, the Chief Executive Officer, Executive leaders, Headteachers and Local Assurance Committees, as set out in this Scheme of Delegation.

Delegation does not remove Trustee accountability. The Trust Board remains responsible for ensuring that delegated functions are exercised effectively, lawfully and in accordance with the Trust's Articles of Association, Funding Agreement, Academy Trust Handbook, policies and approved governance framework.

Purpose of the Scheme of Delegation

This Scheme of Delegation defines how accountability, delegated authority, responsibility and assurance operate across Soke Education Trust.

It is intended to ensure that Members, Trustees, Board Committees, Executive leaders, Headteachers, Local Assurance Committees and Governance Professionals are clear about their respective roles and responsibilities.

The Scheme of Delegation sets out:

- which decisions are reserved to Members and the Trust Board;
- which functions are delegated to Board Committees;
- the authority delegated to the Chief Executive Officer and Executive leaders;
- the responsibilities of Headteachers in leading and managing their schools;
- the role of Local Assurance Committees in providing local assurance, stakeholder visibility and contextual intelligence;
- the role of Governance Professionals in supporting effective governance, compliance and coherence across the Trust;
- how assurance, scrutiny and escalation operate across the governance structure.

The Scheme of Delegation should be used to support clear, consistent and proportionate decision-making. It should also ensure that governance activity is purposeful, strategically aligned and avoids unnecessary duplication between governance layers.

The Trust Board will review this Scheme of Delegation annually and may amend it at any time in response to changes in Trust structure, statutory requirements, risk, school performance, governance effectiveness or operational need.

Governance Principles

Soke Education Trust's governance arrangements are based on the following principles.

1. Trustees retain ultimate accountability

The Trust Board is legally accountable for the Trust and all schools within it. Where authority is delegated, the Trust Board remains responsible for ensuring that delegated functions are exercised effectively, lawfully and appropriately.

2. Governance is strategic, not operational

Governance within the Trust is concerned with strategic direction, oversight, assurance, accountability, risk and compliance. Operational leadership and day-to-day management are the responsibility of the Chief Executive Officer, Executive leaders and Headteachers.

3. Accountability and delegated authority must be clear

The Trust's governance structure must make clear who is accountable, who has authority to approve decisions, who is responsible for delivery, who must be consulted, who provides assurance and how concerns are escalated.

4. Assurance should be connected and proportionate

Assurance activity across the Trust should be connected, purposeful and proportionate. Board Committees provide focused scrutiny, challenge and delegated decision-making where authorised. Executive leaders provide operational and school improvement assurance. Local Assurance Committees provide local assurance, stakeholder visibility and contextual intelligence. The Trust Board retains strategic oversight and accountability.

5. Delegation may vary according to risk and context

The Trust Board may amend, suspend, withdraw or vary delegated authority where necessary, including in response to school performance, safeguarding, compliance, finance, leadership capacity, governance effectiveness, external review findings or any other material risk to the Trust.

Governance Structure

Soke Education Trust operates through a layered governance and executive leadership structure.

The **Members** sit above the Trust Board and hold Trustees to account for the effective governance of the Trust.

The **Trust Board** is the legally accountable body and retains strategic oversight of the Trust and all schools within it.

The Trust Board may delegate functions to Board Committees, the Chief Executive Officer and Local Assurance Committees, as set out in this Scheme of Delegation and the relevant Terms of Reference.

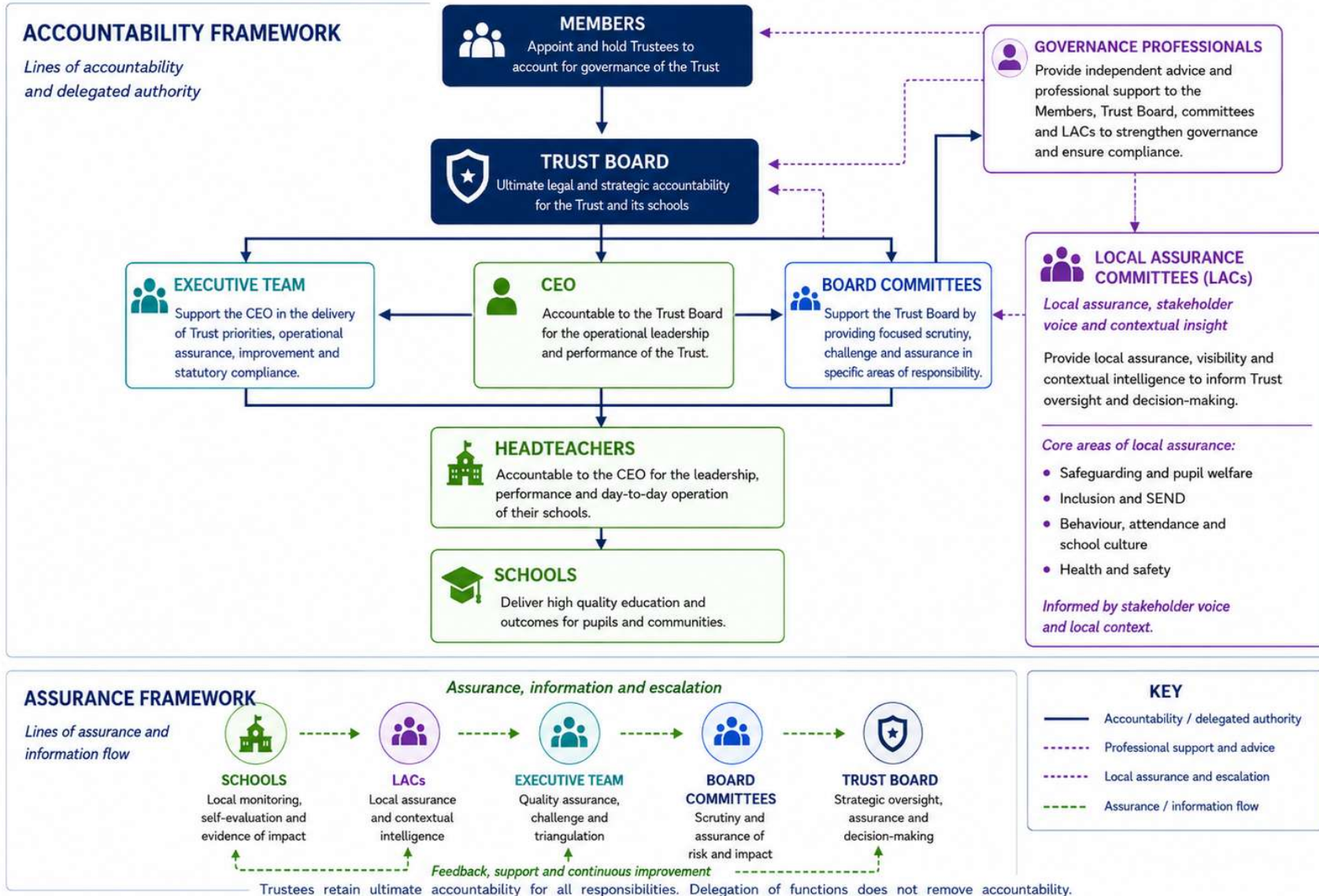
The **Chief Executive Officer** is accountable to the Trust Board for the operational leadership and management of the Trust. Executive leaders and Headteachers operate within the executive leadership structure and are responsible for delivery, implementation and school improvement.

Board Committees provide focused scrutiny, challenge, assurance and delegated decision-making where authorised by the Trust Board.

Local Assurance Committees form the local governance and assurance layer of the Trust. They provide local assurance, stakeholder visibility and contextual intelligence to support Trustee oversight.

Governance Professionals provide professional advice, support and coordination across the Trust's governance structure, including support to Members, Trustees, Board Committees, Local Assurance Committees and the Chief Executive Officer.

Governance Structure: Accountability and Assurance



How to Read the Scheme of Delegation

The delegation matrix sets out where accountability, approval, responsibility, consultation and assurance sit across the Trust.

The Scheme of Delegation should be read using the key below.

Code	Meaning	Definition
A	Accountable / Approves	Has authority to approve the decision and is answerable for it. There should usually be only one accountable person or body for each decision.
R	Responsible	Leads, develops, delivers or implements the work. Responsibility may be shared where appropriate.
C	Consulted	Must be consulted before a decision is made. Consultation should take place early enough to inform the decision.
S	Scrutiny / Assurance	Provides scrutiny, challenge, monitoring or assurance. This may include reviewing evidence, testing whether systems are effective, identifying risks and escalating concerns.

Where a function is delegated, the Trust Board retains ultimate accountability for ensuring that the function is carried out effectively, lawfully and appropriately.

Where the matrix refers to **Board Committees**, the relevant committee will be determined by the committee Terms of Reference.

Where the matrix refers to **Executive leaders**, this means members of the Trust's executive leadership structure acting within their agreed remit.

Where the matrix refers to **Local Assurance Committees**, their role should be read alongside the Local Assurance Committee Terms of Reference and the Trust's Oversight and Assurance Framework.

Where there is uncertainty about interpretation, the matter should be referred to the Governance Professionals, Chief Executive Officer or Chair of Trustees as appropriate.

NB

For ease of use, the codes can be also understood as follows:

A = accountable for it

R = makes it happen

C = is asked before it happens

S = checks, challenges and seeks assurance

Delegation Matrix

1. Governance and Constitutional Matters

A – Accountable / Approves		R – Responsible		C – Consulted		S – Scrutiny / Assurance		
Function / decision	Members	Trust Board	Board Committees	CEO	Executive Leaders	Governance Professional	LACs / LAC Chairs	Headteachers
Amend the Articles of Association, where permitted	A	R				R		
Appoint or remove Members	A					R		
Appoint or remove Member-appointed Trustees, in accordance with the Articles	A					R		
Appoint or remove co-opted Trustees, where permitted		A				R		
Elect Chair and Vice Chair of Trustees		A				R		
Appoint external auditors	A	R	S			R		
Approve Trust governance structure		A		R		R		
Approve and Review Scheme of Delegation		A		R		R		
Approve Board Committee Terms of Reference		A	C			R		
Approve Local Assurance Committee Terms of Reference		A		R		R	C	
Appoint or remove Board Committee Chairs and members		A	C			R		
Appoint LAC Chairs		C		C		R	A	
Remove or replace LAC Chairs		A		R				
Appoint or remove LAC members		A		R		R	R	
Ensure parent representation requirements are met		A				R		R
Appoint Governance Professionals		A		R				
Agree annual schedule of Trust Board and committee meetings		A	C			R		
Agree annual schedule of LAC meetings		A		C		R	C	C
Agree LAC agendas in line with Trust governance cycle				C		R	C	C
Maintain governance records, including attendance, declarations and terms of office		A				R		
Maintain GIAS and Companies House governance information		A				R		
Publish governance arrangements on Trust and school websites		A				R		R
Commission external review of Trust governance	C	A		R		R		
Commission external review of local governance		A		R		R	C	C
Evaluate effectiveness of Trust governance	C	A				R		
Evaluate effectiveness of local governance		A		R		R	C	
Approve governance training and induction framework		A				R		

2. Strategy, Improvement and Assurance

A – Accountable / Approves		R – Responsible		C – Consulted		S – Scrutiny / Assurance		
Function / decision	Members	Trust Board	Board Committees	CEO	Executive Leaders	Governance Professionals	LACs / LAC Chairs	Headteachers
Determine Trust vision, values and strategic priorities		A		R				
Approve Trust strategic plan and annual priorities		A		R				
Lead implementation of Trust strategic priorities				A	R			R
Set school-level priorities aligned to Trust strategy and context			S	A	R		S	R
Approve the Trust Oversight and Assurance Framework		A		R		R		
Approve the School Assurance Dashboard approach		A		R	C	R	C	C
Maintain and update School Assurance Dashboards			S	A	R		S	R
Undertake executive quality assurance and school improvement review activity			S	A	R			C
Agree annual LAC assurance priorities in line with Trust priorities and local context				A		R	C	C
Undertake LAC local assurance activity in agreed priority areas						R	S	C
Escalate significant local risks or concerns where assurance cannot be secured			S	A	R	R	S	R
Approve school improvement intervention or additional executive oversight where required			S	A	R			C
Approve variation, suspension or withdrawal of delegated authority where required		A		R		R		
Monitor impact of Trust strategy, school improvement and assurance activity		A	S	R	R			
Report annually to Members on Trust performance and governance effectiveness	S	A		R		R		

3. Education, Safeguarding and Pupil Experience

A – Accountable / Approves		R – Responsible		C – Consulted			S – Scrutiny / Assurance		
Function / decision	Members	Trust Board	Board Committees	CEO	Executive Leaders	Governance Professional	LACs / LAC Chairs	Headteacher	
Education, curriculum and standards									
Approve Trust curriculum policy and educational standards framework		A	S	R	R				
Ensure school curriculum implementation is broad, balanced and aligned to the Trust framework			S	A	R			R	
Monitor educational performance, outcomes and standards across the Trust			S	A	R				
Report headline school performance, priorities and assurance information through agreed routes				A	R		S	R	
Safeguarding and pupil welfare									
Approve Trust safeguarding and child protection policy		A	S	R	R				
Ensure safeguarding arrangements comply with statutory guidance and Trust policy			S	A	R		S	R	
Appoint or confirm Trust safeguarding lead arrangements				A	R				
Appoint school Designated Safeguarding Lead and deputy DSL arrangements					S			A	
Provide local safeguarding assurance through agreed LAC activity							S	R	
SEND, inclusion and pupil welfare									
Approve Trust SEND and inclusion policy framework		A	S	R	R				
Ensure SEND and inclusion arrangements comply with statutory requirements			S	A	R		S	R	
Appoint school SENCO arrangements					S			A	
Monitor pupil welfare, inclusion and stakeholder experience			S	A	R		S	R	
Behaviour, attendance, culture and exclusions									
Approve Trust behaviour, attendance and pupil welfare policy framework		A	S	R	R				
Implement behaviour, attendance and pupil welfare policies at school level				S	S			A	
Monitor Trust-wide attendance, behaviour, suspension and exclusion trends			S	A	R				
Provide local assurance on behaviour, attendance, culture and pupil experience							S	R	
Decide to suspend or permanently exclude a pupil in line with statutory guidance								A	
Convene and support statutory review panels for suspension and permanent exclusion decisions		A				R	S		
Monitor compliance with statutory guidance on suspensions and permanent exclusions			S	A	R				
Stakeholder voice and local insight									
Gather and respond to parent, pupil and staff voice through agreed routes				S	S		S	A	
Ensure stakeholder voice and local insight inform assurance reporting			S	A	R		S	R	

4. Finance, Risk and Operations

A – Accountable / Approves		R – Responsible		C – Consulted			S – Scrutiny / Assurance		
Function / decision	Members	Trust Board	Board Committees	CEO	Executive Leaders	CFO / Finance Lead	Operations / Estates Lead	LACs / LAC Chair	Headteacher
Finance strategy, budgeting and reporting									
Approve financial strategy, reserves policy and budget-setting principles		A		R		R			
Approve annual Trust budget and financial forecasts		A		R		R			
Approve school-level budgets within the Trust budget-setting process		A		R		R			C
Monitor Trust financial performance, management accounts and budget position			S	A		R			
Monitor school-level financial performance and budget position			S	A		R			R
Approve annual report and accounts		A	S	R		R			
Financial controls, audit and compliance									
Approve Financial Scheme of Delegation and financial regulations		A	S	R		R			
Ensure compliance with Academy Trust Handbook financial requirements		A	S	R		R			
Submit required financial returns and reports to DfE / ESFA and other statutory bodies				A		R			
Approve internal scrutiny programme and audit plan			S	R		R			
Review internal scrutiny, external audit findings and management responses			S	R		R			
Approve financial decisions, procurement, contracts, write-offs and exceptional payments		A	S	R		R			
Risk management and value for money									
Approve Trust risk management framework and risk appetite		A	S	R	C	C			
Maintain and report on the Trust risk register and risk mitigation activity			S	A	R	R			
Monitor material risks, controls and value for money across the Trust		A	S	R		R			
Estates, premises and capital planning									
Approve Trust estates strategy and asset management approach		A	S	R			R		
Approve annual capital, maintenance and premises priorities			S	A			R		C
Identify school-level premises condition needs, site priorities and local risks							R	S	R
Monitor delivery and impact of approved capital, maintenance and premises programmes			S	A			R		C
Approve significant change of use, acquisition or disposal of land or buildings, subject to DfE requirements		A		R			R		C
Health and safety and business continuity									
Approve Trust health and safety policy and compliance framework		A	S	R			R		
Ensure effective health and safety management systems and statutory compliance			S	A			R	S	R
Maintain school-level health and safety arrangements, risk assessments and local compliance checks							S	S	A
Escalate material health and safety risks, non-compliance or unresolved premises concerns				A			R	S	R
Approve Trust-wide business continuity and critical incident framework		A	S	R	R		R		
Maintain school-level business continuity and emergency site procedures				A			R	S	R

5. People, Pay and HR

A – Accountable / Approves		R – Responsible		C – Consulted		S – Scrutiny / Assurance		
Function / decision	Members	Trust Board	Board Committees	CEO	Executive Leaders	Governance Professionals	LACs / LAC Chairs	Headteachers
People strategy, policy and pay								
Approve Trust-wide people / HR strategy		A	S	R	R			
Approve Trust-wide pay policy and appraisal framework		A	S	R	R			
Approve annual pay award, where Trust approval is required		A	S	R	R			
Approve and maintain HR policies		A	S	R	R			
Ensure consistent implementation of Trust people, pay and HR policies				A	R			R
Staffing structures and appointments								
Approve Trust central staffing structure		A	S	R	C			
Approve school staffing structure within agreed budget and Trust parameters				A	R			R
Approve material staffing changes outside agreed budget or staffing structure		S	C	A	R			C
Appoint the Chief Executive Officer		A						
Appoint Executive Team members		S		A	R			
Appoint Headteachers		A		R	R		C	
Appoint school senior leaders				C				A
Appoint teaching and support staff within agreed budget and staffing structure								A
Performance management and remuneration								
Performance manage the Chief Executive Officer		A						
Approve Chief Executive Officer remuneration and pay progression		A	S					
Performance manage Executive Team members				A				
Approve Executive Team remuneration and pay progression		S	A	R				
Performance manage Headteachers		S		A	R			
Approve Headteacher remuneration and pay progression		S	A	R				
Approve staff appraisal and pay progression processes for school staff			S	A	R			R
Formal HR processes, panels and employment decisions								
Undertake formal HR processes relating to the Chief Executive Officer		A						
Undertake formal HR processes relating to Executive Team members or Headteachers			S	A	R			
Undertake formal HR processes relating to school staff				S	R			A
Arrange or support formal panels or appeal panels where required by HR policy				A	R	R		
Approve restructuring, redundancy or formal consultation programmes		S	C	A	R			C
Approve settlement agreements, special severance or compensation payments in line with policy and DfE requirements		S	A	R	R			

6. Policies, Compliance and Statutory Functions

A – Accountable / Approves		R – Responsible		C – Consulted		S – Scrutiny / Assurance		
Function / decision	Members	Trust Board	Board Committees	CEO	Executive Leaders	Governance Professional	LACs / LAC Chairs	Headteacher
Policy framework and statutory compliance								
Approve policy framework and policy approval schedule		A		R		R		
Approve statutory Trust-wide policies in line with the policy schedule		A	S	R	R			
Approve non-statutory Trust-wide policies where Board approval is not required				A	R			
Approve school-level policies where expressly delegated through the Trust Policy Matrix						R	A	R
Ensure Trust policies are implemented consistently across schools				A	R			R
Maintain central policy review cycle, version control and publication process				A	R	R		
Monitor compliance with statutory policies and procedures		A	S	R	R		S	R
Admissions, complaints and panels								
Approve admissions policy and admission arrangements where the Trust is the admissions authority		A		R	R			C
Implement admissions arrangements and in-year application processes				A	R			R
Arrange independent admission appeals where required				A		R		C
Approve Trust complaints policy		A		R		R		
Manage complaints at informal and formal stages in line with policy				A	R			R
Convene and support complaint panels where required by policy				A		R	C	C
Information governance, cyber and statutory publication								
Approve data protection, FOI and information governance policy framework		A	S	R	R			
Ensure compliance with GDPR, FOI, subject access and records management requirements				A	R	R		R
Approve Trust cyber security and IT policy framework		A	S	R	R			
Monitor cyber security, data protection and information governance assurance		A	S	R	R			
Maintain Trust and school website statutory information		A		R		R		R
Submit statutory returns and compliance information to external bodies				A	R	R		R
External liaison, communications and reputation								
Approve communications with DfE, ESFA, Ofsted, local authorities or regulators on material Trust matters				A	R			
Manage external communications and reputation risk in line with Trust policy				A	R			R
Escalate statutory compliance, policy, publication, data protection, cyber or reputation risks		S	S	A	R	R	S	R