



Scheme of Delegation

2026/2027

Approved by:	Board of Trustees	Date: 9 th July 2026
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Last reviewed on:	1 st June 2026 – For implementation 2026/2027
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Next review due by:	8 th July 2027
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Our Mission

As a Trust, we strive to create an inclusive environment that values diversity and equality, where all beliefs are respected. We are committed to providing our children with an exceptional education, inspiring them to cultivate a love of learning and empowering them with a strong foundation to thrive and accomplish their goals in life.

Our Vision and Values

Vision: Working together, we enable everyone to flourish together through high quality education.

Values: Courage - Unity - Equity

1. Introduction

Orchard Community Trust is a single legal entity. It is a charitable company limited by guarantee, governed by a Board of Trustees who are responsible for, and oversee, the strategic control, management and administration of the Trust and all of its academies. The Trustees are accountable to external government agencies including the Department for Education (DfE) and Charity Commission for the quality of the education they provide and they are required to have systems in place through which they can assure themselves of quality, safety and good practice.

However, this does not mean that the Board is required to carry out all the Trust's governance functions and many can and should be delegated, including to the Chief Executive Officer and other Executive Leaders, Headteachers, Schools, Trust Board Committees and Local Governing Boards. The decision to delegate a function is made by the Board of Trustees at their sole discretion and is recorded. Without such delegation, the Committee or individual has no power to act.

The Scheme of Delegation is the key document defining the lines of responsibility and accountability in our Trust. It is a simple yet systematic way of ensuring that the Members, Trustees, Board Committees, Trust and School Leaders are all clear about their roles and responsibilities to ensure the success of the Trust and its academies. It takes into account the Master Funding Agreement, Supplemental Funding Agreements, Corporate and Charity law, the Academy Trust Handbook, CIPFA guidance and other DfE guidance.

Related Governance Documents

This Scheme of Delegation should be read alongside the following Trust governance and operational documents:

- Articles of Association
- Trust Board and Committee Terms of Reference
- Financial Regulations
- Board Assurance Framework and Risk Register
- Governance Code of Conduct
- Trust Strategic Plan.

Collectively, these documents provide the governance, accountability and operational framework for Orchard Community Trust.

2. Summary of Governance Structure

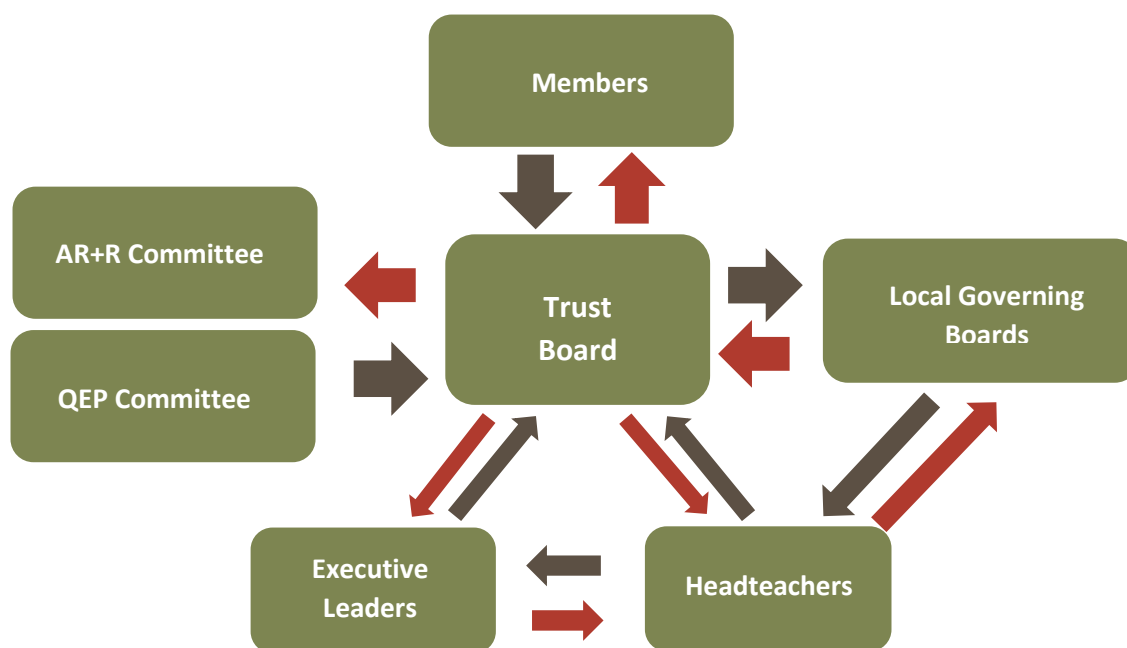
Within our Trust, the purpose of governance is to provide:

- **Strategic leadership** - *the Board defines the Trust vision for high quality and inclusive education in line with its charitable objects. It establishes and fosters the Trust's culture and sets and champions the Trust strategy including determining what, if any, governance functions are delegated to the local tier*
- **Accountability and assurance** - *the Board has robust effective oversight of the operations and performance of the Academy Trust, including the provision of education, pupil welfare, overseeing and*

ensuring appropriate use of funding and effective financial performance and keeping their estate safe and well maintained

- **Strategic engagement** - the Board has strategic oversight of relationships with stakeholders. The Board involves parents, academies and communities so that decision-making is supported by meaningful engagement.

Orchard Community Trust's governance structure can be illustrated by the following diagram:



3. Members

Trusts are founded by members who have a general duty to exercise their powers to further the Trust's charitable object which is "to advance for the public benefit, education in the United Kingdom". Members' powers are set out in the Trust's Articles of Association and in company law. They determine the Trust's constitution and governance structure, appointing, and removing Trustees and hold the Trust Board to account in relation to the governance and operation of the Trust. The Members operate independently of the Trustees and have a financial liability to the Trust in the event that it is wound up. The members must also ensure that the religious character of the church academies within the Trust is preserved and developed.

4. Trust Board

The Trust is a charitable company and so Trustees are both charity Trustees (within the terms of section 177(1) of the Charities Act 2011) and Company Directors. Trustees are bound by both charity and company law. The Trust Board is legally responsible and accountable to the Department for Education (DfE).

The Trust Board has collective accountability and strategic responsibility for the Trust. It has a focus on ensuring the Trust delivers an excellent education to pupils while maintaining effective financial management and must ensure compliance with:

- the Trust's charitable objects
- regulatory, contractual and statutory requirements
- their funding agreement.

The Trust Board also has:

Strategic and statutory responsibility for safeguarding and special educational needs and disabilities (SEND) arrangements within (and across) the Academy Trust ensuring the promotion of pupil welfare and for keeping their estates safe and well-maintained:

- a role in making sure that it delivers its commitment to other schools and academies, however it is done.

The Trust Board can delegate most operational matters. It can also delegate aspects of decision-making to a committee, but it cannot delegate responsibility and must retain overall control.

The Trust Board will ensure that governance activity remains strategic, proportionate and focused on assurance rather than operational management. Trustees should avoid unnecessary duplication of school leadership activity and instead obtain assurance through executive reporting, Local Governing Boards, strategic visits, internal scrutiny, audit activity and other agreed assurance mechanisms.

Trust Board Chair's actions between meetings

Trustees agree to allow the Trust Board Chair to take action when:

- it is not possible to call a Trust Board or committee meeting before the decision has to be made
- not to act would be seriously detrimental to the interests of the Trust or/and its Academies, the pupils, their parents/carers, or anyone employed by the Trust
- it would not be possible to postpone a decision until a meeting of the Trust Board.

The use of Chair's action must be compliant with the Trust's financial regulations. Delegated decisions taken by the Chair should be reported in writing to the Trustees as soon as possible and recorded in Board minutes.

5. Trust Board Committees

The Trust Board is supported by two committees. These are the **Audit, Risk and Resources Committee (ARR)** and the **Quality of Education and Provision Committee (QEP)**.

The committees' specific function is to support the Trust Board, CEO and relevant members of the Executive Leadership Team in their responsibilities for the educational performance of the Trust and its pupils in the context of the Trust's strategy.

The Audit, Risk and Resources Committee (ARR) advises on the adequacy and effectiveness of the Trust's systems of internal control, audit arrangements, risk management, governance and compliance processes/procedures. The committee will have financial oversight in securing economy, efficiency, and effectiveness (value for money) whilst ensuring Trust compliance with its policies and procedures is working effectively. It supports the Board in maintaining the Trust as a going concern. Resources within the MAT constitute finance, estates, and material items including IT and its infrastructure. Therefore this committee is responsible to oversee the development of the Trust's estates strategy including health and safety, its IT strategy and deployment of its digital infrastructure so that they reflect the Trust's current and future educational requirements.

The Quality of Education and Provision Committee comprises of 2 distinctive elements of focus:

- 1) Ensures the oversight of standards (education based) within Orchard Community Trust which encompasses curriculum, data, safeguarding, attendance, SEND, SMSC, HR and Christian Distinctiveness (where applicable)
- 2) Ensures an effective and supportive workforce is employed at all levels across the Trust.

5.1 Local Governing Boards

A Local Governing Board (LGB) is a 'committee' of the Trust Board that is established under the Trust's Articles of Association. Each LGB is made up of representatives from the schools and their local communities, including two

elected parent governors. Within our Church of England Schools, the LGB will also consist of at least two foundation governors. These individuals have a special responsibility to preserve the religious character of the school.

At school level, the Local Governing Board will monitor and understand how the school is led and managed in accordance with the powers delegated to it. It will provide a vehicle for Trust Board engagement of the school, its pupils, parents/carers and the local community. It serves to ensure that Trustees stay informed, providing vital local intelligence and feedback, reflecting positive factors as well as challenges and threats facing each community.

Local Governing Boards provide local assurance, stakeholder engagement and community intelligence to support effective governance across the Trust.

Whilst certain responsibilities may be delegated to Local Governing Boards, legal accountability for all academies within Orchard Community Trust remains with the Trust Board at all times. Local Governing Boards therefore operate within the framework determined by the Trust Board and this Scheme of Delegation.

The LGB Role will primarily focus upon:

- Local stakeholder engagement
- Community intelligence
- Local challenge and support
- School culture and ethos
- Monitoring implementation
- Escalation of local concerns.

LGBs should not duplicate:

- Executive operational management
- Internal scrutiny functions
- Professional school improvement processes
- Trust-wide strategic decision-making.

More detail on the role and responsibilities of each of the Trust Board committees can be found under the relevant Committee Terms of Reference.

6. Executive Leaders

These are the members of the Central Team responsible for the operational running of the organisation, supporting individual schools with operational matters to meet both the core object of the Trust and to achieve strategic targets as set by the Trust Board.

The membership of the Executive Team includes the Chief Executive Officer/Accounting Officer, Deputy CEO, Chief Financial Officer and Chief Operations Officer. The Trust Board appoint the Chief Executive (CEO), to whom it delegates responsibility for delivery of the vision and strategy of the Trust. The CEO is held to account for the conduct and performance of the Trust, including the performance of the schools within the Trust, and for financial management. The CEO is the Accounting Officer so has overall responsibility for the operation of the Trust's financial responsibilities and must ensure that the organisation is run with financial effectiveness and stability, avoiding waste and securing value for money. The CEO leads the Executive Team, Headteachers/Executive Headteachers and the wider central team.

6.1 Headteachers

The School Headteachers/Executive Headteachers are responsible for all aspects of the day to day running of their setting and operational delivery of school strategic improvement plans. Headteachers/Executive Headteachers share information about the school with the LGBs so that Governors build an understanding about how the school operates and are enabled to monitor and scrutinise how key policies and improvement plans are working in practice.

7. Governance Support

Every Trust Board must have a Governance Professional, who is someone other than a Trustee, Headteacher or Chief Executive Officer of the Trust. The role is a discrete and independent function who receives direction from and remains accountable to the Trust Board. The role of the Governance Professional is to:

- provide independent governance advice, guidance and effective administrative support to the Trust Board
- support the Trust Board to meet high standards of governance, including fulfilling legal or regulatory requirements and decision-making
- help the Trust Board to understand its role and legal duties
- support the Trust Board Chair to facilitate strategic debate and decision-making
- promote the flow of information throughout the governance structure, including between the Trust Board, its committees including Local Governing Boards and Members.

8. Delegation

In addition to the delegations set out in this document, some functions may be further delegated, for example by the Chief Executive Officer to members of the Executive Team or from one of the School Headteachers to senior school staff. The Trust Board retains overarching responsibility for all decisions made.

For the avoidance of doubt, where a power is not expressly delegated by the Trustees it will be deemed to have been retained by the Trustees regardless of whether it is, or is not, specified in the Scheme.

9. Approval and Renewal

The Trust Scheme of Delegation will be renewed at least annually so that the roles and responsibilities outlined continually reflect the Trust's organisational structure.

10. Relationship to the Board Assurance Framework (BAF)

Orchard Community Trust operates an integrated governance and assurance model through its Board Assurance Framework (BAF).

The Scheme of Delegation supports the Trust's governance arrangements by clearly identifying accountability, responsibility and oversight across all levels of the organisation.

The delegated responsibilities within this document contribute directly to the mitigation and oversight of strategic risks identified within the Trust's Board Assurance Framework, including but not limited to:

- R1 – Effective Governance
- R2 – Compliance and Statutory Responsibility
- R4 – Strategy and Leadership
- R5 – Risk Management and Internal Control
- R7 – Financial Sustainability
- R9 – Estates, Health & Safety and Infrastructure .

Committees, Executive Leaders, Local Governing Boards and School Leaders are expected to discharge their delegated responsibilities in a manner that strengthens assurance against strategic risks.

11. Scheme of Delegation Matrix 2026 - 27

The Department for Education has published 5 pillars of academy trust quality which cover:

1. High-quality and inclusive education
2. School improvement
3. Workforce
4. Finance and operations
5. Governance and leadership.

The Scheme of Delegation is aligned to the Department for Education's five pillars of academy trust quality, with governance and leadership providing the overarching accountability framework through which educational performance, workforce, finance, operations and school improvement are strategically overseen.

Key:

A	Accountable	This is usually the Trust Board as the legally accountable and liable body: there is only one person/group accountable for each item.
R	Responsible	Responsible for delivering the area of activity/decision in line with agreed policies. Several individuals/bodies can be either jointly responsible or solely responsible for delivering a specific aspect of the task. For example, while one person may be responsible for delivering an objective, others may be responsible for monitoring or scrutinising that delivery or preparing information and reports.
C	Consulted	Consulted on the area of activity/decision and entitled to give/receive feedback. While those responsible and accountable are not obliged to accept the views put forward, they must be actively considered.
I	Informed	Informed of the area of activity/decision through agreed communications channels. They need updates on progress or decision, but they do not need to be formally consulted, nor do they contribute directly to the task or decision. No feedback is required from this tier of governance.

Link to Trust Quality Descriptor Leadership and Governance		Members	Trust Board	ARR	QEP	CEO	Exec	LGB	Head/Exec Head
Culture and Engagement	Set the Trust vision	I	A/R			R	I	C	R
	Set the culture and values of the Trust fostering the individuality of each School	I	A/R			R		R	R
	Create and maintain a Code of Conduct for all levels of Governance		A/R			R		R	R
	Foster Equality, Diversity and Inclusion – including building a diverse board, compliance with Personal, Social, Emotional Development and publication of equality objectives		A			R		R	R
	Ensure up to date Trust Governance details (and Executive Leaders' information where required) are published on Get Information about Schools, Companies House and the Trust and School websites		A			R			
	Ensure up to date LGB members' details are published on Get Information About Schools and the School websites		A					R	R
	Ensure engagement with stakeholders and religious authorities		A			R		R	R
Governance of the Trust	Hold Trustees to account for achieving the Trust's objectives, effective governance and working within the law and any guidance on the governance of Trusts	A/R							
	Regularly review and adhere to the Articles of Association	A/R	R			R (Via GP)			
Strategy	Approve, champion and review the Trust's strategy and key priorities	I	A			R		I	I
	Agree and review the progress of the Trust's Strategic and Operational Plan including growth model		A			R			
	Ensure Strategic Development Plans (School Level) are in place in line with Trust priorities and regularly reviewed		A		R	R		R	R

Link to Trust Quality Descriptor Leadership and Governance		Members	Trust Board	ARR	QEP	CEO	Exec	LGB	Head/Exec Head
Non Executive Leadership	Establish a high performing governance structure including appointing Trust Board committees and Local Governing Boards		A/R			R			
	Appoint/remove Members	A/R	I						
	Appoint/remove Trustees	A/R	C			C			
	Appoint/remove Chair/Vice Chair of Trust Board	I	A/R			C			
	Appoint and remove Governance Professional to the Trust Board		A/R			C		I	I
	Appoint/remove Board Committee Chairs (incl Chairs at LGB level)		A/R			C		I (Own LGB Chair)	I (Own LGB Chair)
	Determine LGB Composition and its Members: appoint and remove with the exception of Parent/Staff/Foundation LGB members		A/R			R		I	I
	Approve the appointment of the Foundation/Parent/Staff LGB members		A/R			C		I	I
	Determine and allocate specific Trustee roles (including Safeguarding and SEND lead trustees)		A/R			C			I
	Ensure financial skill set on Trust Board		A/R			C			
	Allocate governor specific roles at LGB level		A			I		R	R
	Establish Governance structure for the Trust and review annually		A/R			C		I	I
	Agree Scheme of Delegation and review annually		A	R		R		I	I
	Review and Agree Terms of Reference for Trust Committees including LGB		A/R			R		I	I
	Approve annual Schedule of Governance Business inclusive of appointing board committees		A/R			R		I	I
	Arrange regular External Reviews of Governance: submit to Members	I	A/R			R		I	I

	Complete annual Self-review of member contributions/impact on Trust Board and committees (including skills audits/training plan)	I	A/R						
	Complete annual LGB Skills audit and submit to Trust Board							R	R
	Complete annual report on the work of the LGB (Impact Statement): submit to Trust Board		A					R	R
	Allocate governor specific roles at LGB level		A			I		R	R
	Ensure appointment checks, induction and training are undertaken.		A			R		I	R
	Responsible for approving internal/external auditors		A						
	Approve a scheme for paying any Governors' allowances		A			R		I	
Executive Leadership	Appoint/dismiss Chief Executive Officer (CEO)/Accounting Officer	I	A/R						
	Appoint/dismiss other Executive leaders (<i>Including CFO</i>)	I	A			R			
	Appoint/dismiss Headteachers		A/R			R		I	
	Set CEO pay levels and award (as part of remuneration panel within QEP)		A		R				
	Review and recommend Executive Leaders' and Headteachers' pay levels and performance-related awards through the Trust's remuneration arrangement		A		R	R	C		
	Undertake Performance management of the Chief Executive Officer/Accounting Officer		A/R						
	Undertake Performance management of Executive Leaders		A			R			
	Undertake Performance management of Headteachers		A			R		R	
	Ensure the wellbeing, work-life balance and working conditions of staff		A			R		R	R
Link to Trust Quality Descriptor Leadership and Governance		Members	Trust Board	ARR	QEP	CEO	Exec	LGB	Head/Exec Head
	Ensure strategic oversight and accountability		A/R						
	Appoint External Auditors	A	R			R			

Accountability	Establish control framework including internal audit		A	R		R			
	Receive and respond to External and Internal Audit reports	I	A	R		A	R		
	Approve Annual report and accounts and present to members (annually)		A/R						
	Receive Trust Annual Accounts	A	R			R			
	Deliver Annual report and accounts including accounting policies, signed statement on regularity, propriety and compliance, incorporating governance statement demonstrating value for money: submit to members and Companies House		A/R			R			
	Benchmark Trust-wide value for money to ensure robustness			R		R	R		
	Ensure Trust's continuing compliance with all requirements of ESFA/DfE and Funding Agreement			R		R	R		
	Manage conflicts of interest and related party transactions			R		R	R		
	Deliver monthly management accounts and forecasts			R		C	R		
	Develop Trust-wide procurement strategies and efficiency savings programme			R		R	R		I
	Monitor and review Trust's Scheme of Financial Delegation – setting delegated authority limits for financial transactions			R		R	R		
	Agree and monitor Budget plan to support delivery of Trust key priorities			R		R	R		
	Agree and monitor Budget plan to support delivery of Academy key priorities			R		R	R	C Monitor budget plan	R
	Manage cash position			R		C	R		
	Ensure investment risk is properly managed			R		R	C		
	Ensure the Trust is adequately insured (RPA)			R		R			I
	Approve and maintain the risk process/register and approve the risk appetite			R		R			
	Complete Risk Register at School level			R		I		R	R

	Ensure risk assessments are in place to safeguard and promote pupils' and staff welfare			R		R		I	R
	Review and evaluate performance across the MAT through production and rigorous analysis of education data		A		R	R		R	R
	Establish, publish and keep under regular review Member and Trustee Register of Interests	R		R		R			
	Establish, publish and keep under regular review LGB Members' Register of Interests			R				R	R
	Ensure Gift and Hospitality Policy and register is in place and annually reviewed			R		R		R	R
	Set the School approach to curriculum and assessment in line with statutory requirements and context of the School and in line with Trust approach		A		R	R		R	R
	Deliver career guidance with regards to statutory requirements		A		R	R		I	R
	Deliver Early Years Foundation Stage (EYFS), in line with statutory requirements where applicable		A		R	R		R	R
	Ensure adherence with: Keeping Children Safe in Education, relating to safeguarding and safer recruitment		A		R	R		R	R
	For Church Schools, monitor and support the Christian distinctiveness and church ethos of the School		A		R	R		R	R
Link to Trust Quality Descriptor Leadership and Governance		Members	Trust Board	ARR	QEP	CEO	Exec	LGB	Head/Exec Head
	Ensure compliance with the Data Protection legislation and handling personal data in line with it		A	R		R		R	R
	Ensure compliance with the Freedom of Information Act, including publication of a Freedom of Information scheme		A	R		R			R
	Ensure adequate preparation if a cyber incident occurs and there is an awareness of cyber risks		A	R		R		R	R
	Adopt a Trust-wide complaints procedure and monitor complaints		A	R		R		R	R

Compliance	Set Trust safeguarding and pupil welfare policies, procedures and practices (including training), with regard to legislation and statutory guidance, inclusive of disclosure and barring service checks (DBS) and including appointing designated safeguarding lead (DSL)		A		R	R		R	R
	Set HR policies and procedures (appraisal, pay, conduct, disciplinary, grievance, capability, safer recruitment)		A		R	R			
	Agree and publish Whistleblowing procedures		A		R	R			
	Agree and Implement Health and Safety policies complying with all relevant health and safety legislation to ensure that all pupils, staff and visitors are kept safe at all times within the procedures and practices of the Trust		A	R		R		R	R
	Ensure the Estates Strategy is fit for purpose and recommend to the Board		A	R		R			
	Develop and implement uniform policies in line with DfE guidance and with regard to ensure that the cost of school uniforms is reasonable and secures the best value for money		A		R	I		R	R
	Ensure statutory policies are in place, approved and reviewed in line with DfE guidance including behaviour and welfare policies. (School Level)		A		R	R		R	R
	Maintain the attendance and admissions registers		A		R				R
	Approve Admissions Policy and arrangements and appeals		A		R			R	R
	Formally approve and review non DfE statutory School specific policies (Curriculum policies as required Collective Worship/Religious Education/RSHE)		A		R			R	R
	Ensure pupil attendance is monitored and challenged in line with statutory guidance		A		R	R		R	R
	Approve direction of pupils offsite (Alternative Provision)		A		R	R			R

Review the decision to suspend or permanently exclude a pupil/direct reinstatement of a pupil in line with statutory guidance		A		R			R	
Appoint/dismiss Deputy Headteacher & Assistant Headteacher (School)					A		I	R
Set Trust staffing structure		A			R		I	C
Set School staffing structure		A			R		C	R
Moving of staff within Schools to meet Trust need		A	R	R	R		I	C
Set pay and conditions of service for School and centrally employed staff		A		R	R			I
Review and agree School and centrally employed staff appraisal procedure (Performance Management) and pay progression		A		R	R		I	R
Ensure compliance with SEND Code of Practice		A		R	R		R	R
Ensure that there is a designated member of staff at school level identified to oversee the work required to oversee looked after children. (LAC)		A		R	R		R	R
Attend Trust inspections		A			I		R	
Set length of School day		A		R	R		R	R
Ensure all instances of loss/theft are notified to the CEO/AO to ensure compliance with the Academy Trust Handbook reporting requirements.		A	R		R	R		
Set Term dates		A		R	C		C	R
Ensure Trust Website Content and Compliance is in line with ESFA and DfE guidance		A	R		R	R		
Ensure School Website Content and Compliance is in line with DfE guidance		A	R		R	R	C	R

Order Value		Operational						Strategic	
Cost	Threshold	Goods		Services				Grounds & Buildings (Improvement/Upgrade)	
		Quotes	Approval	Quotes	Approval	Service Contracts Length	Leases	Quotes	Approval
£0 - £4,000*	Low	-	Headteacher	-	Headteacher	Up to 3 years	Headteacher, CFO & CEO to approve all lease commitments	Framework agreement or up to 3 quotes	Trust Estates Manager, CFO & CEO
£4,000 - £10,000*		Framework agreement or 3 quotes	Headteacher & CFO	Framework agreement or 3 quotes	Headteacher & CFO	Over 3 years - Headteacher, CFO & CEO			
£10,000 - £40,000*	Medium		Headteacher, CFO & CEO		Headteacher, CFO & CEO				
Over £40,000* and up to PCR procurement thresholds	High	Framework agreement	Trust Board	Framework agreement	Trust Board	Trust Board	Trust Board	Framework agreement	Trust Board

* All figures are stated excluding VAT

^ VAT inclusive value would be £213,477