



TRUSTEE BOARD DECISION PLANNER SCHEME OF DELEGATION MALCOLM SARGENT PRIMARY SCHOOL

September 2024

Next Review September 2025

THIS PLANNER SHOWS TO WHICH LEVEL THE TRUSTEE BOARD MAY LEGALLY DELEGATE FUNCTIONS

KEY

- Level 1: Full Trustee Board
- Level 2: A Committee of the Trustee Board
- Level 3: Chair of Trustees
- Level 4: Principal.

Column blank: Action could be undertaken by this level.
Column blocked off: Function cannot be legally carried out at this level.

Although decisions may be delegated, the trustee board as a whole remains responsible for any decision made under delegation

Key Function	No	Tasks	Decision Level			
			1	2	3	4
Budgets	1	To approve the first formal budget plan each financial year	✓			
	2	To monitor monthly expenditure.		✓		✓
	3	To establish a charging and remissions policy		✓		
	4	Miscellaneous financial decisions				✓
	5	To enter into contracts (FTB may wish to agree financial limits)				✓
	6	To make payments				✓
Staffing	7	Principal appointments (selection panel)	✓			
	8	Vice Principal appointments (selection panel)	✓			
	9	Appoint other teachers				✓
	10	Appoint non teaching staff				✓
	11	Agree a pay policy		✓		
	12	Pay discretions		✓		
	13	Establishing disciplinary/capability procedures				✓
	14	Dismissal of Principal	✓			
	15a	Dismissal of teaching staff				✓

	15b	Dismissal non teaching staff				✓
	16	Suspending Principal			✓	
	17	Suspending staff (except Principal)				✓
	18	Ending suspension Principal)		✓		
	19	Ending suspension (except Principal)		✓		
	20	Determining staff complement		✓		
	21	In voluntary and foundation schools to agree whether or not the Chief Education Officer/diocesan authority should have advisory rights		✓		
	22	Determining dismissal payments/ early retirement		✓		
Curriculum	23	Ensure National Curriculum (NC) taught to all pupils and to consider any disapplication for pupil(s)				✓
	24	To establish a curriculum policy				✓
	25	To implement curriculum policy				✓
	26	To agree or reject and monitor curriculum policy		✓		
	27	Responsible for standards of teaching				✓
	28	To decide which subject options should be taught having regard to resources, and implement provision for flexibility in the curriculum (including activities outside school day)				✓
	29	Responsibility for individual child's education				✓
	30	Provision of sex education – to establish and keep up to date a written policy				✓
	31	To prohibit political indoctrination and ensuring the balanced treatment of political issues				✓
	32	To establish a charging and remissions policy for activities (non NC based)				✓
Performance Management	33	To formulate a performance management policy				✓
	34	To establish a performance management policy		✓		
	35	To implement the performance management policy				✓
	36	To review annually the performance management policy		✓		
Target Setting	37	To set and publish targets for pupil achievement				✓
Discipline/Exclusions	38	To establish a discipline policy		✓		

	39	To review the use of exclusion and to decide whether or not to confirm all permanent exclusions and fixed term exclusions where the pupil is either excluded for more than 15 days in total in a term or would lose the opportunity to sit a public examination. (Can be delegated to chair/vice-chair in cases of urgency)		✓		
	40	To direct reinstatement of excluded pupils (Can be delegated to chair/vice-chair in cases of urgency)		✓		
Admissions	41	To consult annually before setting an admissions policy	✓			
	42	To establish an admissions policy (special schools where pupils do not have a statement) acting with LA		✓		
	43	Admissions: application decisions (but in community and controlled schools only where the LA has delegated this power to the trustee board)		✓		
	44	Admissions: application decisions		✓		
	45	To appeal against LA directions to admit pupil(s)		✓		
Religious Education	46	Responsibility for ensuring provision of RE in line with school's basic curriculum (all schools) NB this must fall into line with locally agreed syllabus				✓
	47	Decision to revert to previous RE syllabus		✓		
	48	Decision to provide RE according to trust deed/specified denomination in VA schools with religious character (Foundation and VC schools of religious character at request of parents)	N/A	N/A	N/A	N/A
	49	Decision to provide RE in line with locally agreed syllabus				✓
Collective Worship	50	In all maintained schools to ensure that all pupils take part in a daily act of collective worship (after consulting FTB)				✓
	51	To make application to the advisory councils, SACRE, concerning the requirements for collective worship (schools without a religious character) to disapply (after consulting FTB)				✓
	52	Arrangements for collective worship (schools without				✓

		religious character (after consulting FTB)				
	53	Arrangements for collective worship in Foundation schools of religious character, VC or VA schools (after consulting Principal)		✓		
Premises & Insurance	54	Buildings insurance and personal liability– (it is suggested that the FTB as a whole should be involved in this decision)		✓		
	55	Developing school buildings strategy or master (it is suggested that the FTB as a whole should undertake this decision)	✓			
	56	Procuring and maintaining buildings, including developing properly funded maintenance plan	✓			
Health & Safety	57	To institute a health and safety policy	✓			
	58	To ensure that health and safety regulations are followed				✓
School Organisation	59	To publish proposals to change category of school	✓			
	60	Proposal to alter or discontinue voluntary foundation or foundation special school	✓			
	61	To set the times of school sessions and the dates of school terms and holidays except in community and VC schools where it is the LA		✓		
	62	To ensure that the school meets for 380 sessions in a school year				✓
	63	To ensure that school lunch nutritional standards are met where provided by the trustee board.				✓
Information For Parents	64	To prepare and publish the school prospectus				✓
	65	To ensure provision of free school meals to those pupils meeting the criteria				✓
	66	Adoption and review of home-school agreements		✓		
TB Procedures	67	To draw up instrument of government and any amendments thereafter	✓			
	68	To appoint (and remove) the chair and vice-chair of a permanent or a temporary trustee board	✓			
	69	To appoint and dismiss the clerk to the Trustees	✓			
	70	To hold a full trustee board meeting at least three times in a school year or a meeting of	✓			

		the temporary trustee board as often may require				
	71	To appoint and remove community or sponsor Trustees.	✓			
	72	To set up a Register of Trustees' Business Interests	✓			
	73	To approve and set up a Trustees Expenses Scheme	✓			
	74	To discharge duties in respect of pupils with special needs by appointing a "responsible person" in community, voluntary and Foundation Schools		✓		
	75	To consider whether or not to exercise delegation of functions to individuals or committees	✓			
	76	To regulate the FTB procedures (where not set out in law)	✓			
	77	Appointment of suitable internal auditors		✓		
Federations	78	To consider forming a federation or joining an existing federation	✓			
	79	To consider requests from other schools to join the federation	✓			
	80	To leave a federation	✓			
Extended Schools	81*	To decide to offer additional activities and to what form these should take	✓			
	82	To put into place the additional services provided				✓
	83	To ensure delivery of services provided				✓
	84*	To cease providing extended school provision	✓			
	85	Lettings for the school	✓			

*Although these tasks are open to delegation under the Education (School Government)(Terms of Reference) (England) Regulations 2000, the expectation would be that these decisions would be undertaken by the full Trustee Board.