TRUSTEE BOARD DECISION PLANNER
MALCOLM SARGENT PRIMARY SCHOOL

September 2026 Next Review September 2027

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

KEY
FTB: Full Trustee Board
Com.: A Committee of the Trustee Board (*Designated C'ttee column 1*)
CoT: Chair of Trustees
P: 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 <u>accountable</u> for any decision made under delegation.**

<u>RACI Definition:</u>
Responsible:
The person or people who perform the task or deliverable. They are the doers.
Accountable:
The person who is ultimately answerable for the correct and thorough completion of the task or deliverable. This role ensures the task is done. There should only be one accountable person per task.
Consulted:
The people whose opinions and input are sought before a decision or action is taken. They provide feedback and expertise.
Informed:
The people who are kept up-to-date on the progress or completion of a task. They are not involved in the execution or decision-making.

Reference the Academies Handbook: https://www.gov.uk/government/publications/academy-trust-handbook/academy-trust-handbook-2025-effective-from-1-september-2025

Budgets

Committee	Tasks	FTB	Com.	CoT	P
(F&S)	To approve the first formal budget plan each financial year	R	C		
(F&S)	To monitor monthly expenditure.	I	C		R
(F&S)	To establish a charging and remissions policy	I	R		C
(F&S)	Miscellaneous financial decisions		I		R
(F&S)	To enter into contracts (FTB may wish to agree financial limits)		I		R

Staffing

Committee	Tasks	FTB	Com.	CoT	P
	Principal appointments (selection panel)	R			
	Vice Principal appointments (selection panel)	R			
(Staffing)	Appoint other teachers		I		R
(Staffing)	Appoint non-teaching staff		I		R
(Staffing)	Agree a pay policy	I	R		
(Staffing)	Pay discretions	I	R		
(Staffing)	Establishing disciplinary/capability procedures	I	R		C
	Dismissal of Principal	R			
(Staffing)	Dismissal of teaching staff		I		R
(Staffing)	Dismissal non teaching staff		I		R
	Suspending Principal	I		R	
	Suspending staff (except Principal)			I	R
(Staffing)	Ending suspension Principal)	I	R	C	
(Staffing)	Ending suspension (except Principal)	I	R	C	
(Staffing)	Determining staff complement	I	R		
(Staffing)	Determining dismissal payments/ early retirement	I	R		

Curriculum

Committee	Tasks	FTB	Com.	CoT	P
(Curriculum)	Ensure National Curriculum (NC) taught to all pupils and to consider any disapplication for pupil(s)	I	C		R
(Curriculum)	To establish a curriculum policy	I	C		R
(Curriculum)	To implement curriculum policy	I	C		R
(Curriculum)	To agree or reject and monitor curriculum policy	I	R		C
(Curriculum)	Responsible for standards of teaching		I		R
(Curriculum)	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)		I		R
(Curriculum)	Responsibility for individual child's education		I		R
(Curriculum)	Provision of sex education – to establish and keep up to date a written policy	I	C		R
(Curriculum)	To prohibit political indoctrination and ensuring the balanced treatment of political issues	I	C		R
(Curriculum)	To establish a charging and remissions policy for activities (non NC based)	I	R		C

Performance Management

(Staffing)	To formulate a performance management policy	I	C		R
(Staffing)	To establish a performance management policy	I	R		C
(Staffing)	To implement the performance management policy	I	C		R
(Staffing)	To review annually the performance management policy	I	R		C
(Pay Review)	Pay Policy: PR Committee is responsible for decisions on pay, following recommendations by the Principal. The Principal is responsible for day-today management of the policy.	I	R		C
(Pay Review)	Executive Pay Review: The Appraisal Committee will review the Principal's performance (C), and make a recommendation to the Pay Review committee (R).	I	RC		

Target Setting

Committee	Tasks	FTB	Com.	CoT	P
(Curriculum)	To set and publish targets for pupil achievement	I	C		R

Discipline/Exclusions

Committee	Tasks	FTB	Com.	CoT	P
(Curriculum)	To establish a discipline policy	I	R		C
(Pupil Discipline Panel)	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)	I	R		
(Pupil Discipline Panel)	To direct reinstatement of excluded pupils (Can be delegated to chair/vice-chair in cases of urgency)	I	R		

Admissions

Committee	Tasks	FTB	Com.	CoT	P
	To consult annually before setting an admissions policy	R			
(Curriculum)	To establish an admissions policy (special schools where pupils do not have a statement) acting with LA	R	C		
(Admission Appeals)	Admissions: application decisions (but in community and controlled schools only where the LA has delegated this power to the trustee board)	I	R		
(Admission Appeals)	Admissions: application decisions	I	R		
(Admission Appeals)	To appeal against LA directions to admit pupil(s)	I	R		

Religious Education

Committee	Tasks	FTB	Com.	CoT	P
(Curriculum)	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		I		R
(Curriculum)	Decision to revert to previous RE syllabus	I	R		C
(Curriculum)	Decision to provide RE in line with locally agreed syllabus	I	C		R

Collective Worship

Committee	Tasks	FTB	Com.	CoT	P
(Curriculum)	In all maintained schools to ensure that all pupils take part in a daily act of collective worship (after consulting FTB)		I		R
(Curriculum)	To make application to the advisory councils, SACRE, concerning the requirements for collective worship (schools without a religious character) to disapply (after consulting FTB)	C	I		R
(Curriculum)	Arrangements for collective worship (schools without religious character (after consulting FTB)	C	I		R

Premises & Insurance

Committee	Tasks	FTB	Com.	CoT	P
(F&S)	Buildings insurance and personal liability– (it is suggested that the FTB as a whole should be involved in this decision)	R	C		
(F&S)	Developing school buildings strategy or master (it is suggested that the FTB as a whole should undertake this decision)	R	C		
(F&S)	Procuring and maintaining buildings, including developing properly funded maintenance plan	I	R		C

Health & Safety

Committee	Tasks	FTB	Com.	CoT	P
(Staffing)	To institute a health and safety policy	R	C		
(Link Trustee + H&S C'ttee)	To ensure that health and safety regulations are followed	I	C		R

School Organisation

Committee	Tasks	FTB	Com.	CoT	P
	To publish proposals to change category of school	R			
(Curriculum)	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	I	R		C
(Curriculum)	To ensure that the school meets for 380 sessions in a school year		I		R
(Curriculum)	To ensure that school lunch nutritional standards are met where provided by the trustee board.	I	C		R

Information For Parents

Committee	Tasks	FTB	Com.	CoT	P
(Curriculum)	To prepare & maintain the school website.	I	C		R
(Curriculum)	To ensure provision of free school meals to those pupils meeting the criteria		I		R
(Curriculum)	Adoption and review of home-school agreements	I	R		C

Trust Board Procedures

Committee	Tasks	FTB	Com.	CoT	P
	To draw up instrument of government and any amendments thereafter	R			
	To appoint (and remove) the chair and vice-chair of a permanent or a temporary trustee board	R			
	To appoint and dismiss the clerk to the Trustees	R			
	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	R			
	To appoint and remove community or sponsor Trustees.	R			
	To set up a Register of Trustees' Business Interests	R			
	To approve and set up a Trustees Expenses Scheme	R			
(Curriculum-Link SEND Trustee)	To discharge duties in respect of pupils with special needs by appointing a "responsible person"	I	R		
(Curriculum-Safeguarding Link Trustee)	To discharge duties in respect of safeguarding pupils. Assisted by the appointment of a "Link Trustee" who will examine safeguarding processes, including the e-safety log.	I	R		
	To consider whether or not to exercise delegation of functions to individuals or committees	R			
	To regulate the FTB procedures (where not set out in law)	R			
(F&S)	Appointment of suitable internal auditors	I	R		C

Federations

Committee	Tasks	FTB	Com.	CoT	P
	To consider forming a federation or joining an existing federation	R			
	To consider requests from other schools to join the federation	R			
	To leave a federation	R			

Extended Schools

Committee	Tasks	FTB	Com.	CoT	P
(Curriculum)	To decide to offer additional activities and to what form these should take	R	C		
(Curriculum)	To put into place the additional services provided	I	C		R
(Curriculum)	To ensure delivery of services provided	I	C		R
	To cease providing extended school provision	R			
(F&S)	Lettings for the school	I	R		C