



## STRATEGIC LEADERSHIP - ROLES AND RESPONSIBILITIES 2024/25

(To be read in conjunction with the Abingdon Learning Trust Scheme of Delegation and Policy Matrix)

Members	Trust Board	Local Academy Committees (LACs) (JMF6 Committee)	Executive	Headteacher (HT)
<p>Review and amend the Articles of Association</p> <p>Change the name of the Trust</p> <p>To receive the Annual Report from Trustees on the performance of the Trust</p>	<p>Set out the Trust's vision, values, principles (ethos) and goals</p> <p>Approve and annually review Trust Strategic (1+ years) Business and 1-year Development Plans</p> <p>Agree Key Performance Indicators for the Trust and monitor progress toward these</p> <p>Approve School Performance Targets</p>	<p>Carry forward the Trust's vision, values, ethos and goals</p> <p>In consultation with HT oversee the implementation of the vision, values and ethos of a school/s</p> <p>Recommend school/s strategic (1+ years) improvement plans for Trust Board approval</p> <p>Recommend School/Performance targets for Trust Board approval</p> <p>Approve and monitor the progress of school's 1-year development plans</p>	<p>Advise the Trust Board in setting the vision, values and ethos of the Trust</p> <p>Promote and monitor the implementation of the Trust's vision, values and goals</p> <p>Develop, for Trust Board approval, implement and review the Trust's Strategic/Business Plan</p> <p>Develop and implement Trust 1-year improvement plans</p> <p>Approve and monitor school strategic (1+ years) improvement plans and recommend targets for Trust Board approval</p> <p>Attend meetings of the Trustees as required to provide regular reports, risk assessments, action plans and guidance</p> <p>Support Trustees in the preparation and presentation of the Annual Report</p> <p>Secure professional advice on behalf of Trustees as may be requested</p>	<p>Develop for LAC approval, and implement the vision, values and ethos of the school (consistent with the Trust's vision and values)</p> <p>Develop and recommend to the LAC and CEO short- and long-term improvement plans and targets for the school</p> <p>Attend meetings of the LAC and relevant governance groups as required to provide regular reports, risk assessments, action plans and guidance</p> <p>Secure professional advice on behalf of LAC as may be requested</p>

Members	Trust Board	Local Academy Committees (LACs) (JMF6 Committee)	Executive	Headteacher (HT)
To consider complaints against Trustees or the Trust Board in line with Trust policy	Approve, review, amend and ensure (monitor and evaluate) Trust policies	Ensure (monitor and evaluate) the implementation of Trust and statutory policies in the school/s  Within Trust guidelines, approve, review and ensure (monitor and evaluate) School/s policies	Support Trustees and schools in the preparation and monitoring of Trust wide policy requirements  Approve individual school adjustments to Trust policy  Provide reports to Trustees on compliance with and impact of Trust policies, including actions taken and recommendations for further action if required	Implement Trust-wide policies reporting issues of non-compliance promptly to the CEO and LAC  Develop, for LAC approval (see Trust Policy Matrix), implement and report to the LAC on the effectiveness of school policies
Appoint Trustees	Approve, review and amend - Scheme of Delegation - This roles and functions matrix - Terms of Reference for Trust Committees (inc. LACs/JMF6)  Appoint and remove - Company Secretary - Clerks to Trustees, LACs - LAC governors (except for elected positions) - Chairs of Trust committees (inc. LAC/JMF6) - Vice Chairs of LAC  Determine and implement procedures for evaluating the effectiveness of governance across all Trust tiers and implement these for the Trust Board to develop capacity, capability and resilience	Appoint and remove governors with specific link responsibilities as set out in local governance arrangements (including safeguarding, SEND, pupil premium)  Make arrangements for the election of staff and parent governors  Implement and respond to the outcomes of governance evaluations to develop the capacity, capability, resilience and effectiveness of the LAC  Develop and implement a means whereby the LAC/school can receive and react to stakeholder (students, parents, staff, community etc) feedback at least annually	Advise and support the Trust Board in the review and amendment of delegations and terms of reference  Oversee and contribute to evaluations of governance and support the Trust Board in implementing governance improvement and development plans  Support Trustees in the appointment process for the Company Secretary, Clerks, LAC chairs	Advise and support the CEO and LAC in the review and amendment of delegations and terms of reference  Contribute to evaluations of governance and support the CEO and LAC in implementing governance improvement and development plans  Develop procedures for receiving and responding to stakeholder feedback and maintaining relationships with the community, sharing with the LAC to support their decision-making
	Ensure that risk and audit responsibilities are clearly and appropriately delegated and agree the Trust's risk management principles  Agree and regularly (at least annually at Board level [ATH])	In consultation with the HT agree the risk management principles for the school  Oversee and ensure risk management strategies to include regular (at least	Prepare, regularly review and maintain the risk register for the Trust  Support school leaders, LACs in implementing Trust risk management arrangements including to ensure risk	Implement Trust risk management arrangements including to ensure risk registers are in place, up to date and in use for the school  Progress mitigation plans and escalate issues of concern

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	<p>review the risk register and monitor the progress of mitigation plans</p> <p>Approve insurance arrangements</p>	<p>annual) review of the school risk register and monitoring the progress of mitigation plans</p> <p>Receive and respond to HT reports on risk</p> <p>Review with the HT decisions on school closures</p>	<p>registers are in place and in use in Trust schools</p> <p>Alert the Trust Board to issues of high risk and develop and implement appropriate mitigation plans</p> <p>Advise HT in considering school closure</p>	<p>(high risk, non-compliance) promptly to the CEO and LAC chair</p> <p>Take decisions on school closures in line with school risk assessments and policies</p>
	<p>Ensure that HR responsibilities are clearly and appropriately delegated</p> <p>Approve Trust-wide policies, annual pay award and staff terms and conditions</p> <p>Approve Trust central staff structure and management structures across the Trust (within budget plans)</p> <p>Approve staff restructures where there are financial implications outside the budget cycle</p> <p>Approve school staff redundancies</p>	<p>Oversee and ensure the implementation of Trust HR policies including to establish panels as necessary</p> <p>Ensure effective communication between HT and CEO</p> <p>Support the HT in the review and recommendations to the CEO for change to the school's staffing structure</p>	<p>Advise Trustees on suitable Trust-wide policies and procedures and ensure their effective implementation</p> <p>Monitor, review and, where delegated, approve staffing changes (including appointments and restructures within budget) across the Trust</p> <p>Make recommendations to the Trustees on staffing structure changes where there are financial implications</p>	<p>Implement Trust-wide policies</p> <p>Approve applications for early retirement, secondment and leave of absence</p> <p>Recommend staffing requirements within the School budget</p> <p>Propose staff restructures and redundancies for CEO and Trustee approval</p>
	<p>Appoint, performance manage/appraise, suspend, and dismiss the CEO (acting through a panel)</p> <p>Approve Trust executive staff appointments</p> <p>Appoint, suspend, approve the return and dismiss the Company Secretary and Clerks</p> <p>Approve the appointment or dismissal of members of the Executive Team considering</p>	<p>Participate in the recruitment and performance reviews of HT</p> <p>Support the HT in recruitment procedures to ensure the school is fully staffed</p> <p>Approve appointments to senior leadership positions considering the recommendations of the HT</p> <p>Contribute to the performance review of the Clerk to the LAC, with the CEO/Governance Professional and, if necessary, make recommendations to the LAC for dismissal</p>	<p>CEO ONLY: Make recommendations to the Board for the appointment or dismissal of members of the Executive (excluding CEO) and undertake their performance reviews</p> <p>Complete performance review, suspend and approve the return of Executive Team (excluding CEO) members</p> <p>Working with the LAC: appoint, performance review, suspend, approve the return of the HT</p>	<p>Conduct the performance management/appraisal of staff in the school (delegating as appropriate)</p> <p>Within the agreed staffing structure recommend senior leadership appointments to the LAC and consult with CEO</p> <p>Suspend or approve the return of senior leadership, teaching and non-teaching staff in consultation with the CEO</p>

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	<p>the recommendations of the CEO and relevant panels</p> <p>Approve the dismissal of HTs considering the recommendations of the CEO and relevant panels</p>	<p>Ensure that the Appraisal Policy is effectively implemented in the school</p>	<p>(making recommendations to Trustees for dismissals)</p> <p>Support the LAC in appointing senior school leaders</p> <p>Appoint, performance review, suspend, and approve the return members of the Central Team</p> <p>CEO only: Implement the Executive Appraisal policy</p> <p>Conduct the appraisal of the Company Secretary and Governance Professional and, if necessary, make recommendations to the Trust Board for dismissal</p> <p>Support the Trust Board in the recruitment of the Company Secretary and Governance Professional</p>	
<p>Appoint external auditors</p>	<p>Oversee and monitor the financial governance and operation of the Trust</p> <p>Appoint an Accounting Officer</p> <p>Appoint a Finance and Audit committee</p> <p>Ensure proper financial controls are in place and monitor their implementation including maintaining a register of business and pecuniary interests</p> <p>Appoint internal auditors</p> <p>Sign off annual accounts and report</p>	<p>Oversee the maintenance of a register of business and pecuniary interests for the school</p> <p>Ensure the provision of free school meals to pupils who meet the criteria</p>	<p>CEO only: Fulfil the role of Accounting Officer</p> <p>Ensure proper financial controls are in place across the Trust</p> <p>Maintain a register of business and pecuniary interests for the Executive Team and ensure that the Trust's register is complete and up to date</p> <p>Set up and approve staff expenses for the Executive Team</p> <p>Open bank accounts</p> <p>Support the appointment process for internal and external auditors</p>	<p>Ensure proper financial controls are in place in the School</p> <p>To set up procedures for and to approve staff expenses at the school</p> <p>To ensure the provision of free school meals to pupils who meet the criteria</p> <p>To maintain a register of business and pecuniary interests for the school</p>

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	<p>Approve the financial scheme of delegation</p> <p>Approve Central Charges to schools</p> <p>Establish a charging and remissions policy and keep this under review</p> <p>Approve a Trustee/governor expenses policy</p>		<p>Respond to Audit recommendations and requirements</p> <p>Provide termly reports to the Trustees regarding financial risk</p>	
	<p>Approve Trust and School 3-year budget plans</p> <p>Approve Trust and School 1-year budgets</p> <p>Approve any significant changes to the approved budgets</p> <p>Monitor income, expenditure, cash flow and balance sheet of the Trust</p> <p>Receive and respond to termly reports from the COO on financial risk</p>	<p>Receive updates on budget issues and mitigation actions from HT/COO where risk becomes medium to high</p>	<p>Prepare and recommend to Trustees the annual and 3-year budget for the Trust and its schools, with monthly management accounts</p> <p>Monitor income, expenditure, cash flow and balance sheet for the schools and Trust and report regularly to the Board</p> <p>Provide monthly financial monitoring reports to Headteachers</p>	<p>With the support of relevant central staff prepare the annual and 3-year budget for the school</p> <p>Monitor income, expenditure, cash flow and balance sheet for the school</p>
	<p>Adopt and ensure (monitor and evaluate) a Trust-wide procurement policy including to manage Conflicts of Interest</p> <p>Set the delegated levels of authority for contracts</p> <p>Approve contracts in accordance with our Financial Regulations Handbook</p> <p>Identify contracts with constitute related party transactions and seek ESFA approval</p>		<p>Monitor and ensure the effective implementation of the Trust's procurement policy and controls</p> <p>Enter into contracts up to the limits of delegation within an agreed budget</p> <p>Make payments within agreed financial limits</p> <p>Support trustees in monitoring and evaluating contracts and services</p>	<p>Monitor and ensure the effective implementation of the Trust's procurement policy and controls</p> <p>Enter into contracts up to the limits of delegation within an agreed budget</p> <p>Approve payments within agreed financial limits</p>

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	Monitor and evaluate contracts entered into by the Trust for compliance, value for money and impact			
	<p>Appoint an education standards (academic and pastoral) committee</p> <p>Review, approve and monitor educational performance targets recommended by the CEO</p> <p>Determine a Trust curriculum statement to ensure a balanced and broadly based curriculum meeting the requirements of the Funding Agreement and to include</p> <ul style="list-style-type: none"> <li>- a prohibition on the political indoctrination and a balanced treatment of political issues</li> <li>- a written policy on sex and relationship education</li> </ul> <p>Determine a Trust policy on religious education and collective acts of worship</p> <p>Receive and respond to a termly report from the CEO/executive regarding educational risks</p>	<p>Oversee and monitor the educational performance of the school</p> <p>In line with Trust guidance, approve, review and ensure school policies related to curriculum and educational standards (e.g. assessment)</p> <p>Approve the curriculum proposed by the HT (in line with the Trust's principles)</p> <p>Ensure effective processes are in place for quality assuring teaching and learning, the curriculum, inclusion and sharing good practice</p> <p>Monitor the key metric figures reported from the HT relating to education standards</p> <p>Approve and monitor the 1-year development plan for the school</p> <p>Receive and respond to reports from the executive and HT regarding educational risks</p>	<p>Oversee and ensure the implementation of Trust curriculum guidance</p> <p>Provide termly reports to Trustees regarding educational risk</p> <p>Oversee target setting for pupil achievement and progress and monitor performance against targets</p> <p>Monitor the key metric figures reported by the HTs relating to standards</p> <p>Ensure compliance with Trust and statutory policies and support the development of school specific policies as required</p>	<p>Recommend and implement a curriculum plan for adoption by the LAC</p> <p>Ensure that the curriculum is delivered at the school, including compliance with any Funding Agreement requirements</p> <p>Make provision for a daily act of collective worship</p> <p>Recommend to the CEO targets for pupil achievement and progress and monitor progress towards those targets</p> <p>Report key metric figures via the HT's report to the CEO and LAC</p> <p>Prepare and implement a 1-year School Development Plan for approval by the LAC and CEO</p> <p>Develop and recommend to the LAC and CEO school specific policies supporting high standards and achievement</p> <p>Provide regular reports to the LAC on educational achievements and risks</p>
	Determine a Trust SEN and Disability policy	Oversee and ensure (monitor and evaluate) the implementation of the Trust's SEND policy	Oversee and ensure the implementation of the Trust's SEND policy	Designate a teacher to be responsible for the co-ordination of SEND provision

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	<p>Ensure compliance with the Equality Act requirements within the Trust's schools</p>	<p>With the HT review SEND plans (evaluate the impact of SEND action plans) and approve the publication of the school/s annual SEND report</p>	<p>Ensure compliance with the Equalities Act requirements within the Trust</p>	<p>Liaise with the Local Authority in respect of students who have (or might have) SEND</p> <p>Make provision for SEND pupils with or without an Education, Health and Care plan (EHCP)</p> <p>Ensure compliance with the Equalities Act requirements within the school</p> <p>Prepare and recommend to the LAC the school's annual SEND report and ensure its publication to the school's website</p>
	<p>Adopt a Trust Safeguarding and Child Protection Policy</p> <p>Identify a safeguarding Trustee and receive their regular reports</p> <p>Ensure that all Trustees complete agreed annual safeguarding training</p>	<p>Oversee and ensure the implementation of the Trust's Safeguarding and Child Protection Policy and other associated policies and guidance ( eg KCSIE)</p> <p>If appropriate, work with the HT to develop and recommend to the CEO school specific adaptations to the Trust's Child Protection policy for the school and oversee the implementation of these arrangements</p> <p>Appoint a LAC governor with lead responsibility for safeguarding</p> <p>Ensure the completion of the Single Central Record (SCR) and its regular up-dating</p> <p>Review, approve and ensure the timely submission of the school's annual safeguarding report</p> <p>Receive and respond to reports from the CEO/HTs regarding safeguarding or compliance risks</p>	<p>Ensure that each school has appointed a designated safeguarding lead (DSL) and a designated teacher for Children We Care For (CWCF)</p> <p>Quality assure arrangements for safeguarding in the schools, including to undertake SCR reviews on behalf of the Trust Board</p> <p>Report to Trustees on the procedures in place for safeguarding and on matters as they arise</p>	<p>Ensure compliance with Trust and school policy</p> <p>Appoint a DSL (and deputy/ies) and a designated teacher to support CWCF and ensure the roles are compliant with statutory guidance</p> <p>Maintain and regularly review the SCR for the school ensuring that it is up to date, accurate and complete</p> <p>Approve off-site visits for pupils of more than 24 hours</p> <p>Prepare and recommend to the LAC the school's annual safeguarding report/audit and associated action plans</p> <p>Report to CEO and LAC on procedures in place for safeguarding and any risks arising</p>

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		Monitor, challenge and support the progress of safeguarding action plans		
	Approve a Trust behaviour statement  Review the use of suspensions and exclusions across the Trust	Approve and Oversee the implementation of a behaviour policy for the school  Convene a committee to review pupil suspensions and exclusions in line with Trust and statutory guidance	Ensure the implementation of Trust behaviour principles  Develop and recommend to Trustees the Trust's behaviour statement  Review the overall pattern of suspensions and exclusions and report to Trustees, including to make recommendations on any actions required	In line with Trust principles, prepare and implement a behaviour policy for the school for adoption by the LAC  Recommend the exclusion of a pupil permanently; suspend a pupil for a fixed term
	Adopt Trust admissions policies for each school  Undertake consultation, publish admissions and annually determine arrangements as required in accordance with the School Admissions Codes  Make arrangements for determining admissions and hearing admission appeals  Approve changes to school age range and pupil admission numbers (PAN)	Ensure effective arrangements are in place for pupil recruitment  Contribute to the development of the School prospectus  Review and propose changes to the school/s' age range or admission numbers for approval by Trustees	Propose Trust admissions policies for the schools for adoption by Trustees  Provide oversight of and support the implementation of the admissions arrangements across the Trust	Ensure compliance with Trust policy  Make arrangements for determining admissions and hearing admission appeals  Participate in local admissions forum, IYFAP etc.  Ensure participation in the fair access protocol  Propose changes to the school's age range and PAN to the LAC and CEO
	Receive and respond to reports from CEO regarding compliance and standards (to include attendance)  Adopt a Trust Complaints policy; receive respond to reports from the CEO regarding the level of complaints across the Trust	Review attendance and pupil absences (as part of HT report)  Appoint a governor with responsibility for Pupil Premium  Monitor the impact of Pupil Premium spending and action plans in the School/s  With the HT review Pupil Premium spending and action plans and approve	Monitor levels of attendance in Trust schools and report termly to Trustees  Monitor the impact of Pupil Premium spending across the Trust  Review and report on the level of complaints across the Trust, actions taken and	Maintain a register of pupil attendance  Report on attendance and pupil absences  Review and maintain Home School agreements  Propose times of School sessions and dates of term and holidays



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	<p>Approve school times, terms and holiday</p>	<p>the publication of the school/s annual Pupil Premium report</p> <p>Primary: with the HT, review PE/Sport grant spending and action plans and approve the publication of the school/s annual report</p> <p>Adopt and ensure the implementation of the Trust Complaints policy in the school/s</p> <p>Hear complaints at the relevant stage</p> <p>Ensure effective arrangements are in place for pupil support and representation in the school</p> <p>Support the HT in any extended school provision</p> <p>Develop, recommend and monitor school website content, logo and branding and uniform</p>	<p>recommendations for further actions required</p> <p>Recommend school times and school dates for Trustee approval</p> <p>Approve staff training (INSET) days</p> <p>Approve Trust and school website content, logo and branding, uniform</p>	<p>Ensure the effective deployment of the Pupil Premium grant and monitor its impact</p> <p>Hear complaints at the relevant stage</p> <p>Recommend school website content, logo &amp; branding, uniform</p>
	<p>Adopt data protection (GDPR) and Freedom of Information (FOI) policies and procedures to cover: the requirement to notify individuals as to how information is to be used; and, on the matter of safe storage</p> <p>Ensure the effective implementation of the information management and reporting policies and procedures across the Trust</p>	<p>Ensure the effective implementation of the information management (GDPR/FOI) and reporting policies and procedures in the school/s</p> <p>In line with the Trust's strategy, ensure systems are in place at the school for effective communication with pupils, parents or careers, staff and the wider community including the support of a local parent teacher association (if established)</p>	<p>Ensure compliance with all information management and reporting regulations and good practice across the schools and Central Team</p> <p>Support individual schools on compliant data protection procedures, including the effective safe storage of data</p> <p>Maintain and secure staff records for the Executive Team</p> <p>To ensure registration with the Information Commissioner is up to date</p> <p>Report to Trustees on security breaches and issues of non-compliance including actions taken and additional actions needed</p>	<p>Prepare and implement GDPR and FOI policies for the school (in line with Trust policy) for adoption by the LAC</p> <p>Ensure the publication of School information, ensuring that all electronic communication, including webpages, are up to date</p> <p>Maintain accurate and secure pupil records</p> <p>Maintain accurate and secure staff records</p> <p>Ensure compliance with all information management reporting legislation and good practice in the school</p> <p>Report security breaches and issues of concern promptly to</p>

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				the COO and LAC Chair including actions taken or proposed responses
	<p>Approve a Health &amp; Safety policy for the Trust</p> <p>Appoint a lead trustee for H&amp;S</p> <p>Adopt a Trust Lettings policy</p> <p>Review and maintain a buildings strategy and asset management arrangements</p> <p>Receive and respond to reports from the CEO/COO regarding H&amp;S and compliance</p>	<p>Adopt the Trust's H&amp;S policy</p> <p>Review and ensure the implementation of H&amp;S policy and ensure that appropriate risk assessments are being carried out in school</p> <p>Review and ensure the effective implementation of the Lettings policy</p> <p>Receive and respond to reports from the CEO/HTs and external/internal audits and check progress of required actions regarding H&amp;S and compliance in relation to site security and safeguarding</p>	<p>Propose a Trust H&amp;S policy and Lettings policy for approval by Trustees</p> <p>Monitor and support the implementation of the Trust H&amp;S and Lettings policies</p> <p>Maintain an up to date Asset register</p> <p>Draw up, agree and implement Business Continuity (Critical Incident Emergency Management Plan) for the Trust</p> <p>Support schools in the development of local business continuity/critical incident plans and where appropriate co-ordinate responses across the Trust to support pupil and staff safety and business continuity</p> <p>Provide Trustees with regular reports on compliance and risks arising from H&amp;S and estates management including actions taken and additional actions required</p>	<p>Implement the Trust H&amp;S policy</p> <p>Monitor the implementation of the Trust's H&amp;S and Lettings policies in the schools</p> <p>Monitor the accident book and report to the LAC regularly and agree appropriate actions</p> <p>Notify the CEO and LAC Chair promptly of any reportable or significant H&amp;S incidents and issues of concern including incidents of non-compliance</p> <p>Review security of premises and equipment</p> <p>Draw up, agree and monitor an accessibility plan for the school in consultation with the CEO</p> <p>Draw up, agree and implement a Business Continuity Plan (Critical Incident Emergency Management Plan) for the school</p> <p>Support the CEO in managing Trust wide critical incidents to support pupil and staff safety and business continuity across the Trust</p>