

Chorus Education Trust Schemes of Delegation - RACI Chart

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| KEY:     | <b>Chorus Education Trust Schemes of Delegation 2025-26</b>  |
| <b>R</b> | <b>Responsible</b> - The group or person(s) who actually carry out the task or process, responsible for getting the job done. Multiple groups or people may be responsible.                                  |
| <b>A</b> | <b>Accountable</b> - The person or group which is ultimately responsible for ensuring that the task or process is completed appropriately. Only one person / group can be accountable for a task or process. |
| <b>C</b> | <b>Consulted</b> - People or Groups that are not directly involved in carrying out the task or process, but who are consulted. May be a stakeholder or subject matter expert.                                |
| <b>I</b> | <b>Informed</b> - Not involved in carrying out a process or task, and not a decision maker, but have a need to stay informed   |

| Category                            |  | Delegation |             |                        |                               |                                |               |                |                          |                            |             | Comments  |
|-------------------------------------|--|------------|-------------|------------------------|-------------------------------|--------------------------------|---------------|----------------|--------------------------|----------------------------|-------------|---|
|                                     |  | Members    | Trust Board | Audit & Risk Committee | Finance & Resources Committee | Quality of Education Committee | S&L Committee | SYTH Committee | CEO / Accounting Officer | Local Governing Body (LGB) | Headteacher |   |
| Governance, Structures and Strategy | Members - Appointment and Removal  | A / R      | C           |                        |                               |                                |               |                | I                        |                            |             | Articles of Association 15A, 16, 18   |
|                                     | Members - Terms of Reference and role descriptors  | A / R      | C           |                        |                               |                                |               |                |                          |                            |             | Refer to Academies Handbook and NGA   |
|                                     | Trustees - Appointment and Removal   | A / R      | C           |                        |                               |                                |               |                |                          |                            |             | Articles of Association 50-56   |
|                                     | Trustees Chair and Vice Chair - Appointment and Removal  | A / R      | C           |                        |                               |                                |               |                | C                        |                            |             | Articles of Association 82-85, 90   |
|                                     | Trust Governance structure - To establish and review structure of Board committees (anually)   | I          | A / R       |                        |                               |                                |               |                | C                        |                            |             | Refer to Academies Handbook and NGA   |
|                                     | Trustees - Terms of Reference and role descriptors for Trustees/Chairs/ Committees   |            | A / R       |                        |                               |                                |               |                | C                        |                            |             | Terms of reference for all Trust Committees   |
|                                     | Board Committee Chairs - Appointment and Removal   |            | A / R       |                        |                               |                                |               |                | C                        |                            |             | Scheme of Governance and Terms of Reference   |
|                                     | Board Committee Vice Chairs - Appointment and Removal  |            | A           |                        | R                             | R                              | R             | R              | C                        |                            |             | Scheme of Governance and Terms of Reference   |
|                                     | Board Audit Committee - appointment of   |            | A / R       |                        |                               |                                |               |                |                          |                            |             | Scheme of Governance and Terms of Reference   |
|                                     | Board specific task Trustees - Appointment and removal of eg safeguarding, H&S   |            | A / R       |                        |                               |                                |               |                | I                        | I                          | I           | Scheme of Governance and Terms of Reference   |
|                                     | LGB Structure - To establish and review structure of Local Governing Bodies (LGB) and committees   |            | A / R       |                        |                               |                                |               |                | C                        | I                          | C           | Chorus LGB Membership Structure   |
|                                     | LGB Members - Appointment and Removal of LGB members (plus election processes where required)  |            | A / R       |                        |                               |                                |               |                | C                        | I                          | C           | Terms of Reference for LGBs   |
|                                     | LGB Chair / Vice Chair - Appointment and Removal   |            | A / R       |                        |                               |                                |               |                | I                        | C                          | I           | Terms of Reference for LGBs   |
|                                     | LGB specific task Governors - Appointment and removal of eg safeguarding, H&S, SEND, PP  |            |             |                        |                               |                                |               |                | A                        | R                          |             | Terms of Reference for LGBs   |
|                                     | Clerk to Trustees and Co Secretary - Appointment and Removal   |            | A / R       |                        |                               |                                |               |                |                          |                            |             | Articles of Association 81  |
|                                     | Clerk to LGB - Appointment and Removal   |            | A           |                        |                               |                                |               |                | R                        | C                          |             | Terms of Reference for LGBs   |
|                                     | Articles of Association - Propose amendments to the DfE for consent  | C          | A / R       |                        |                               |                                |               |                | C                        |                            |             | Companies Act 2006  |
|                                     | Articles of Association - Approve amendments to the following consent from the DfE   | A / R      | I           |                        |                               |                                |               |                | I                        |                            |             | Companies Act 2006  |
|                                     | Call meetings - To call an Annual General Meeting and other General Meetings as required   | A / R      |             |                        |                               |                                |               |                | I                        |                            |             | Articles of Association 19-20, Annual calendar of meetings produced summer term for following year  |
|                                     | Set vision and strategic objectives - of the Trust and Academies, agree KPIs   | I          | A / R       |                        |                               |                                |               |                | R                        | C                          | C           | Charitable Objects of the Company in Articles of Association, Trustees approve Chorus Improvement Plan, CEO approve Academy SIPs annually                 |
|                                     | Scrutiny - oversee implementation of strategy, measure progress to KPIs  | I          | A / R       |                        |                               |                                |               |                | R                        |                            | R           | HoS / Principal responsible at Academy level, CEO at Trust level  |
|                                     | Due diligence - Oversight and scrutiny of schools joining the Trust  |            | A / R       |                        |                               |                                |               |                | R                        |                            |             |   |
|                                     | Compliance Finance - with all requirements of Funding Agreement and Academy Trust Handbook   |            | A           |                        |                               |                                |               |                | R                        | I                          | R           | Master Funding Agreement, Academy Trust Handbook Headteacher responsible for compliance at school level   |
|                                     | Compliance Regulatory - with all relevant laws and regulations (e.g. charities law, company law, employment law, GDPR, Health and Safety laws)   |            | A           |                        |                               |                                |               |                | R                        | I                          | R           | Refer to legal as necessary, DPO etc  |
|                                     | Compliance Governance - completion of the register of interests, process to deal with conflicts of interest and related party transactions   |            | A           |                        |                               |                                |               |                | R                        | I                          |             | Accounting officer responsible for register for Members and Trustees  |
|                                     | Schemes of Delegation - Changes to the SOD   |            | A / R       |                        |                               |                                |               |                | C                        |                            |             |   |
|                                     | Skills audit - complete and recruit to fill gaps on Board of Trustees  |            | A / R       |                        |                               |                                |               |                | C                        |                            |             | NGA skills audit available  |
|                                     | Skills audit - complete and recruit to fill gaps on LGB  |            | A / R       |                        |                               |                                |               |                | C                        | C                          | C           | NGA skills audit available  |
|                                     | Performance Review Board of Trustees - self-review completed annually, externally year 3   |            | A / R       |                        |                               |                                |               |                |                          |                            |             | Academies Handbook and NGA  |
|                                     | Performance Review Chair of Board of Trustees - carry out 360 review periodically  |            | A / R       |                        |                               |                                |               |                | C                        | C                          |             | Chair of LGB consulted  |
|                                     | Board of Trustees committees member contribution - review annually   | C          | A / R       |                        |                               |                                |               |                | C                        |                            |             | Chairs annual report to Members, Chair to address non-attendance and non-contribution   |
|                                     | Trustees Succession - plan for Trustee replacement   |            | A / R       |                        |                               |                                |               |                | C                        |                            |             | Standing item on full board agenda for Chair to review  |
|                                     | Board of Trustees Annual schedule of business - agree  |            | A / R       |                        |                               |                                |               |                | C                        |                            |             | Board Annual standing Agendas set   |
|                                     | Performance Review LGB - Annual self review of LGB complete annually   |            | A           |                        |                               |                                |               |                |                          | R                          | C           |   |
|                                     | Performance Review Chair of LGB - carry out 360 review periodically  |            | A           |                        |                               |                                |               |                | C                        | R                          | C           | Link Trustee consulted  |
|                                     | LGB member contribution - review annually  |            | A           |                        |                               |                                |               |                | C                        | R                          | C           | Chair to address non-attendance and non-contribution of LGB memebrs   |
|                                     | LGB Governor Succession - plan for LGB member replacement  |            | A           |                        |                               |                                |               |                | C                        | R                          | C           | Standing item on full LGB agenda for Chair to review  |
|                                     | LGB Annual schedule of business - agree  |            | A           |                        |                               |                                |               |                | R                        | I                          | I           | LGB Annual standing Agendas set centrally   |
|                                     | Reporting Governance - Publication on Trust website of all required governance arrangements  |            | A           |                        |                               |                                |               |                | R                        |                            |             | DfE website requirements, Academy Trust Handbook - CEO responsible for Trust  |
|                                     | Reporting Governance LGB - Publication on Academy websites of all required LGB governance information  |            | A           |                        |                               |                                |               |                |                          |                            | R           | Head responsible for school LGB required information  |
|                                     | Reporting Annual Trustees Report - Prepare and publish Annual Report on the performance of the Trust on website and submit to ESFA   | I          | A           |                        |                               |                                |               |                | R                        |                            |             | Audited accounts Trustee Report - see Academies Accounts Direction  |
|                                     | Policies Trust Wide - Establish and implement central policies for Formal Complaints, Freedom of Information requests, SEND, Safeguarding and Child Protection, Curriculum, Behaviour, Admissions, Expenses, Health & Safety, Premises Management, Data Protection and Staffing policies including Capability, Discipline, Conduct and Grievance |            | A           | C                      | C                             | C                              | C             | C              | R                        | I                          | I           | Policies Matrix administered by Exec PA   |
|                                     | Policies school level - determine and approve those which reflect schools ethos & values, admissions, SEND, curriculum, behaviour  |            | A           |                        |                               |                                |               |                |                          | A                          | R           | Policies matrix administered by school/ exec PA   |
|                                     | Compliance Trust Risk Register - Establish, review and monitor Trust Risk Register, to manage and mitigate strategic risk  |            | A           | R                      |                               |                                |               |                | C                        | C                          | C           | CET Risk Register   |
|                                     | Compliance Business Continuity Risk - manage and mitigate through site Business Continuity and Critical Incident Plans   |            | A           |                        | C                             |                                |               |                | R                        | I                          | R           | CEO Responsible centrally, LGB Accountable at school level and Head responsible at school level   |
|                                     | Auditors - Appointment of Trust external auditors  | A          | R           | C                      |                               |                                |               |                | C                        | I                          | I           | 3 year appointment  |
|                                     | Internal Auditors - Appointment of Trust Internal Scrutiny Auditors  |            | A           | R                      |                               |                                |               |                | C                        | I                          | I           | Appointment every 3 years, Resources Cttee set programme every summer for following Academic Year   |
| Education and Curriculum            | Compliance Trust level auditing and reporting arrangements - agree internal scrutiny programme, QA & reporting eg safeguarding, H&S, employment, finance, IT   |            | A           | C                      | C                             | C                              | C             |                | R                        | I                          | I           |   |
|                                     | Compliance Trustee & Governor Training Programme   |            | A           |                        |                               |                                |               |                | R                        | C                          | C           | Central subscription, welcome & induction process issued - training Governor appointed for each school - Chair Responsibility                             |
|                                     | Establish and Implement School Improvement Plans for each Academy in line with Trust strategy and vision   |            | A           |                        |                               |                                |               |                | R                        | C                          | R           | The CEO develops School Improvement Plans with Heads in response to Chorus Improvement Plan and QA Information  |
|                                     | Agree and review KPIs related to educational performance of Academies  |            | A           |                        |                               |                                |               |                | R                        | C                          | R           | CEO and Head develop as part of the School Improvement Plans  |
|                                     | Quality of Teaching- ensuring appropriate levels of support, challenge and intervention to support the delivery of educational outcomes  |            | A           |                        |                               |                                |               |                | R                        | C                          | R           |   |
|                                     | Define the Curriculum for each Academy and review effectiveness  |            | A           |                        |                               |                                |               |                | R                        | C                          | R           |   |
|                                     | Pupil Premium- review and challenge the value for money of the PP grant in improving educational outcomes  |            | A           |                        |                               |                                |               |                | R                        | I                          | R           | DfE website requirements- pupil premium strategy statement published annually by 31st December  |
|                                     | Single Central Record  |            | A           |                        | C                             |                                |               |                | R                        | I                          | R           | DfE requirement- log all pre-employment checks, including DBS. Updated whenever new staff are recruited   |
|                                     | Agree PAN annually   |            | A           |                        |                               |                                |               |                | R                        | C                          | C           |   |
|                                     | Provision of Relationship and Sex Education  |            | A           |                        |                               | C                              |               |                | R                        | I                          | I           | Statutory requirements in the national curriculum   |
|                                     | Provision of RE  |            | A           |                        |                               | C                              |               |                | R                        | I                          | R           | Statutory requirements in the national curriculum   |
|                                     | Collective worship arrangements  |            | A           |                        |                               | C                              |               |                | R                        | I                          | R           |   |
|                                     | Attendance   |            | A           |                        |                               |                                | C             |                | R                        | C                          | R           |   |
|                                     | Safeguarding   |            | A           |                        |                               |                                | C             |                | R                        | C                          | R           | Director of Safeguarding updates Safeguarding Policy annually in response to the most recent Keeping Children Safe in Education advice                    |
|                                     | Suspensions  |            | A           |                        |                               |                                | C             |                | R                        | C                          | R           |   |
| Finance                             | School Hours- ensuring the minimum number of sessions per academic year  |            | A           |                        |                               |                                |               |                | R                        | I                          | R           |   |
|                                     | Term Dates   |            | A           |                        |                               |                                |               |                | R                        | I                          | R           | Follows Local Authority patterns  |
|                                     | Funding model - agree funding model that secures financial health in short/long term (management fee %, GAG pooling, central spend etc)  |            | A           |                        | C                             |                                |               |                | R                        | I                          | I           |   |
|                                     | Central Scheme of financial delegation - establish & review  |            | A           |                        | C                             |                                |               |                | R                        |                            |             | Financial procedures administration and control policy  |
|                                     | Schools Scheme of financial delegation - establish & review  |            | A           |                        | C                             |                                |               |                | R                        | I                          | I           | Financial procedures administration and control policy  |
|                                     | Trust Annual Budget - formulate and set central and Trust wide consolidated budget forecast  |            | A           |                        | C                             |                                |               |                | R                        |                            |             | Access finance & budgeting system , assumptions set centrally   |
|                                     | School Annual Budget - preparation for Board approval  |            | A           |                        | C                             |                                |               |                | R                        | C                          | R           | Access finance & budgeting system , assumptions set centrally   |
|                                     | Monitor - Trust financial performance against agreed budget - monthly MA's, cashflow forecast, balance sheet   |            | A           |                        | C                             |                                |               |                | R                        |                            |             | Monthly MA's produced and reviewed by CEO and Resources Chair- Access accounting system   |
|                                     | Monitor - School financial performance against agreed budget - monthly MA's, cashflow forecast, balance sheet  |            | A           |                        | C                             |                                |               |                | R                        | I                          | R           | Monthly MA's produced and reviewed by Headtescher - Access accounting system  |
|                                     | Reporting - financial KPIs and benchmarking value for money - setting and reviewing  |            | A           |                        | C                             |                                |               |                | R                        | I                          | I           | ICFP and VMFI tools   |
|                                     | Reporting - School performance v KPIs and benchmarking value for money   |            | A           |                        | C                             |                                |               |                | R                        | I                          | R           | ICFP centrally set KPIs   |
|                                     | Finance policies - establish & maintain compliant policies and procedures in line with reporting requirements  |            | A           |                        | C                             |                                |               |                | R                        | I                          | I           | Financial procedures administration and control policy - reviewed anually Academy Trust Handbook, Accounts Direction etc                                  |
|                                     | Compliance Financial Policies Central - oversight of controls, regularity, probity, VFM in relation to public funds  |            | A           |                        | C                             |                                |               |                | R                        | I                          | I           | Audit Cttee Trust Board, Chorus Financial procedures administration and control policy  |
|                                     | Prepare and implement trust-wide procurement strategies and efficiency programmes  |            | A           |                        | C                             |                                |               |                | R                        | I                          | I           | Financial procedures administration and control policy - reviewed annually  |
|                                     | Receive and respond to external auditor's annual report - statutory financial reporting  | A          | R           | C                      |                               |                                |               |                | R                        | I                          |             | Members receive at AGM  |
| HR                                  | Investments - agreeing policy, setting internal controls and annual plan   |            | A           |                        | C                             |                                |               |                | R                        |                            |             | Financial procedures administration and control policy - reviewed anually, investments reported at Board Resources Cttee                                  |
|                                     | Land & Premises Assets- Acquiring, disposing, or changing use  |            | A           |                        | C                             |                                |               |                |                          | C                          | C           |   |
|                                     | Fixed Asset Register - maintaining FAR   |            | A           |                        | C                             |                                |               |                | R                        |                            |             |   |
|                                     | Grant applications   |            | A           |                        | C                             |                                |               |                | R                        | I                          | R           | Refer to Financial procedures & finance schemes of delegation for limits  |
|                                     | Borrowing  |            | A           |                        | C                             |                                |               |                | R                        |                            |             |   |
|                                     | VAT  |            | A           |                        | C                             |                                |               |                | R                        |                            |             |   |
|                                     | CEO - Appointment and Removal of CEO and Accounting Officer  | I          | A / R       |                        |                               |                                |               |                |                          | I                          | I           | Articles of Association 107, Trust wide HR Policies, HR appointment form and letter/contracts   |
|                                     | Central Team CFO - Appointment and Removal for delivery of Academy Handbook and financial probity requirements   | I          | A / R       |                        | C                             |                                |               |                | R                        | I                          | I           | Trust wide HR Policies, HR appointment form and letter/contracts  |
|                                     | Central Team Senior Leaders - Appointment and Removal of COO and central executive leadership team   | I          | A / R       |                        | C                             |                                |               |                | R                        | I                          | I           | Growth plan and central team structure approved by Board, Trust wide HR Policies, HR appointment form and letter/contracts                                |
|                                     | Central Team Other Staff - Appointment and removal of other non-SLT staff eg cross Trust teachers, operational support staff   |            | A           |                        | C                             |                                |               |                | R                        | I                          | I           | Trust wide HR Policies, HR appointment form and letter/contracts  |
|                                     | Central Staffing Structure - Establish and implement organisational structures centrally to support the Trust and Academies  |            | A           |                        | C                             |                                |               |                | R                        | I                          | I           | CEO sets structure for central team   |
|                                     | School Headteacher - Appointment and Removal of Headteacher for each Academy   | I          | A / R       |                        |                               |                                |               |                | R                        | C                          |             | Articles of Association 107, Trust wide HR Policies, HR appointment form and letter/contracts   |
|                                     | School SLT - Appointment and Removal of Senior Leadership at Academy Level   |            | A           |                        |                               |                                |               |                | R                        | C                          | R           | Trust wide HR Policies, HR appointment form and letter/contracts  |
|                                     | School Other Staff - Appointment and removal of non-SLT school based/ line managed staff eg teachers, ed support, school admin support   |            | A           |                        |                               |                                |               |                | A                        |                            | R           | Trust wide HR Policies, HR appointment form and letter/contracts  |
|                                     | School Staffing Structures - Establish and implement school organisational structures  |            |             |                        |                               |                                |               |                | A                        | I                          | R           | Head responsible at school level for school roles which are not centrally line managed, under HR policies and guidance                                    |
| Operations                          | CEO - Performance Management   |            | A / R       |                        | C                             |                                |               |                | I                        |                            |             | CEO performance management procedure & committee of 3 trustees with advisor agreed anually  |
|                                     | School Headteacher - Performance Management of Headteachers  |            | A           |                        | I                             |                                |               |                | R                        | I                          | I           | Chorus Appraisal Policy & procedures  |
|                                     | Director of SYTH and Director of SCIT - Performance Management   |            | A           |                        | I                             |                                |               |                | R                        |                            |             | Chorus Appraisal Policy & procedures  |
|                                     | Trust wide HR policies and procedures - Establish, monitor and implement (Recruitment, pay, disciplinary, greivance, absence) in accordance with appropriate regulations   |            | A           |                        | C                             |                                |               |                | R                        | I                          | R           | Set centrally and Board/CEO accountable and responsible. Head responsible for implementing at school level and LGB accountable to monitor at school level |
|                                     | Appraisal and performance management policy and procedures - setting and pay progression, in line with Trust Pay Policy and all statutory regulations  |            | A           |                        | C                             |                                |               |                | R                        | I                          | I           | Appraisal policy and procedures CEO responsible for setting and in respect of central SLT and Heads.  |
|                                     | Appraisal and performance management - school implementation of process and pay progression for staff (except Headteacher)   |            | A           |                        | C                             |                                |               |                | C                        | I                          | R           | Head responsible for implementing at school staff level and LGB informed  |
|                                     | Terms and Conditions of Employment - Central Staff Handbook  |            | A           |                        | C                             |                                |               |                | R                        | I                          | I           | Trust Employment Contracts, Trust Staff Handbook - each site may have own operational site specific staff handbook  |
|                                     | Annual Review of Salaries and Pay Increases - in line with Pay Policy and statutory regulations  |            | A           |                        | C                             |                                |               |                | R                        | I                          | I           | STCPD Teachers, NJC Support Staff   |
|                                     | CEO - Annual Pay Award agree   |            | A / R       |                        | C                             |                                |               |                | I                        |                            |             | CEO Pay procedure, Pay Policy (appraisal delinked from pay)   |
|                                     | Headteacher - Annual Pay Award agree   |            | A           |                        | C                             |                                |               |                | R                        | I                          | I           | Pay Policy (delinked from appraisal)  |
|                                     | Disciplinary and Grievance Policies - review   |            | A           |                        | C                             |                                |               |                | R                        | I                          | I           |   |
|                                     | Central - Organisational restructuring   |            | A           |                        | C                             |                                |               | C              | R                        |                            |             | Board ratification required,CEO notified before process begins, central HR involved   |
|                                     | School - Organisational restructuring  |            | A           |                        | C                             |                                |               |                | R                        | I                          | R           | Board ratification required,CEO notified before process begins, central HR involved   |
|                                     | Central Services - Determining and allocating central services provided to the Academies centrally   |            | A           |                        |                               |                                |               |                | R                        | I                          | C           |   |
|                                     | Central Services - Overseeing the effectiveness of services provided centrally   |            | A           |                        |                               |                                |               |                | R                        |                            | C           |   |
|                                     | Insurance cover - Ensuring that the Trust and Academies have all necessary insurance in place  |            | A           | C                      |                               |                                |               |                | R                        | I                          | I           | Financial   |
|                                     | Media & PR - Overseeing public relations activities to present the activities of the Trust and Academies to the Media and wider community  |            | A           |                        |                               |                                |               |                | R                        | I                          | C           |   |
|                                     | Stakeholder engagement - Chorus centrally  | I          | A           | C                      | C                             | C                              | C             | C              | R                        |                            |             |   |
|                                     | Stakeholder engagement - school level local community  |            |             |                        |                               |                                |               |                | C                        | A                          | R           |   |
|                                     | Chorus Website   |            | A           |                        |                               |                                |               |                | R                        |                            |             |   |
|                                     | School prospectus & website  |            | I           |                        |                               |                                |               |                | A                        | I                          | R           | Centrally templated prosectus & website   |
|                                     | Asset & premises strategy - determining use of premises and ensuring adequate maintainance   |            | A           |                        | C                             |                                |               |                | R                        | I                          | C           | LGB & Headteacher consulted at school level   |
|                                     | IT strategy - determining strategy, use of systems and adequately maintained and lifecycle'd equipment   |            | A           |                        | C                             |                                |               |                | R                        | I                          | C           | LGB & Headteacher consulted at school level   |
|                                     | Compliance FOI requests and complaints - central   |            | A           |                        |                               |                                |               |                | R                        |                            | I           | Chorus FOI and SARS procedures, Complaints Procedure  |
|                                     | Compliance FOI requests and complaints - school  |            | A           |                        |                               |                                |               |                | C                        | I                          | R           | Chorus FOI and SARS procedures, Complaints Procedure  |
|                                     | Legal Claims - with potential impact on reputation   |            | A           | C                      |                               |                                |               |                | R                        | I                          | I           | In respect of non staffing claims, legal claims re staffing dealt with in line with Risk Register   |