



MOSAIC
LEARNING TRUST
Raising Aspirations,
Empowering Futures

TRUST SCHEME OF DELEGATION

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Contents

1.	Introduction	3
2.	Vision, Mission And Values	3
3.	Governance Model	3
4.	Governance Handbook	5
5.	Areas Of Delegation	5
6.	Delegated Authority	5
7.	Audience	6
8.	Approval And Renewal	6
9.	Acronyms	6
10.	Trust Scheme Of Delegation Table	7
11.	Financial Delegation Limits	17

1. Introduction

As a Multi-Academy Trust (MAT), the Trust Board of Mosaic Learning Trust is accountable, in law, for all major decisions concerning the academies.

The Trust Board is not required to carry out all the Trust's governance functions and many can, and should, be delegated to the CEO & Executive Team and established sub-committees. The decision to delegate a function is made by the Trust Board. Without such delegation, the individual or Committee has no power to act.

The Trust Scheme of Delegation (TSoD) is the key document that defines lines of responsibility and accountability in a MAT to ensure the Members, Trustees, Trust Board Sub-Committees, Local Governing Bodies (LGBs), Executive Leadership and Headteachers understand their roles and responsibilities.

The overarching TSoD for decision making in the Trust should not be confused with the written Scheme of Delegation of financial powers referred to in the Department for Education (DfE) Academy Trust Handbook.

2. Vision, Mission and Values

This document is underpinned by our core educational vision, our clear mission statement and our unwavering commitment to our core values:



Raising Aspirations, Empowering Futures



Inspiring Learning



Driven by Ambition



Empowering People

3. Governance Model

The Trust Board is responsible for the delivery of the 5 pillars of Academy Trust Quality set out in the Department for Education's (DfE) Academy Trust Governance Guide:

- a. High-quality and inclusive education
- b. School improvement
- c. Workforce
- d. Finance and operations
- e. Governance and leadership

The Trust Board appoints the Chief Executive Officer (CEO), to whom it delegates responsibility for delivery of the vision and strategy of the Trust. The CEO is held to account for the conduct and performance of the Trust, including the performance of the schools and any subsidiary company within the Trust, and for financial management.

The CEO manages the Chief Operating Officer, Chief Financial Officer and Director of School Improvement, carrying out their performance management and setting their targets.

The Trust Board has established Board Committees with delegated powers for Finance, Audit & Risk (Asset Board) and Education Standards (Standards and Safeguarding Board). At least three Trustees sit on each Board Committee, with each having clear, specific Terms of Reference.

Local Governance/Academy Committees are known as Local Governing Bodies (LGBs) within Mosaic Learning Trust. The LGBs also have clear Terms of Reference detailing the committee’s composition, remit and meeting requirements.

LGB Chairs are invited to meet the Chair of Trustees before each Trust Board meeting throughout the year for a Chairs’ Briefing.



Members

Mosaic Learning Trust Members appoint Trustees to ensure that the Trust’s charitable objects are carried out. They are able to remove Trustees if they fail to fulfil this responsibility. Members are responsible for approving any amendments made to the Trust’s Articles of Association. There must be at least three Members, although the DfE prefers at least five. There must be a separation of powers between the Members and the Trust Board. Members are not permitted to be employees of the Academy Trust. The DfE Governance Handbook states that each Trust determines how best to keep Members informed so they can be assured that the Board is exercising effective governance and leadership of their Trust. The Trust reports formally to Members through the Annual General Meeting (AGM) plus an additional annual Members meeting.

Trustees

Mosaic Learning Trust, as a Multi-Academy Trust (MAT) is a charitable company and so Trustees are both charity Trustees (within the terms of section 177(1) of the Charities Act 2011) and Company Directors. Trustees are bound by both charity and company law. The terms ‘Trustee’ and ‘Director’ are often used interchangeably. Mosaic Learning Trust uses the term ‘Trustee’ as it avoids the possible confusion caused when Executive Leaders are classified as Directors. The Trustees are responsible for the general control and management of the administration of the Trust and, in accordance with the provisions set out in the Memorandum and Articles of Association, its Funding Agreement and the Academies Trust Handbook, they are legally responsible and accountable for all statutory functions, for the performance of all schools within the Trust, and for the approval of a written Scheme of Delegation of financial powers that maintains robust internal control arrangements. The Trust Board is legally responsible and accountable to the Department for Education (DfE). The Board of Trustees has the right to review and adapt its governance structure at any time which includes removing any delegation. Trustees must adhere to the Mosaic Learning Trust Code of Conduct.

Chief Executive Officer and Executive Leadership Team

The CEO has the delegated responsibility for the operation of the Trust including the performance of the Trust’s schools. The CEO leads the Trust’s Executive Leadership Team and is accountable for its performance. The CEO is the Accounting Officer with overall responsibility for the operation of the Trust’s financial responsibilities and must ensure that the organisation is run with financial effectiveness, stability and probity. The Chief Financial Officer reports to the CEO. The Chief Financial Officer (CFO) is the Trust’s Finance Director with delegated responsibility for the Trust’s detailed financial procedures.

Headteacher

The headteacher is responsible for the day-to-day management of their school, reporting to the CEO. They report to the Standards and Safeguarding Board, as applicable, on matters that have been delegated by the Trust Board.

Local Governing Bodies

In the context of a MAT, the performance of every individual school is ultimately the responsibility of the Board of Trustees. The Board discharges this responsibility, primarily, through the function of the Executive Leadership Team of the Trust, who themselves are responsible (to the Board) for the performance of school leadership.

This is reinforced by the work of the Local Governing Bodies (LGBs), which are formal sub-committees of the Board, and have a brief to review and challenge performance at the working level in each school, independently of Trust management.

4. Governance Handbook

The Governance Handbook is intended to show the outline structure for the governance of Mosaic Learning Trust to provide for the discharge of statutory responsibilities and maintain the main focus on culture and engagement, governance of the Trust, strategy, non-executive leadership, executive leadership, accountability and compliance as highlighted in the DfE Academy Trust Governance Guide.

5. Areas of Delegation

This Trust scheme of delegation is structured in accordance with the following areas:

- a. Strategy and Leadership
- b. Education and Curriculum
- c. Financial Management
- d. Human Resources
- e. Operations

6. Delegated Authority

The key responsibilities and decision-making authority referred to in the scheme of delegation table are:

KEY (based on the RACI framework)				
R = RESPONSIBLE	A = ACCOUNTABLE	C = CONSULT	I = INFORMED	S = SUPPORT
The individual/group that has responsibility for undertaking or completing the task delegated to them and reporting on its delivery at suitable intervals. In the case of the CEO, this reporting will be at Board level. In the case of the Principal/Head, this will	The individual/group that has the ultimate or final responsibility for ensuring completion of the task. This will include determining how the Trust and/or Academies (as appropriate) should undertake the task including determining	The individual/group that should be consulted as part of the process of completing the task because they can provide valuable advice and/or input.	The individual/group that should be kept up-to-date about the progress of the task and/or the decisions in the task.	The individual/group who should provide support during the implementation of the task.

be at School LGB level.	appropriate milestones and targets to be reported against.			
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7. Audience

This document is designed for use by key governance stakeholders within the Trust as well as externally. It will be made available on the Trust website.

8. Approval and Renewal

The Mosaic Learning Trust scheme of delegation will be reviewed at least annually and approved by the Trust Board, so that the roles and responsibilities can be updated to reflect organisational priorities, good practice and updates to requirements or legislation.

9. Acronyms

The following acronyms are used in this document:

- ATH - Academy Trust Handbook
- Articles - The Articles of Association
- CEO - Chief Executive Officer
- DfE - Department for Education
- DSL - Designated Safeguarding Lead
- DBS - Disclosure and Barring Service Checks
- DFE – Department for Education
- EYFS - Early Years Foundation Stage
- KPIs - Key Performance Indicators
- LGB - Local Governing Body
- SEF - Self Evaluation Form
- SEND - Special Educational Needs and Disability
- SDP - School Development Plan

10. Trust Scheme of Delegation Table

Accountable	Responsible	Inform	Consult	Support
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Where any actions specifically link to the Chair of LGB/Trustees, in their absence the Vice Chair can make the decision.

*In schools causing concern, the Trust may override some of the LGB or Headteacher responsibilities.

** This may also be supported by the DSI/CEO where appropriate.

Governance Framework - Strategy and Leadership				
STRATEGY	Trustees	CEO	LGB	Headteachers
Set strategic priorities/KPIs for the Trust	A	R	I	I
*Set strategic priorities/KPIs for the schools	I	S	A	R
Set the vision, values, mission and values of the Trust	A	R	I	I
Set the vision, values, mission and values of the schools	I	S	A	R
Setting expectation for Trustee's conduct	A/R			
Fostering equality, diversity and inclusion including building a diverse board	A/R			
Ensuring transparency	A/R			
Engaging with stakeholders and religious authorities	A	R		
Adhering to the articles of association	A	R		

SCRUTINY	Trustees	CEO	LGB	Headteachers
Scrutiny: Performance – review & challenge progress of the Trust against its strategic priorities and KPIs	A	R	I	I
*Scrutiny: Performance – review & challenge progress of the school against its strategic priorities and KPIs	I	S	A	R
Scrutiny: Ethos – operation of the Trust against the agreed vision, mission & values	A	R	S	S
*Scrutiny: Ethos – operation of the school against the agreed vision, mission & values	I	S	A	R
Scrutiny: to raise concerns regarding Trust issues	A	R	S	I
*Scrutiny: to raise concerns regarding local issues	I	S	A	R
COMPLIANCE	Trustees	CEO	LGB	Headteachers
Compliance: Funding Agreement – comply with all obligations including the Academies Trust Handbook	A	R	I	S
Compliance: Regulatory – with all regulations affecting any school in the Trust (including all charity law, company law, SCR, GDPR, employment law and health and safety)	A	R	I	S
Compliance: Financial Oversight - ensuring that there are appropriate financial controls so that there is regularity, probity and value for money in relation to the management of public funds	A	R	I	S
Compliance: Financial Oversight – ensuring cash balances and reserves enable the Trust to be financially solvent.	A	R	I	S
Compliance – completing the register of business interests and put in place a procedure to deal with any conflicts of interest and connected party transactions	A	R	R	S

Ensure compliance with the SEND Code of Practice	A	R	I	R
Monitor Pupil Premium spending and PE & Sport premium	A	R	I	R
REGISTERS	Trustees	CEO	LGB	Headteachers
Register of Interests- keep a published and accurate register	A	R	S	S
Trust Risk Register - keep a published and accurate register	A	R	I	I

TRUSTEE/LOCAL GOVERNING BODIES	Trustees	CEO	LGB	Headteachers
Appointment of 7 Trustees to the Board by the Members	R			
Appointment of 6 Trustees to the Board	A/R			
Appointment of Lead Trustees for Safeguarding, SEND and Careers	A/R			
*Appointments of Local Governing Bodies – ensuring processes in place for appointment of LGBs (including ensuring that the LGBs have the skills to run the schools)	A	I	R	S
Appointment of Chair, Vice Chairs and Committee Chairs for Trust and LGBs	A/R	C	R	
Appointment of Trust Governance Professional	A/R	C		

Prepare terms of reference for Committees	A	R		
Prepare terms of reference for LGB	A	C	R	S
Training programme for Trustees	A	R		
Training programme for LGBs	C	A	R	S
Appointment of Audit & Risk Committee	A/R	S	I	I
POLICIES	Trustees	CEO	LGB	Headteachers
Review and approval of Trust Wide Policies and Statements (including e.g. admissions, safer recruitment, charging and remissions policies, health & safety, safeguarding, whistle blowing policy and equality objectives, etc)	A	R	C	I
*Review and approval of School Policies and Procedures (including e.g. admissions, behaviour, SEND, health & safety and safeguarding in line with any overarching Trust policies)	I	C	A	R
TRUST GROWTH	Trustees	CEO	LGB	Headteachers
Trust growth	A	R	I	I

Governance Framework - Education and Curriculum

COMPLIANCE	Trustees	CEO	LGB	Headteachers
*School Development Planning	I	S	A	R
Key Performance Indicators – setting and reviewing performance of the Trust & the schools	A	R	I	S

Quality of Teaching - ensuring appropriate levels of support, challenge and intervention to support delivery of education outcomes	I	S	A	R
*Curriculum – setting the curriculum for the schools (including curriculum policy)	I	C	A	R
*Curriculum – reviewing effectiveness of curriculum	I	R	A	R
PUPIL ISSUES	Trustees	CEO	LGB	Headteachers
*Pupil issues (including attendance, SEND, suspensions/exclusions, punctuality and disciplinary matters for each school)	I	S	A	R
*Ensure school lunch provided to appropriate nutritional standards	I	C	A	R
SAFEGUARDING	Trustees	CEO	LGB	Headteachers
*Ensuring each school has appointed a designated safeguarding lead, ensuring compliance with statutory guidance and maintenance of single central record. Trust central team CEO responsible for	I	S	A	R
Ensuring compliance with statutory guidance and maintenance of single central record for the Trust central team	A	R		
STAKEHOLDER ENGAGEMENT	Trustees	CEO	LGB	Headteachers
*Promoting partnership working between parents/carers and the schools (including undertaking consultation with pupils, parents/carers and other stakeholders and ensuring that such feedback is used to support the development of best practice and to promote the quality of the overall pupil experience)	A	C	S	R
SCHOOL OPERATIONS	Trustees	CEO	LGB	Headteachers
Setting term dates	C	A	I	R

School Hours -setting the opening and closing times for the Schools	C	A	I	R
Setting uniform policy	C	A	I	R
ADMISSIONS	Trustees	CEO	LGB	Headteachers
Admissions decisions	A	C	S	R
OFSTED/	Trustees	CEO	LGB	Headteachers
Ofsted Inspections Trust Support: <ul style="list-style-type: none"> ▪ Trustees will liaise with Ofsted where the MAT is inspected ▪ The CEO will ensure Trust is prepared for inspection and manage the process from a Trust perspective where the impact of the Trust is under review 	A	R	I	S
Ofsted Inspections: school level The CEO and appropriate Trustees will support Local Governing Body and Headteacher for individual school inspections	S	S	A	R

Governance Framework - Financial Management				
COMPLIANCE	Trustees	CEO	LGB	Headteachers
Appointment of Accounting Officer	A/R	I	I	I
Appointment of Chief Operating Officer and Chief Financial Officer	A	R	I	I
Recommend appointment of External Auditors to Members	A/R	S	I	I
Appointment of Internal Auditors	A/R	S	I	I

Ensure completion of internal audit	A	R	I	S
Agreeing a funding model across the Trust and to develop an individual funding model for the schools, so as to secure the Trust's financial health in the short-term and the long-term	A	R	I	C
Formulating and setting the Trust-wide budget	A	R	I	S
Formulating and determining the proportion of the overall budget to be delegated to each school (including the use of contingency funds/balances)	A	R	I	I
Submission of Annual Budgets to DfE	A	R		
Establishing policies and procedures to ensure compliance with the Trust's financial and reporting requirements	A	R		
Agreeing the investment policy in line with the Academies Financial Handbook and the Financial Delegation	A	R		

Governance Framework				
HUMAN RESOURCES	Trustees	CEO	LGB	Headteachers
Headteacher/Shared Service Team Staff Development and Well Being	C	A/R	I	
Staff Development and Well Being	C	A	S	R
Appoint/dismiss/suspend CEO	A/R			
*Appoint/dismiss/suspend Headteachers/Heads of School at each school	C	A/R	R	I

Appoint/dismiss/suspend cross-Trust and Shared Services Team (in line with recruitment policy)	C	A/R	I	I
*Appoint/dismiss/suspend School SLT (excluding Headteacher)	I	S	A	R
*Appoint/dismiss/suspend Data Protection Officer	A	R	I	I
**Appoint/dismiss/suspend any existing school staff (internal recruitment)	I	C	A	R
*Appointment of external school staff	I	C	A	R
To determine pay progression/scale for CEO	A/R			
To determine pay progression/scale for Senior Executive Officers	A	R		
To determine pay progression/scale for Central Leadership Team (including Headteachers)	I	A/R	I	I
To determine pay progression/scale for Shared Services Team		A/R		
*To determine pay progression/scale for school-based staff	I	C	A	R
*Restructuring of school staff	A	R	I	R
Restructuring of cross-Trust and Shared Services Team	A	R	I	I
Performance management of CEO	A/R			
*Performance management of Headteachers		A/R	C	
*Performance management of Shared Services Team		A/R		
*Performance management of school-based staff		I	I	A/R
Establishing Trust wide HR Policies (including recruitment, discipline, capability, grievance and absence policies) in accordance with all appropriate regulations	A	R	I	I

Setting Terms and Conditions of Employment and Staff Handbook	A	R	I	I
Setting Appraisal Performance Management Policy together with pay reviews (in line with the Trust's pay policy and all statutory regulations)	A	R	C	I
Reviewing discipline and grievance policy	C	A/R	I	I

Governance Framework – Operations

PROCUREMENT	Trustees	CEO	LGB	Headteachers
Setting trust wide procurement policies (for suppliers including auditors, HR and payroll providers and solicitors) in accordance with the Funding Agreement, Academies Financial Handbook and the Trust's procurement policy	A	R	I	I
Setting school specific procurement policies - in accordance with the Funding Agreement, Academies Financial Handbook and the Trust's procurement policy	A	R	I	I
Enter into contracts – up to limit of delegation set out in Financial Delegation below	A	R	I	S
Determining and allocating shared services provided to the schools by the Trust	A	R	I	C
SHARED SERVICES, PREMISES AND ASSETS	Trustees	CEO	LGB	Headteachers
Overseeing the effectiveness of services provided centrally by the Trust	A	R	S/I	S/I
Arranging insurance for the Trust	A	R		
*Changing use of Assets	A	R	C	C
Develop the Trust estates strategy	A	R		
Procuring/disposing of new buildings/land in line with procedures and regulations	A	R		

Maintain buildings, inc. properly funded maintenance programme	A	R	I	S
Appoint person in charge of first aid in schools	I	I	A	R
Set Health and Safety Policy	A	R	I	S
Respond to Health and Safety incidents in schools	I	C/S	A	R
*Review school risk assessments	I	R	A	R
*Asset and Premises Maintenance Strategy – determining use of schools’ premises and ensuring premises are adequately maintained	A	R	C	S
MEDIA AND PR	Trustees	CEO	LGB	Headteachers
Media and PR - overseeing public relations activities to project the activities of the Trust to the wider community	I	A/R	I	S
Media and PR - overseeing public relations activities to project the activities of the school to the wider community	I	S	C	A/R
Information management – including adopting and following policies for information security and compliance with FoI and DPA legislation and maintaining accurate records (staff, student)	A	R	S	R

11. Financial Delegation Limits

The Trust has set the following scheme of financial delegation for revenue expenditure, contracts and virements:

AMOUNT:	APPROVAL BY:	RATIFICATION BY:
Up to £5k	Budget Holder / School Business Manager / School Operations Manager	N/A
£5 - £10k *	Head Teacher	N/A
£10k-£50k **	Local Governing Body	Board of Trustees
£50k -£170K ***	Board of Trustees Must be supported with a professional judgement	N/A
above £170,000 ****	Board of Trustees	N/A

- * Ensure 3 verbal or written quotes have been obtained and recorded
- ** Ensure 3 written quotes have been obtained and recorded
- *** Ensure procurement processes have been followed, must consult with the CFO
- **** Ensure OJEC tender processes have been followed, must consult with the CFO

In terms of capital expenditure, the following limits will apply:

CAPITAL	APPROVAL	RATIFICATION
Up to £10k	Head Teacher	N/A
£10k -£50k	Local Governing Body	Board of Trustees
Above £50k	Board of Trustees	N/A