

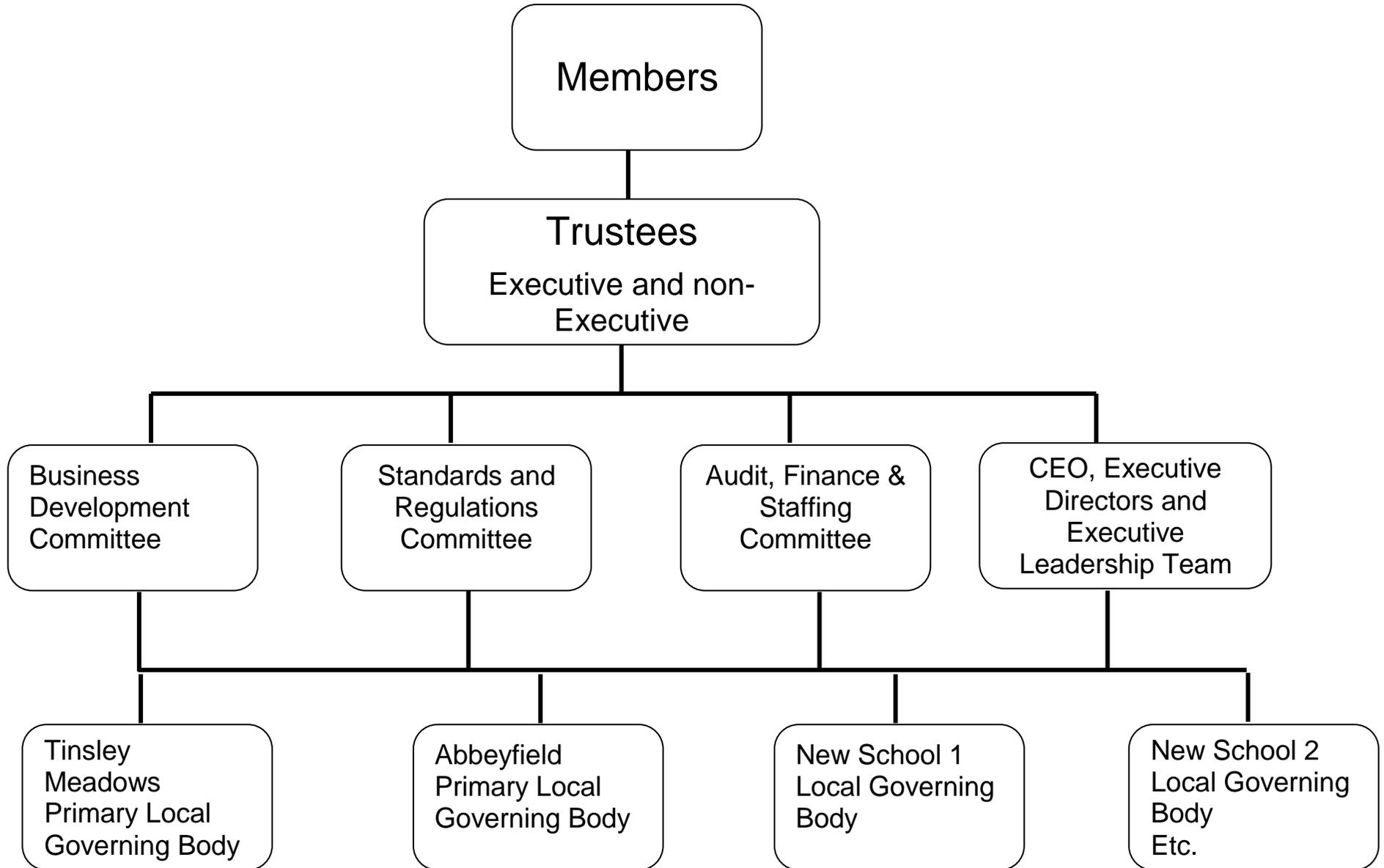
Five Rivers Multi-Academy Trust
Scheme of Reservation and Delegated Authority

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Overall Structure



1 Non-Executive Directors

Non-Executive Directors are responsible for ensuring that the:

- annual accounts for the MAT are filed with Companies House by the due date;
- annual return for the MAT is filed with Companies House by the due date;
- Companies House is notified of any changes to the directors (additions or resignations);
- Companies House is notified of any change to the address of the MAT

*these responsibilities will all be delegated to the CEO and Executive Director(s)

1.1 Membership

Muriel Eddowes (Non Executive Director))

Sheila Sutherland (Non Executive Director)

Di Chilvers (Non Executive Director)

2 Members

The members are equivalent to the shareholders of the Academy Trust, a charitable company. They have ultimate control over the Academy Trust with the right to amend the Trust's Articles of Association.

Members are responsible for:

- the appointment of trustees;
- ensuring the governance structure is fit for purpose;
- holding the Trustees to account.

2.1 Membership

- Sue Hunter
- Dr Paul Owen
- Darren Pearce

3 Trustees

The Trustees are equivalent to the directors (Executive and Non-Executive) of the Academy Trust, a charitable company and must comply with company law requirements.

The trustees are responsible for setting the direction of the Academy Trust, holding the Chief Executive Officer (CEO) to account and ensuring financial probity. As charity trustees, they must also ensure that they are complying with charity law requirements.

Trustees have a number of areas of work:

Strategy and Planning:

- establishing and steering the Trust's clarity of purpose;
- scrutinising plans for growth or consolidation;
- education policy;
- information systems;
- Human Resource Management

Governance:

- overseeing effective governance and decision-making;
- internal control and managing risk: ensuring that the Trust is meeting its statutory and legal responsibilities.

Financial stewardship:

- ensuring the trust is financially competent and has a sustainable budget;
- audit;
- asset management;
- fundraising.

Performance:

- ensuring pupils are gaining the best education and experience possible;
- putting in place effective leadership and holding the executive leadership to account;
- performance management.

3.1 Strategy and Planning:

The Board of Trustees is responsible for:

Approval of the Trust's:

- vision, mission and values;
- strategic direction;
- strategic and annual operating plans and budgets;
- Education Policy;
- communications and systems for ensuring effective stakeholder engagement;
- Quality Assurance framework.

Approval of the Development Plans, Post Inspection Action Plans and/or School Improvement Plans of the individual academies in the MAT.

Monitoring of the policy implementation and decision making on action required.

Approval of Information Systems Strategy and Policy.

Approval of HR Strategy and Policies

Final appeals for all staff under the Disciplinary and Grievance Policy.

Appointment of the Trust's main legal advisers, investment advisers, & approving the terms of their appointment.

3.2 Governance:

The Board of Trustees is responsible for:

Review and approval of governance arrangements including:

- the schedule of Trust Board meetings and the format of the agendas;
- approval of the minutes;
- Trust Committee structures and terms of reference including those of the Local Governing Body (LGB);
- timing and transition arrangements for an AIB to be replaced by an LGB;

- levels of delegated authority including limits of financial authority;
- policy on Trustee Induction and Appraisal;
- Trust Board review and development;
- Trustee Code of Conduct and Conflict of Interest Policy;
- appointment of:
 - Trustees;
 - the Chair of Trustees;
 - Committee Chairs and Members
- the right to determine the composition of the Local Governing Bodies (LGB) but will normally ordinarily exercise the right to appoint two trustees as Chairs and Vice Chairs of the LGBs;
- the election of a designated officer to carry out an initial review of new Governing Bodies

Internal control and managing risk:

Approval of the Trust's systems of internal control including policies on:

- health and safety;
- data protection;
- fraud prevention and detection;
- whistle blowing
- safeguarding

and decision on action required.

Approval of the Trust's risk management strategy and twice yearly review of:

- major risks;
- health and safety reports;
- safeguarding

and decision on action required.

Appointment of Trust's Responsible Officer and Accounting Officer;

Decision making on any other matter or prospective transaction which might reasonably be expected to expose the Trust to significant reputational, business, financial, legal or other risk.

3.3 Financial Stewardship:

The Board of Trustees is responsible for:

Approval of Financial Regulations/Standing Orders.

Approval of:

- opening/closing of bank accounts and cheque signatories;
- all loan agreements (including overdraft facilities, mortgages or other collateral or security);
- within budget revenue expenditures over £50,000.
- all unbudgeted revenue expenditures over £25,000;

Covenants on prospective restricted donations.¹

Approval of the Trust's Reserves Policy.

Approval of Investment Strategy and Policy.

Monitoring and review of financial performance of the Trust and decision making on action required.

Audit:

Appointment of external auditors and approval of changes to auditors' terms of engagement.

Review of external auditors management letter and decisions re action on issues arising.

Approval of the Annual Report and Accounts.

Asset Management:

Approval of the sale, purchase or disposal of any capital asset over £50,000 in value in line with provisions of the Funding Agreement.

Fundraising

Approval of the Trust's Fundraising Strategy and Policy.

¹ To be reviewed in revised Financial Standing Orders

3.4 Performance:

The Board of Trustees is responsible for:

Pupil outcomes and experience:

Monitoring pupil performance in each school in the Trust against a range of agreed measures, both formal and informal;
Ensuring that there are effective channels of communication between pupils and carers and the Trust Board members.

Ensuring effective leadership:

Appointment of the CEO and other Trust Senior Managers.

Approval of the structure of the Trust's Executive Leadership Team (beyond the school) and each schools' SLT and staffing complement.

Nomination of Trustees to support the CEO in the recruitment of Executive Team members/Schools SLT and approval of these appointments.

Review of the Trust Board skills requirements and recruitment of new Trustees to meet identified objectives.

Monitoring the effectiveness of the executive leadership against the agreed objectives of the Trust.

Performance Management:

Approval of the Trust's performance management and reporting framework including key performance indicators.

Monitoring of performance in implementing the strategy and managing the Trust, and decision-making on action required.

Approval of the Trust's Complaints Policy and decision making on appeals in line with the policy.

Approval of Policies for the Reward and Remuneration Strategy and annual pay award.

Approving a policy for the Executive Team's appraisal

Approving performance pay awards (or otherwise) of CEO following recommendations from the Remuneration Committee.

3.5 Delegation to the Chair and/or Vice Chair

Matters delegated to the Chair and/or Vice Chair of the Board of Trustees:

Strategy and Planning

Recommending a policy and procedure for the CEO's appraisal.

Leading in the process of recruiting the CEO and making recommendations to the Trust Board re an appointment.

Governance

- approval of Trust Board agendas and draft minutes for circulation to the Trust Board;
- final decision on interpretation of any aspects of the operation of the Trust Board or its Committees;
- recommendation to the Trust Board re: Committee Chairs and Members (including Chair and Vice Chair of the LGBs).

Financial Stewardship

Authorisation of payment/signature of cheques in line with Financial Regulations/Standing Orders

Performance Management

Either directly or, by nominating a relevant Trustee, setting and reviewing the CEO's objectives, carrying out a performance appraisal on behalf of the Trust Board and reporting on this to the Trust Board.

3.6 Membership of the Board of Trustees:

Di Chilvers (Non Executive Director)
Muriel Eddowes (Non Executive Director))
Joel Hardwick (Non Executive Director)
Antony Hughes (LAAP / Non Executive Director)
Raj Joshi (Non Executive Director)
Marc Rowland (Chair)
Sheila Sutherland (Non Executive Director)
Rebecca Webb (CEO)
Emma Farmer (Executive Director – Business Strategy)

4 Committees of the Board of Trustees

Committees will be deemed to be quorate when three trustees are present. Virtual or remote attendance (Skype, telephone or via other ICT links) will be accepted.

Chairs of Committees will be elected at the first meeting of the committee. This will be reviewed annually thereafter as part of the business of the Committee.

4.1 Business Development Committee

The purpose of the Business Development Committee (BDC) is to make recommendations to the Trust Board in relation to the onward development and future growth of the MAT.

Strategy and Planning

The committee will:

- develop plans for the MAT's strategic growth model in liaison with the Finance and Audit Committee (top slicing arrangements), and develop income generating plans
- oversee the strategic planning for the Multi Academy Trust in line with the MAT's growth model as agreed by the Trust Board
- develop options, appraisals and proposals for the Trust Board in relation to the future sponsorship of Academies within the MAT
- horizon scan to keep abreast of the national direction of travel and make recommendations to the Trust Board accordingly
- agree the MAT's corporate image, branding and marketing plans
- develop a school improvement function
- develop strategic partnerships
- actively seek out research projects and national policy development projects that directly relate to and have the potential to benefit Five Rivers Multi Academy Trust.
- agree a suite of corporate policies to be adopted by all Academies within the MAT and monitor adherence to these in partnership with the Standards and Regulations Committee and the Finance and Audit Committee.
- develop and monitor the strategic risk register for the MAT; reporting significant risks to the Trust Board as appropriate

Governance

The committee will:

- support and develop the Executive Leadership Team in the creation, implementation and monitoring of the Academy Trust's self-evaluation.

4.1.1 Membership

Muriel Eddowes

Joel Hardwick

Antony Hughes

Marc Rowland

Emma Farmer

Becky Webb

4.2 Standards and Regulations Committee

The purpose of the Standards and Regulations Committee (SRC) is to monitor the performance of the MAT and the performance of Academies within the MAT. To hold academies to account for effective governance and high performance.

The committee will:

- ensure that the highest possible standards are set and maintained across the Academy Trust
- receive a termly report from the Executive Leadership Team regarding standards and performance of the Academy Trust against key performance indicators
- identify any areas of concern in respect of standards and performance and implement an action plan with the Executive Team
- ensure that the Academy Trust's curricula are balanced and broadly based. This will require an annual statement from the CEO confirming that the academies are compliant.
- ensure that effective processes are in place for the quality assurance of teaching and learning, the curriculum, inclusion and the sharing of good practice across the Academy Trust
- support the Chief Executive Officer in the creation, implementation and monitoring of any post-OFSTED action plans

- ensure that effective arrangements are in place in each of the Academies in the Trust for pupil support and representation. A statement is required from each academy detailing how they are capturing pupil voice.
- ensure that effective arrangements are in place for monitoring pupil attendance
- ensure that effective arrangements are in place for monitoring pupil discipline and behaviour
- receive initial assessments on new governing bodies and agree any intervening action as required
- agree standards and common goals to ensure the safeguarding of children across the MAT. Academies should complete the LA safeguarding audit template from which the committee can assess compliance with local and national safeguarding requirements.
- receive annual self-evaluation reports from local governing bodies from which to assess their effectiveness
- receive termly reports from the Executive Leadership Team regarding Health and Safety standards across the MAT (this includes Trust delegated standards and national standards as set out by the Health & Safety Executive).
- develop and monitor (quarterly) the MAT's strategic risk register; reporting significant risks to the Trust Board as appropriate
- agree an approach for the monitoring of performance of new arrivals including associated reports and research.
- receive reports on academy level and trust level website compliance annually (or as new academies join the trust)
- receive reports annually on Trust-wide compliance with information governance regulations
- horizon scan and keep the responsibilities of the committee under review.

4.2.1 Membership

Di Chilvers

Muriel Eddowes

Raj Joshi

Sheila Sutherland

Emma Farmer

Becky Webb

4.3 Audit, Finance and Staffing Committee

The purpose of the Audit, Finance and Staffing Committee (AFSC) is to ensure financial probity of the Trust and strategically plan and monitor the financial growth of the MAT.

The committee will:

- develop a financial strategy for the Academy Trust and consider policies, procedures or plans required to realise such strategy
- consider the Academy Trust's indicative funding, once notified by the EFA, and assess its implications for the Academy Trust, in consultation with the CEO and the Finance Director, in advance of the financial year, drawing any matters of significance or concern to the attention of the Trustees
- scrutinise and challenge the business aspects of the Trust's strategic and annual plans and budgets with advice to the Trust Board
- receive Academies' budgets for approval
- consider and recommend acceptance/non-acceptance of the Academy Trust's budget to the Trustees
- monitor any variances from the budget and ensure the EFA is notified as required
- receive and make recommendations on the broad budget headings and areas of expenditure to be adopted each year, including the level and use of any contingency fund or balances, ensuring the compatibility of all such proposals with the development priorities set out in the Academy Trust development plan
- liaise with and receive reports from the Standards and Regulations Committee and the Business Development Committee to make recommendations to those committees about the financial aspects of matters being considered by them
- monitor and review income and expenditure on a regular basis and ensure compliance with the overall financial plan for the Academy Trust, drawing any matters of concern to the attention of the Trust Board
- monitor and review procedures for ensuring the effective implementation and operation of financial procedures, on a regular basis, including the implementation of bank account arrangements and, where appropriate to make recommendations for improvement
- prepare the financial statement to form part of the annual report of the Trustees
- ensure the Academy Trust's commercial and fundraising activities are carried out effectively
- examine and review new initiatives for financial development, including fundraising

- ensure sufficient capacity for growth
- oversee significant investment and capital financing decisions;
- consider, determine and keep under review any strategies and policies for human resources and organisational development;
- consider, determine and keep under review effective arrangements for consultation with staff as a whole and for negotiation and consultation with appropriately recognised Trade Unions and/or other representatives (e.g. annual pay negotiations);
- undertake the role of the dispute resolution panel to consider appeals against the Chief Executive Officer or Academy Trust decisions;
- ensure effective measures are in place to promote equality and diversity in employment;
- consider the details of restructuring programs following any necessary approvals in principle by the Trust Board;
- develop strategy and policy in all matters relating to the recruitment, reward, retention, motivation and development of the Academy Trust's staff, in liaison with MAT workforce (consultation);
- consider the appointment of the external auditor, the audit fee and any questions of resignation or dismissal;
- review the annual financial statements before submission to the Trust Board;
- consider all financial risks and agree a programme of risk management to ensure the trust is compliant with EFA / DfE requirements and is acting with probity and transparency
- promptly notify the Trust Board of all financial matters of which the Committee has knowledge and which may materially affect the current or future position of the Academy Trust;
- review the internal audit function, consider the major findings of internal audit investigations and the management's response, and ensure co-ordination between the internal and external auditors.
- undertake a detailed scrutiny of the Trust's:
 - performance management and reporting framework ;
 - business performance against plans and budgets;
 and advise the Trust Board accordingly;
- monitor complaints and advise the Trust Board in line with the Complaints Policy.
- undertake a detailed scrutiny of:
 - financial regulations/Standing Orders;



- all financial decisions reserved to the Trust Board
- Investment Strategy and Policy;
- Investment providers and products;
- investment performance;
- financial performance.

Co-opted Trustee & internal/external audits

and advise the Trust Board;

- review of the Trust's Reserves Policy provide advice to the Trust Board;
- approve the format of management accounts;
- approve insurance providers and level of cover;
- provide an oversight of and advice on legal/insurance issues;
- monitor and investigate of any matters of concern within its terms of reference, including seeking relevant professional advice; provide appropriate advice/reports to the Trust Board.
- escalate to the Trust Board any issues or concerns which might reasonably be expected to expose the Trust to significant reputational, business, financial, legal or other risk.
- make recommendations annually to the Trust Board re the appointment of external auditors and the setting of the scale of fees;
- approve the scope of work;
- consider the management letter and advice to the Trust Board re actions arising from and adoption of the Annual Report and Accounts.
- undertake a detailed scrutiny of:
 - the Fundraising Strategy, Policy and performance;
 - Information Systems Strategy, Policy, and performance;
 - asset management strategy and performance
 and advise the Trust Board.
- review and make recommendations to the Trust Board re:
 - Recruitment policies
 - HR Strategy and Policies including Reward and Remuneration Strategy and terms and conditions of employment.

- the staff annual pay award.
- approve the Trust's bankers;
- review and make recommendations re the Trust's main legal advisers, investment advisers and the terms of their appointment.
- Be notified of dismissal decisions by Local Governing Bodies
- Delegate representatives from the Audit, Finance and Staffing Committee to participate in disciplinary hearings / appeals where the member of staff under procedure is senior (e.g. Principal / Head of School)
- Agree internal control arrangements and methods for monitoring of such arrangements
- Agree a financial procedures manual that includes clear separation of responsibilities
- Agree a competitive tendering policy
- Agree a charging policy for the MAT
- Agree the disposal of movable assets valued £10,001 and above

4.3.1 Remuneration Sub-Committee:

The sub-committee will:

- review levels of remuneration with independent expert advice;
- oversee the appraisals of the CEO and make recommendations to the Trust Board regarding any performance pay awards;
- approve any performance pay awards for the School's SLT and Executive Leadership Team (beyond the school) on the basis of recommendations and approve new appointments to the Executive Leadership Team.

4.3.2 Membership

Antony Hughes

Judith Richardson (co-opted)

Marc Rowland

Emma Farmer

Becky Webb

5 CEO and Executive Leadership Team

The CEO and Executive Leadership Team (ELT) are responsible for supporting the Trust Board in all aspects of the operation and development of the Multi-academy Trust. They provide a link between the individual Schools and the Trust.

Strategy and Planning:

The CEO and ELT will support the Trust Board in developing/setting the Trust's overall strategy.

Governance:

The CEO and ELT will contribute to the development of the Trust's governance arrangements as well as developing and reviewing all Local Governing Bodies (LGB).

Financial Stewardship

The CEO and ELT will:

- provide management, oversight and reporting of day to day expenditure within school budgets;
- contribute to the development of the Trust's Financial Regulations/ Standing Orders for review/approval;
- manage the Trust's finances in accordance with Financial Regulations/Standing Orders.

Performance

The CEO and ELT will be responsible for:

- ensuring that the education provision in all of the schools in the Trust, is of a high standard and meets the needs of all of the pupils;
- the development and operation of the performance management and reporting frameworks and the development of the Trust's Complaints Policy for approval.

5.1 Strategy and Planning:

The CEO and ELT will:

- support the Trust Board in developing/setting the Trust's overall strategy including:
 - early consultation with the Trust Board;
 - drafting propositions for Committee/Trust Board review;

- development of strategic and operating plans and budgets for review by Committees/approval by the Trust Board.
- ensure the School Development Plans aligns with the Trust's strategy
- support the Trust's growth strategy through presenting recommendation and competing, appropriate bid processes etc.
- advise on and support the development and implementation of the Trust's:
 - Education policy;
 - communication processes, including systems for ensuring effective stakeholder engagement;
- ensure the effective management of the schools and other initiatives in line with policy/quality standards (including ensuring provision of information, advice and support on national education policy to the Local Governing Bodies);
- advise on and support the development and implementation of a Quality Assurance framework for Trust Board approval;

5.2 Governance:

The CEO and ELT will:

- contribute to development and review of the LGBs;
- plan/organise LGB meetings, prepare agendas, papers and minutes in liaison with the Chairs of the LGBs;
- contribute to the development and review of the Trust's governance arrangements, including liaison with the Trust's legal advisers;
- plan/organise Trust Board meetings, preparation of agendas, papers and minutes in liaison with the Chair.
- ensure the effective servicing and support of Trust Board Committees;
- develop a management scheme of reservation and delegation and ensure its effective implementation;
- advise the LGB Chairs in making recommendations re:
 - its membership
 - LGB Committee Chairs and membership
- support the Standards and Regulations Committee by making recommendations re Trust Board membership, its Committee Chairs and members (including Chair and Vice Chair to the LGBs).

5.3 Financial stewardship:

The CEO and ELT will:

- support the development of the Trust's Reserves Policy;
- make recommendations on selection of investment providers; monitor and report on performance;
- prepare management accounts and financial reports;
- develop the Trust's financial reporting framework for approval;
- develop systems of internal control and risk management, ensuring their effective operation; report to the Audit, Finance and Staffing Committee (AFSC) /the Trust Board, as appropriate;
- escalate to the Trust Board any issues or concerns which might reasonably be expected to expose the Trust to significant reputational, business, financial, legal or other risk;
- develop systems of internal control and risk management, relating to pupil provision, safeguarding, curriculum, teaching and learning and Health and Safety, ensuring their effective operation, and reporting to LGB/the Trust Board, as appropriate;
- select insurers/level of cover for AFSC approval;
- liaise with the Trust's insurers and legal advisers on any relevant issues and report to the AFSC/the Trust Board, as appropriate;
- support and cooperate with the work of external auditors as determined by the AFSC/Trust Board;
- prepare Annual Report and Accounts.
- respond to and act on issues raised in the external auditor's management letter;
- manage the process for the appointment of external auditors;
- plan and liaise with external auditors;
- advise on and identify requirements for fundraising initiatives in line with strategy and policy;
- develop a Fundraising Strategy and Policy for Trust Board approval and ensure its effective implementation.
- support the implementation and operation of the schools' Information Systems;
- develop an Information Systems Strategy and Policy for approval, and ensure its effective implementation; report to the LGB/AFSC, as appropriate;

- arrange the sale, purchase or disposal of capital assets <£50K and make recommendations re purchase of land/property or sale of fixed assets >£50K, in line with the provisions of the Funding Agreement;
- develop a strategy for the management of fixed assets and its implementation;
- lead on the recruitment of the school's SLT in consultation with nominated Trustees;
- report to the Chairs of LGBs on regular basis;
- lead on the recruitment of the Trust's Executive Team (beyond the school) in consultation with nominated Trustees and make recommendations re appointments for Trust Board approval;
- develop the Executive Leadership Team structure;
- develop the HR Strategy and Policies for Trust Board review and approval;
- appoint and manage all staff below SLT level in the school in line with agreed HR policy;
- set the objectives of the school's SLT and staff, manage their performance and make recommendations regarding their level of remuneration;
- set the objectives of the Executive Team (beyond the school) manage their performance and make recommendations regarding their level of remuneration
- manage all other staff in the Executive Leadership Team beyond the school in line with agreed HR policy;
- report on HR issues to a nominated Trustee on a regular basis;

5.4 Performance:

The CEO and ELT will:

- lead the development of a curriculum in all of the Trust schools which will meet the needs of all pupils;
- ensure consistency of expectations across the schools;
- ensure that the curriculum is delivered to the highest possible standard;
- develop and operate the schools' performance management and reporting frameworks for approval by the LGBs;
- develop the Trust's Complaints Policy for approval;
- implement the Trust's Complaints Policy at school level;

- support and facilitate the AFSC’s responsibilities for overseeing;
 - the performance management and reporting framework;
 - business performance against plans and budgets;
- manage and report complaints in line with the policy;
- deliver the strategy and operational management of the Trust; report on progress.

5.4.1 Membership

Rebecca Webb (CEO)

Emma Farmer (Executive Director – Business Strategy)

Helen Best (Executive Head of School)

Deborah Sanderson (Executive Head of School)

Jamie Clarke (Executive Lead for Premises and Facilities)

Alison Brigden (PA to Executive Team)

6 Local Governing Bodies

The LGB has delegated authority in relation to:

- the conduct of the School;
- promoting high standards of educational achievement in line with the overall strategic direction of the Trust;
- ensuring that the curriculum for the School is appropriate, balanced, broadly based and operates within the context of the school’s statement of values and ethos as agreed by the Trust;
- the admission arrangements to the School and related appeals;

The Local Governing Body (LGB) is responsible for:

- review and approval of:
 - LGB Sub Committees and their terms of reference;
 - the cycle of LGB meetings

- appointment of Governors beyond the Chair and vice chair and chairs and members of LGB Sub Committees (unless an Academy Intervention Board is in place)
- making appropriate arrangements for the election of parents and staff to the LGB
- approval of school policies relating to:
 - Curriculum;
 - Sex Education;
 - Religious education & collective worship;
 - Public examinations;
 - Admissions;
 - Safeguarding and promotion of pupils' health & welfare;
 - Behaviour and Discipline;
 - Health & Safety;
 - Pupil records and reports;
 - School term dates/holidays;
 - Other requirements as set out in the Trust's Articles or by regulation/legislation.

The Local Governing Body (LGB) is responsible for:

- detailed scrutiny of the School Development Plans, Post Inspection Action Plans and/or School Improvement Plans and advice to the Trust Board.
- oversight of complaints about the school in line with the Complaints Policy;
- review of school Health & Safety reports and decision on action required;
- escalating to the Trust Board any issues or concerns which might reasonably be expected to expose the Trust to significant reputational, business, financial, legal or other risk;
- detailed scrutiny of educational management information in support of pupil and school performance and providing advice and information to the Trust Board.

The Local Governing Body will:

- Inform the Trust Board of any dismissal decisions so that dismissal letters can be administered appropriately