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	Members / Trust Board / AIB/PCG/ CEO							Beacon Education					Notes
	Members	Trust Board	Finance, Audit & Risk Committee	AIB	PCG	CEO	Clerk/ Company Secretary	COO	Estates & Compliance Manager	HR	Finance Manager	Headteacher	
Growth of West Somerset Academies Trust													
Approval of new schools joining Beacon EducationMAT		FA				R							TB approves on behalf of the Trust, DfE gives final approval
Governance													
Appointment and removal of Members	FA												Members appoint and remove Members
Appointment of Trust Board Directors	FA			R		R							Members appoint Directors, Diocese appoint Diocesan Directors
Appointment of Co-opted Directors		FA											Directors appoint Co-opted Directors
Appointment of Trust Board Chair		FA											
Appointment of Committee Chairs (FAR AND AS)		FA											
Appointment of AIB Chairs and Vice Chairs		FA		R									
Appointment of AIB members		FA		R		R							
Approval of size of AIB		FA				R							
Casting vote		FA											Chair has the casting vote
Dismissal of Directors	FA												
Trust Articles of Association	R												Articles can only be amended with the approval of the ESFA
Scheme of Delegation and Terms of Reference		FA				R							
Approve Trust vision and strategy and agree key priorities		FA				R							
Trust Board expenses								DA					Chair to approve CEO expenses
Statutory Requirements													
Approval of audited financial statements		FA	R					R					
Updating Companies House							DA	R					
Appointment of Company Secretary		FA				DA							
Appointment of auditors	FA							R					
Trust website management and updating								DA					Central team maintain Beacon EducationMAT website; schools to update their own sites.

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Approving Trust wide statutory policies - Part 1		FA	R			R							Approval in alignment with Policy Review Schedule
Approving local school procedures - Parts 2 and 3				R		FA							Approval in alignment with Policy Review Schedule

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Budget Setting and Budget Control													
Approving Annual Budget and consolidated Trust Budgets		FA	R			R		R				R	
Monthly Management Accounts and Cashflow Forecast								DA			R	R	COO responsible for the management accounts which are presented to CEO/Trust Board
Monthly Balance Sheet								DA			R		COO responsible for the balance sheet which is presented to CEO/Trust Board
VAT Returns								DA			R		
Statutory Financial Returns (BFRO and AAR)			R			FA		R					
Approving grants to academies from reserves													
Release of 1% reserves													Not currently being applied
Authorising orders and contracts for goods and services													
Up to £5000											FA	DA	Headteacher PSF threshold set as £500 to ensure visibility for Finance Manager, however Headteachers can approve up to £5000 spend. At least one quote is to be obtained
Up to £20,000								FA			DA		School spend over £500 and Trust Spend up to £20000. Between £5000 and £25000 3 quotes are obtained. If not possible COO can authorise but it should be minuted at FAR.
£20,000 - £50,000						FA		DA			R		For values over £25000 3 quotes are obtained and minuted at FAR. CEO approval is documented within PSF
£50,001 - £100,000						FA							
Greater than £100,000			FA										
Policy and management use of business credit cards						DA		R			R		
Bank Accounts													
Making changes to the bank mandate						FA		DA					Two Signatories are required out of Chair/CEO and COO

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Making payments from bank accounts								FA			DA		Payments made by FM with dual approval from COO
Making decisions on investing any reserves			FA			R		R			R		
Other Finance													
Approving the disposal of fixed assets								DA					See financial handbook for approval limits.
Approving the write-off of bad debts up to £1000								DA			R		COO has approval up to £1000 relating to a single debtor.
Approving the write-off of bad debts over £1001			FA										Write off of debts £1000+ requires FAR approval, to be minuted
Purchase/ Sale of freehold property		FA						R	R				See financial handbook for approval limits
Taking up leases		FA				FA		R	R				See financial handbook for approval limits
Premises													
Structural alterations within the existing building								FA	R			R	
Use of buildings for hire or reward								R	R			FA	
Submission of property insurance claims								FA	R			R	
Siting of external temporary buildings/containers/outbuildings								FA	R			R	
Alterations to perimeter fencing/external signage								FA	R			R	
Approval of Business / Continuity plan		FA				R		R	R			R	
Alterations to fire and/or security protection systems/contracts								FA	DA			R	
School Improvement													
Appointment of External Advisor/Consultant						DA						R	
Staffing Structures													
Approval of changes to structures - Beacon Education/MAT Central Trust Team			R			DA		R		R			
Approval of changes to structures - Academy Leadership				R		FA		R		R		R	
Approval of changes to support staff structures in academies				R		FA		R		R		R	

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Approval of changes to teaching staff structures in academies				R		FA		R		R		R	
HR Policies													
Pay Policy/Changes to Beacon Education MAT terms and conditions		FA	R			R		R		R			
All other policies (employment related)						R		R		R			
Approval of appointments													
CEO		FA	R							R			Diocese representative to be included within interview panel as per Articles of Association
Central Trust staff						DA		R		R			
Headteachers			R			DA				R			Diocese representative to be included within interview panel as per Articles of Association
Deputy Headteacher				R		DA				R		R	
Assistant Headteacher				R		DA				R		R	
Staff in academies						DA		R		R		R	

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Approving Monthly Payroll and Staff Expenses													
Payroll								DA		R			Line Managers approve overtime
CEO expenses		FA											Chair to approve CEO expenses
Staff expenses						DA		DA		R		DA	Line Managers/Headteachers approve expenses
Approving staff severance, compensation, ex gratia payments						DA		R		R		R	See financial handbook for approval limits
Annual Appraisal													
CEO		FA											Chair of Trust Board and Chair of Achievement and Standards
Headteachers				R		DA							Chair of AIB
Director of Business Leadership/COO			R			DA							Chair of Finance, Audit and Risk
Central Trust staff						DA		DA	DA	DA			Undertaken by relevant Line Manager
Staff in academies												DA	
Employee Pay and Reward													
Recommendations to award pay increments linked to appraisals for CEO		FA											
Recommendations to award pay increments linked to appraisals for Headteachers						FA							
Recommendations to award pay increments linked to appraisals for all other staff						FA		R		R		R	CEO to give FA, informed by recommendations
Organisational Change and Redundancies													
Approval of business case			FA			R		R					
Recommendations to dismiss on redundancy grounds		FA				R		R		R		R	
Dismissals on redundancy grounds						FA		R		R		R	
Appeals against redundancy dismissals		FA				R	R			R			

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Dismissals													
CEO		FA								R			Members dismiss. Trustee appointment
COO		FA				R							Members dismiss. Trustee appointment
Headteachers/Educational Director		FA				R				R			
Central Trust staff						DA		R		R			
Staff in academies						DA				R		R	
Appeals		FA				R	R			R			
CPD													
CPD Plan						DA		R				R	
Safeguarding													
Overarching Safeguarding Statement of Intent			FA			R							
Appointment of Designated Safeguarding Director		FA				R							
Appointment of Designated AIB members		FA		R		R							
Approval of Trust Safeguarding Strategy		FA	R			R							
Approval of School Safeguarding MIP			FA			R						R	
Management & Accountability: local safeguarding						R							FA
Appointment of DSL and Deputy													FA
Audit arrangements			FA										R
Measuring and Reviewing Performance			FA										R
Academy based activities													
Making significant variations to the assessment structure				R		R							R
Variations to curric offer, changes that could impact on children's wellbeing		R				FA							R
Approve annual school targets						FA							R

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Operational Health and Safety Matters								FA	R			R	

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Emergency School Closure						DA			R			R	When not practicable to communicate Headteacher can close school
Approve School Improvement Plan (SIP)				FA		R						R	
Monitor the effective delivery of the School SIP				FA		R						R	
Monitor staff and wider school community wellbeing and general community cohesion		FA		R	R	R						R	
Risk Management		FA	R	R		R		R	R			R	
Making variations to the length/structure of the academy day		FA		R		R						R	
Make changes to Admissions Policy, inc PAN changes		FA						R				R	
Permanently exclude a student						FA						R	
Complaints - Informal												DA	See complaints procedure
Complaints - Formal						DA	R						See complaints procedure
Complaints - Appeals		FA					R						See complaints procedure
Make changes to the academy uniform for students				R		FA		R				R	
Information Technology													
Approve IT Strategy			FA			R		R	R		R	R	R = Trust IT Manager
Management of IT budget								DA	R		R		R = Trust IT Manager
Approving changes to Data Protection Policy/GDPR			FA					R	R				R = Trust IT Manager
Appoint Trust Data Protection Officer						FA		DA			R		COO is Data Protection Lead. We employ a DPO via SCC R = Trust IT Manager
Learning Provision (including SEND)													
SEND Plan and Strategy				FA								R	
Pupil Premium Plan review and spend				FA		R						R	
Sports Premium				FA		R						R	
COVID Catch Up Funding				FA		R						R	
National Tutoring Programme				FA		R						R	