



OWLS Academy Trust

MAT trustees' work schedule

This template has been designed to allow trustees to track their duties and responsibilities over the course of an academic year. It has been arranged in chronological order, dividing each term into two sections, which correspond to six half-terms.

There is a column which indicates whether a duty or responsibility is a statutory requirement or is considered good practice. There is a column which indicates the deadline for completing the task, and another which indicates whether the deadline was met. The final column allows trustees to indicate whether any further action is required.

Duty	Statutory/good practice	Relevant body	Deadline	Deadline met	Further action
Autumn term 1					
All trustees read and sign the trustees' code of conduct, which outlines the types of behaviour expected of trustees.	Statutory	[Full board of trustees/finance committee/safeguarding committee]	[20/12/2016]	[Y]	[No further action is required]
Trustees maintain the code of conduct throughout the academic year, making amendments where required.	Statutory				
All trustees complete and submit a Register of Business/Pecuniary Interests Form , which allows the school to publish the information on their website.	Statutory				
A Scheme of Delegation is agreed upon and published on the school's official website.	Statutory				

A plan is established for allocating pupil premium funds, with the final plan being published on the school's website.	Statutory				
The school's official website is audited to ensure that the school is meeting all of its statutory requirements, in terms of the information which they must publish.	Statutory				
The board creates guidelines which ensure that the trust's funds are not misused.	Statutory				
All the trustees read and understand the Charity Commission's guidance for trustees.	Statutory				
All the trustees read and understand their statutory duties and responsibilities, as outlined by Companies House.	Statutory				
The board appoints a senior executive leader.	Statutory				
The board decides on the total number of meetings for the academic year, with a minimum of three in an academic year.	Statutory				
The board establishes a clear scheme of delegation.	Statutory				

The board publishes details of their governance structure on the school's official website.	Statutory				
The board establishes a system for declaring, managing and monitoring connected party relationships.	Statutory				
The board appoints an independent auditor to review the trusts, including the procedures for notifying the EFA if they remove an auditor.	Statutory				
The membership of the board of trustees is agreed.	Good practice				
The dates and times of all the board meetings are scheduled for the academic year.	Good practice				
Chairmen and clerks are elected to all the committees and sub-committees.	Good practice				
The board have conducted a skills audit on their skills and experience, and have made suggestions for improvement.	Good practice				
A report is submitted which details staff performance during the previous academic year.	Good practice				

A report is submitted which details the current financial status of the trust.	Good practice				
A review is conducted of the allocation of resources, with particular focus on pupils: <ul style="list-style-type: none"> • With special educational needs and disabilities (SEND). • Who are eligible for pupil premium. • Who have been assessed as being academically more able. 	Good practice				
A review is conducted to assess the effectiveness of the School Improvement Plan	Good practice				
A review is conducted to assess the standard of teacher support and development.	Good practice				
A review is conducted to assess whether the board is currently meeting the requirements and aims of the overall vision and ethos of the school.	Good practice				
Autumn term 2					

The Data Protection Policy is reviewed and recommendations are made for improvement.	Statutory				
The Health and Safety Policy is reviewed and recommendations are made for improvement.	Statutory				
The Admissions Policy is reviewed and recommendations are made for improvement.	Statutory				
The Accessibility Plan is reviewed and recommendations are made for improvement.	Statutory				
The Register of Attendance is reviewed and recommendations are made for improvement.	Statutory				
The Register of Admissions is reviewed and recommendations are made for improvement.	Statutory				
All existing home-school agreements are reviewed and recommendations are made for improvement.	Statutory				
A budget is planned for the next three academic years.	Good practice				
A review of pupil numbers is conducted.	Good practice				

A review of staff performance management is conducted, and recommendations are made for improvement.	Good practice				
A review of disciplinary and grievance procedures is conducted, and recommendations are made for improvement.	Good practice				
A review of parental engagement and communication is conducted, and recommendations are made for improvement.	Good practice				
A training budget is established for staff.	Good practice				
Training opportunities for staff and trustees are scheduled for the academic year.	Good practice				
The salary points of teaching staff are confirmed.	Good practice				
A list of honoraria payments to staff is completed.	Good practice				
A plan is implemented to monitor pupil performance, which includes setting targets.	Good practice				

Spring term 1

<p>The Complaints Procedures Policy is reviewed and recommendations are made for improvement.</p>	<p style="text-align: center;">Statutory</p>				
<p>The Premises Management Policy is reviewed and recommendations are made for improvement.</p>	<p style="text-align: center;">Statutory</p>				
<p>The Teachers' Appraisal and Capability Policy is reviewed and recommendations are made for improvement.</p>	<p style="text-align: center;">Good practice</p>				
<p>The Teachers' Pay Policy is reviewed and recommendations are made for improvement.</p>	<p style="text-align: center;">Good practice</p>				
<p>Recruitment plans are made for the next academic year.</p>	<p style="text-align: center;">Good practice</p>				
<p>All the existing risks assessments are reviewed, and recommendations are made for new risk assessments.</p>	<p style="text-align: center;">Good practice</p>				
<p>A review of the condition of the buildings and premises is conducted, and recommendations are made for improvement.</p>	<p style="text-align: center;">Good practice</p>				

A review of teaching standards is conducted, and recommendations are made for improvement.	Good practice				
A mid-year budget review is conducted.	Good practice				
A review of pupil achievement data is conducted.	Good practice				
A review of support staff pay is conducted, and recommendations are made for improvement.	Good practice				
Spring term 2					
The Single Central Record is reviewed and updated.	Statutory				
The Sex and Relationship Education Policy is reviewed and recommendations are made for improvement.	Statutory				
The Equality and Diversity Policy is reviewed and recommendations are made for improvement.	Statutory				
The Allegations of Abuse Against Staff Policy is reviewed and recommendations are made for improvement.	Statutory				

The SEND Policy is reviewed and recommendations are made for improvement.	Statutory				
The Asset Control Policy is reviewed and recommendations are made for improvement.	Good practice				
A review of the current staff appraisal process is conducted, and recommendations are made for improvement.	Good practice				
A review of school uniform affordability is conducted, and recommendations are made for improvement.	Good practice				
Summer term 1					
The Charging and Remissions Policy is reviewed and recommendations are made for improvement.	Statutory				
The Pupil Behavioural Policy is reviewed and recommendations are made for improvement.	Statutory				
The Freedom of Information Policy is reviewed and recommendations are made for improvement.	Statutory				

The Supporting Pupils with Medical Conditions Policy is reviewed and recommendations are made for improvement.	Statutory				
The Trustees' Payment Policy is reviewed and recommendations are made for improvement.	Good practice				
A review of staff pay is conducted and recommendations are made for the next academic year.	Good practice				
A draft annual budget for the next academic year is submitted to the full board of trustees.	Good practice				
The induction process for new members of staff is reviewed, and recommendations are made for improvement.	Good practice				
A review of SEND provision is conducted, and recommendations are made for improvement.	Good practice				
A review of the allocation of pupil premium funding is conducted, and recommendations are made for improvement.	Good practice				

Questionnaires are sent to parents/carers, in order to ascertain their levels of satisfaction with the school's performance.	Good practice				
Summer term 2					
The Staff Complaints and Grievance Policy is reviewed and recommendations are made for improvement.	Statutory				
The Child Protection and Safeguarding Policy is reviewed and recommendations are made for improvement.	Statutory				
The Early Years and Foundation Stage Policy is reviewed and recommendations are made for improvement.	Statutory				
The budget for the next academic year is approved by the full board of trustees.	Statutory				
The board establishes a plan for reporting budget deficits to the EFA.	Statutory				

The board of trustees publishes its annual accounts, which includes details of the trust's governance arrangements.	Statutory				
The board establishes procedures to ensure: <ul style="list-style-type: none"> • Good management and effective financial controls. • Compliance with their funding agreement. • Rigour and scrutiny in examining the budget. • Effective meetings are in place to examine the budget. 	Statutory				
The designated teacher for looked after pupils submits an annual report to the board, as well to guardians of looked after pupils.	Statutory				
The headteacher 's annual report is reviewed.	Good practice				
The headteacher 's annual report to parents/carers is created and sent to all parents/carers of pupils at the school.	Good practice				
The Staff Capability Policy is reviewed and recommendations are made for improvement	Good practice				

A review of the school's existing service level agreements is conducted, and recommendations are made for improving value for money.	Good practice				
Staff salaries for the next academic year are approved.	Good practice				
Training for trustees is arranged for the next academic year.	Good practice				
The data from parent/carer questionnaires is analysed and recommendations are made for the next academic year.	Good practice				
Arrangements are made for the trustees' visits during the next academic year.	Good practice				