



Athena Learning Trust

Athena-wide

Policies Policy

Review

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This policy applies to Athena Learning Trust as a whole and to all the schools and the shared service.

This policy sets out the policy framework adopted by the board of trustees of the Athena Learning Trust and the procedures for approval and review of trust-wide and school-specific policies.

It is the responsibility of the governing body and head teacher or principal of each school, and the board of trustees and/or their committees, and the CEO to ensure that their school/service and its staff follow this policy. In implementing this policy each governing body, head teacher or principal, all trustees and shared service staff must take account of any advice given to them by the CEO and/or board of trustees.

This policy is subject to the Athena Learning Trust Scheme of Delegation for governance functions. If there is any ambiguity or conflict, then the Scheme of Delegation takes precedence.

If there is any question or doubt about the interpretation or implementation of this policy, the CEO should be consulted.

The responsible officer for this policy is the CEO.



1.1 Introduction

Athena Learning Trust is a charitable company limited by guarantee, constituted under a Memorandum of Association and Articles of Association. The board of trustees is the governing body of Athena Learning Trust as a whole, and is responsible for its operation and performance as a whole.

The board of trustees has to ensure that Athena Learning Trust as a whole and all the schools and the shared service operate in accordance with the trust's Articles of Association and its funding agreements, and with all relevant legislation and guidance.

To enable it to fulfil this responsibility, the board of trustees approves a range of policies and procedures that set out what its schools, the shared service, staff, governors and trustees need to do, and what policies and procedures they are required to have and to follow.

It is the responsibility of the governing body and the head teacher or principal of each school, and the board of trustees and the CEO to adopt, maintain and implement policies and procedures for their school / the shared service, and to ensure that any such school/trust-wide policies and procedures are consistent with the Articles of Association and Funding Agreements and the policies and procedures of the trust.

In implementing such policies and procedures the governing body, head teacher or principal and school and shared service staff must take account of any advice given to them by the CEO or board of trustees.

1.2 Terminology:

- School means a school within Athena Learning Trust.
- Principal means the principal or head teacher of the school.
- CEO means the Chief Executive Officer of Athena Learning Trust.
- Shared service means the services, functions and staff of the Athena Learning Trust that are not contained within a school budget and/or are not the responsibility of a school principal and/or governing body.
- Governing body means the committee of the board of trustees to which trustees have delegated appropriate powers and functions related to the governance of a school or group of schools.

References in this policy to a school should also be read as the shared service for services, functions

and staff that are not contained within a school budget and/or are not the responsibility of a school principal and/or governing body. With respect to the shared service, references in this policy to the responsibilities of the principal and governing body should be read as the CEO and the board of trustees respectively.

References in this policy to ‘policies and procedures’ should be read as including ‘reports, statements and schedules etc’.

2.1 Policy framework

General descriptions of the requirements for ‘policies’ often use the terms ‘policy’ and ‘procedure’ interchangeably. Athena Learning Trust has adopted a standard ‘default’ structure for its policies and procedures as follows:

- **Policy** – statement of principles, aims and objectives, the requirements that the board places on Athena Learning Trust and its schools, or that a governing body places on its community; non-negotiables; decision of ‘governors’ (board of trustees or local governing body).
- **Procedure** – what schools, the shared service, staff, trustees and governors, and a school’s staff, students, parents etc, have to do to meet the requirements of the policy and how the policy is implemented; what to do and who does it.
- * **Guidance** – more detailed and specific advice and guidance on how to implement the policy and procedure for those having to do it – primarily shared service and school staff.

In order to ensure that Athena Learning Trust fulfils its statutory responsibilities all schools and the shared service must follow Athena Learning Trust policies, procedures and guidance and must develop, maintain and implement their own policies, procedures and guidance where required by and consistent with those any Athena policies and procedures.

Trust-wide policies are statements approved by the board of trustees on behalf of Athena Learning Trust as a whole; setting out the trust’s position and intent to stakeholders, and placing requirements on schools and staff, and on governors/trustees and anyone visiting an Athena Learning Trust establishment. Procedures are statements of how Athena Learning Trust and its schools, staff and governors/trustees will implement those policies. Athena Learning Trust policies and procedures are approved by the board of trustees.

School-specific policies are statements by the school to its stakeholders setting out how it will operate and the requirements it places on its staff, students and parents, governors and anyone visiting the school. School-specific procedures are statements of how the school and its staff and governing body will implement those policies.

School-specific policies and procedures must be consistent with relevant Athena Learning Trust policies and procedures. Where a school-specific policy or procedure is not consistent with the relevant Athena Learning Trust policies and procedures, or is silent, or if there is any doubt, the Athena Learning Trust policy or procedure will apply.

Guidance may be issued to provide additional details to those persons required to implement a policy or procedure to assist them and ensure the policy/procedure is implemented appropriately.

Guidance related to Athena Learning Trust policies and procedures, and to school-specific policies and procedures, will be issued by the appropriate person; CEO, director of education, head teacher or principal.

Athena Learning Trust has grouped its policies and procedures under the classes of policy below.

Each local governing body and the board of trustees must ensure that its school(s) / the shared service operate in accordance with Athena Learning Trust policies and procedures, and must adopt and maintain policies and procedures as required by and in accordance with this policy.

3.1 Trust-wide policies and procedures

The board of trustees has approved a set of trust-wide policies and procedures. A trust-wide policy/procedure is a single policy/procedure that must be followed by all schools and the shared service.

Where the board of trustees has approved a trust-wide policy/procedure, any pre-existing policy/procedure that is covered by the trust-wide policy/procedure will fall; and where any school policy/procedure is superseded by or contradicted by a trust-wide policy/procedure the trust-wide policy/procedure will override; and the trust-wide policy/procedure will apply to the school.

Some trust-wide policies/procedures may have a school-specific element or annex; in these cases each school's head teacher or principal will need to tailor, and their local governing body approve, those specific parts of the policy/procedure – and those parts only, as indicated in the

policy/procedure – to their specific requirements.

It is the responsibility of the head teacher or principal and local governing bodies with respect to schools, and of the CEO and board of trustees with respect to the shared service, to ensure that their schools and services are managed in accordance with any Athena Learning Trust policies, and they must adopt and maintain school and shared service policies and procedures as required.

New schools joining Athena Learning Trust will automatically adopt all trust-wide policies immediately on conversion. However all schools will begin the movement to Athena Learning Trust policies at least 3 months prior to the point of conversion to ensure there is a thorough understanding of the policies and procedures.

3.2 School-specific policies and procedures

For any school-specific policies and procedures, the board of trustees will approve a model document available across all schools, and this may contain specific sections within it that schools will need to add in or tailor to their local circumstances.

The model policies and procedures contain a structure and example and suggested text that has been pre-approved, and provides guidance and represents 'good practice'. Head teachers, principals and local governing bodies should consider adopting or adapting the model, or at least have regard to it, when reviewing or creating their own policies and procedures.

School-specific policies and procedures are statements by the school to its local stakeholders, where the board of trustees has determined that all schools may follow the same policies/procedures, so that Athena Learning Trust can fulfill its statutory responsibilities and/or manage its schools effectively.

Where a template exists, that template must be used to create the appropriate school policy / procedure, and must be completed with accurate and appropriate details for the school.

For these policies/procedures, the local governing body must approve any school-specific variations (with the exception of any 'surface changes', for example, the name of a responsible member of staff), but may not alter the base policy/procedure.

New schools joining Athena Learning Trust will automatically begin to use the school policy and procedure templates and agree with the CEO and Head of Governance a timeline for review of any

existing policies.

The head teacher or principal may adopt other policies or procedures as they deem necessary to their responsibilities for running their school; in doing so, they must ensure that any such school procedures are consistent with other Athena Learning Trust policies, and must take advice as necessary. Any policies or procedures not included within trust-wide or school-specific model policies must be approved by the school's local governing body.

3.3 Operational procedures

In order to implement the policies and procedures of Athena Learning Trust and of the local governing body and day-to-day running of their school, the head teacher or principal may adopt and implement further operational procedures as long as they are consistent with any other appropriate Athena Learning Trust or their own school-specific policies. Any such procedures are deemed to be operational matters within the delegated authority of the head teacher or principal.

The head teacher or principal may, if they deem it necessary or beneficial to their responsibilities for running their school, choose to consult a link governor and/or their chair and/or the local governing body as a whole on the procedure; but the procedure does not need to be, and should not be, presented to the local governing body for approval.

New schools joining Athena Learning Trust will automatically follow the process for operational procedures on conversion.

4. Shared Service policies and procedures

In a similar way to schools having their own policies and procedures, the shared service will need to develop, and the board of trustees, or a committee to the board, will need to approve appropriate policies and procedures.

It is the responsibility of the board of trustees and the CEO to ensure that any shared service policies and procedures are consistent with any trust-wide policies.

5.1 Approval

All policies and procedures will identify an 'owner' who is responsible for the maintenance and review of the policy/procedure. Where the responsible officer is identified as the head teacher or principal or CEO, they may delegate that function to an appropriately senior and qualified member of their staff.

Policies and procedures should be drafted by the identified responsible person. Appropriate legislation and DfE guidance should be followed, and any appropriate persons should be consulted before the final draft is produced. The draft policy/procedure should then be presented to the board of trustees or a committee of the board for approval.

Where one exists, the approved model/template should be used or taken account of. If significant changes are made, appropriate legislation and DfE guidance should be followed; advice should be sought from the appropriate officers of the shared service; and any appropriate link governor may be consulted before the final draft is produced. The draft policy/procedure should then be presented to the local governing body for approval.

5.2 Formal review

Policies and procedures must be reviewed by the responsible person in a similar way to the process described in section 5.1, and presented to the approving body for approval, at the latest before the formal review date.

The recommendation to the approving body should summarise/demonstrate any changes that have been made to the policy/procedure since it was last formally approved. Significant changes to the effect or operation of the policy/procedure should be identified and significantly changed sections in the policy/procedure should be referenced; where appropriate and it adds clarity, new and changed text in the policy should be indicated e.g. by different coloured text.

If any amendments are only minor/technical drafting changes, the approving body should be informed of the proposed changes and the nature of the proposed changes should be made clear in the recommendation.

If the policy/procedure does not require any changes, the approving body should be informed of this; the recommendation to the approving body should state that the content of the policy has not changed since it was last approved.

If the policy/procedure has only been subject to minor/technical drafting changes, this should be stated in the recommendation to the approving body.

5.3 Interim review and minor / technical changes

The person named as the owner for the policy or procedure is responsible for ensuring that the policy/procedure is kept up-to-date between formal reviews.

If minor/technical drafting changes are required to a policy/procedure that do not materially affect the nature of the policy/procedure, such changes can be made by the responsible officer without the policy/procedure being presented for approval to the approving body; for example a change to the name or contact details of a member of staff referred to, or technical updates required by legislation or guidance that do not materially alter the effect or operation of the policy/procedure.

If the required change is more significant and cannot be classed as a minor/technical drafting change, then the proposed revised policy/procedure must be presented to the next available meeting of the approving body for approval.

If the change is deemed to be more significant, but is required urgently and cannot wait until the next meeting, the responsible officer may propose, via the clerk to the local governing body/head of governance and compliance, that the revised policy/procedure be approved by written resolution of the chair.

If the responsible officer is unsure whether the amendments required fall within their delegated authority, they should consult the head teacher or principal for a school-specific policy/procedure, or the CEO for a trust-wide policy/procedure; if the head teacher or principal is unsure, they should consult the head of governance and compliance.

If the required changes are deemed to be minor/technical drafting changes, the owner should provide a proposed amended policy/procedure with an explanation of the changes being proposed. If the chair of the approving body believes that the proposed changes would materially alter the effect or operation of the policy/procedure and should therefore be considered by the approving body, they should refer the matter back for it to be dealt with in accordance with section 5.2

The updated policy/procedure will be identified by a 'version number' and date being entered on the front page of the policy/procedure; the title of the policy/procedure and the formal approval date should remain as the date it was last formally approved by the approving body. Operational procedures may not require a review date, in line with legislation and DfE guidance.

6.1 Recording and publication

Whenever a policy or procedure has been approved or formally reviewed, or by written resolution of the chair if urgent, or has been amended by the owner if minor/technical drafting changes only, the policy/procedure should be provided to the head of governance. The head of governance will update internal tracking systems as necessary.

For shared service or trust-wide policies, the head of governance must ensure that the latest approved and checked versions of any policies/procedures are made available to appropriate staff and that they are published on the Athena Learning Trust website.

For school-specific policies, the head teacher or principal must ensure that the latest approved and checked versions of trust-wide and school-specific policies/procedures are made available to appropriate staff, and that school policies/procedures are published on the school website.

In addition, the head teacher or principal may choose to issue an appropriate operational school procedure to staff and/or parents and/or to publish it on the school website.

6.2 Structure and style of policies and procedures

The structure and layout, and style and wording, of any policies and procedures should follow the master policy template.

Trust-wide and shared service policies, procedures and guidance should have Athena Learning Trust branding only.

School policies, procedures and guidance, should have the appropriate school branding.