

APPENDIX TWO: BDAT LEVELS OF DELEGATION CHECKLIST SEPTEMBER 2026

This document outlines the specific powers that the Bradford Diocesan Academies Trust (BDAT) delegates to Academy Local Governing Bodies (LGBs) and designated individuals. These delegations are part of BDAT's overarching Scheme of Delegation, which ensures that governance and decision-making responsibilities are clearly defined and appropriately distributed across the Trust.

In addition to the powers formally delegated by BDAT, the following entities within the Trust structure may choose to delegate further responsibilities as needed:

- Chief Executive Officer (CEO)
- Local Governing Body (LGB)
- Board Committees
- Headteacher / Executive Headteacher

This flexibility allows for operational efficiency and responsiveness to the specific needs of individual academies. However, it is important to note that any delegation of authority does not absolve the Trust Board of its ultimate accountability. The Trust Board retains legal and strategic responsibility for all decisions made under delegated authority and reserves the right to revoke (de-delegate) any powers if necessary.

This Scheme of Delegation should be read in conjunction with relevant Trust policies that detail the operational procedures and expectations associated with delegated powers. These policies provide essential context and guidance for decision-making at all levels.

The Scheme of Delegation is subject to annual review and renewal to ensure it remains fit for purpose and reflects any changes in governance, legislation, or Trust priorities.

The Scheme of Delegation also sits alongside the Trust's Terms and Conditions of Joining, which outline the expectations, commitments, and governance arrangements agreed upon when an academy becomes part of BDAT.

Here are some key definitions of the terms used as abbreviations to indicate the roles of various groups in the operation of the scheme of delegation

Approve	They sign off or approve the task, objective or decision.
Do	These are the people who carry out the task or objective, and they propose decisions for approval.
Control	They review / quality assure the outcome of the delegated task and can step in to overturn it if needed.
Suggest	They provide support and expert advice to the people accountable for or completing the task
Inform	They're kept updated on the outcome of the delegated task

	Delegated Duty	Approve	Do	Control	Suggest	Inform	Comments
1.1 Strategy and Vision							
1.1	To set the strategic direction and vision for the Trust.	Board	CEO		Exec	All	
1.2	To set the strategic direction and vision for the Academy	LGB	Head		SLT		
2. Central Services							
2.1	To determine the scope of mandatory core central services to be delivered by the Company on behalf of its Academies including the level of centrally retained funding	Board	CEO		Exec	All	These are set by the Board as per the "Terms of joining document" provided to all schools when considering joining the Trust and will be reviewed annually at every Summer Trust Board meeting alongside this Scheme of Delegation.
2.2	To identify those additional services to be procured on behalf of individual academies.	LGB	Head				Additional Services will be reviewed on a regular basis. Must be in line with the finance policy.
3. Finance							
3.1	To set the overall and central MAT budget	Board	CEO/ CFO	FARC			
3.3	To set the school budget including: Determining Staffing	Board	Head/ ABL	FARC	LGB		Academy budget planning and spend is delegated to individual academies for all funding minus the retained central funds.
3.3	To monitor monthly expenditure - Trust	Board	CFO				Monitored by CEO, COTB and FARC as part of Management Accounts Monthly
3.4	To monitor monthly expenditure - School	Head	ABL				
3.5	Budget changes or in-year budget movements	FARC	CFO				
3.6	Budget changes or in-year budget movements between spend headings within the Academy budget (up to £10k per month)	LGB	Head				

	Delegated Duty	Approve	Do	Control	Suggest	Inform	Comments
3.7	In-year budget movements between spend headings within the Academy budget which are likely to result in a budget overspend.	FARC	Head	CFO	LGB		LGB to discuss change with CFO and propose changes. FARC to authorise overspend.
3.8	To establish financial decision levels and limits.	Board	CFO			Head / LGB	As advised by the CFO.
3.9	To establish a charging and remissions policy -Trust	Board	CFO				
3.10	To establish a charging and remissions policy - School	LGB	ABL/HT				
4. Investments							
4.1	Set the investment policy	Board	CFO	FARC			
4.2	Allocate monthly investments	CEO / CFARC	CFO				
5. Staff Management – Selection and Appointment For guidance on Staff Complaints and Grievances, Appraisal, Capability and Disciplinary matters, please see the relevant policy. https://www.bdat-academies.org/bdat-business/bdat-policies/							
5.1	Chief Executive Officer	Board	Board		Diocese	Board	Appointment by Board, Performance Management by COTB, and another nominated Trustee.
5.2	Central Executive Team.	Board	CEO		Exec	Board	CEO and a nominated Trustee (s)
5.3	Central Trust Staff	Exec	Exec			CEO	Line Manager, (may inc CEO)
5.4	Executive Principal, Principal and Head of School	Board	LGB DOE CEO Trustees		Diocese Exec		For all Head appointments the panel will normally involve two Trustees (may inc. CEO), Chair of Governors (or their delegated rep) a Diocesan Advisor (for Church Schools) and either the Education Director or Executive Principal in an advisory Capacity. The Board makes the final appointment.
5.5	Agreement to release and appoint an interim Headteacher / Principal	CEO	CEO DOE	LGB HT	Diocese	Board	CEO, Education Director, Chair of Governors. (Diocesan Advisor informed)
5.6	Deputy, Vice and Assistant Principal	LGB	Head		DOE	CEO	Head, Chair of Governors or Governor
5.7	Wider staff recruitment	LGB	Head	Exec			
6. Pay							
6.1	Agree an annual Trust pay policy and pay awards proposed by National Unions and the Department for Education.	Board	CFO	FARC			Trust to agree overall policy and pay rewards.

	Delegated Duty	Approve	Do	Control	Suggest	Inform	Comments
6.2	Pay awards for all Headteacher / Exec Headteacher	Board	CFO	FARC	LGB		FARC Remuneration committee to recommend to the Trust Board based on growth within the pay range and member of staff not in a capability process.
6.3	Pay awards for other Staff.	LGB	Head /ABL	CFO			Headteacher to agree with LGB within agreed budget and pay award envelope
6.4	Pay awards for Central Trust staff	Board	CFO	FARC			FARC Remuneration committee to recommend to the Trust Board based on growth within the pay range and member of staff not in a capability process.
7. School Organisation							
7.1	Significant change which may impact the number, type and or location of school places.	Board	Exec / Head	FARC DCA	LGB		BDAT Board must approve business case and where necessary DBE, LA approval may need to be sought. i.e. permanent enlargement of an academy's buildings, and age range changes. Director of Corporate Affairs (DCA) can advise The LGB can propose changes to the Board and must implement all required consultations.
7.2	New Schools joining the Trust	Board	Exec	CEO	Exec		Due diligence proposed to Board by CEO.
7.3	To set the times of school sessions and the dates of school terms and holidays.	LGB	Head	DOE			Any changes must be agreed in writing with the Trust following consultation with the Education Director.
7.4	To ensure that the school meets for 380 sessions in a school year.	LGB	Head	DOE			
7.5	To decide the unexpected and unplanned school closures e.g. for snow or critical equipment breakdowns.	Head	Head	DOE CEO	DOE	LGB Chair	Prior to any closure or delayed start, discuss with the CEO, Education Director or Head of Estates. Once the decision has been agreed this must be communicated to the Chair of Governors and the CEO (or a member of the MAT executive) in an email and by text, Schools should also notify the LA using the usual BSO process.
8. Curriculum and Standards							
8.1	Accountability for individual child's education	LGB	Head	DOE			
8.2	Accountability for school performance and standards	LGB	Head	DOE			Where a schools standards are low or slipping, or predicted to be at risk of slipping, the DOE may direct the HT/School SLT to work with them to co-construct a bespoke (costed)

	Delegated Duty	Approve	Do	Control	Suggest	Inform	Comments
							improvement plan to address the area of concern. This plan will then be reported on to the LGB, CEO and Trust Board.
8.3	Provision of RSHE– to establish and keep up to date a written policy.	LGB	Head	DOE			
9. Religious Education and Collective Worship							
9.1	To ensure provision of RE in line with the locally agreed syllabus and the national curriculum requirements for Non-church schools.	LGB	Head	Exec			All BDAT Church schools are following the Diocese of Leeds and York RE syllabus. Non-Church schools will follow the locally agreed syllabus.
9.2	To ensure that all Church Schools deliver the minimum requirements within the Church of England Statement of Entitlement for RE.	LGB	Head	Exec			Parents have the right to withdraw their children from RE if notified to the Academy in writing. The Headteacher must make appropriate provision if a parent exercise this right. The Trust Board must also ensure each Church Academy meet the requirement of the Church of England Statement of Entitlement for RE as set out in the Academy Church Supplemental Funding agreement.
9.3	To ensure that all pupils take part in a daily act of collective worship (all schools). See collective-worship-guidance-18052021.pdf (churchofengland.org)	LGB	Head	Exec			Parents have the right to withdraw their children from collective worship if notified to the Academy in writing. The Headteacher must make appropriate provision if a parent exercise this right. The Trust Board also have a responsibility to ensure each church academy, follows the requirement of the Church of England Guidance for Collective Worship as set out in the Academy Church Supplemental Funding Agreement.
10. Alternative Provision							
10.1	New alternative provision	Board	Head	CEO	Exec		
10.2	To ensure best interests of the pupils that any alternative provision is used in the best interests of pupils		Head	DOE/ HOS			
11. Premises, Insurance and Health and Safety							
11.1	Trust Insurance Programme (RPA)	Board	CFO	FARC		Head / LGB	
11.2	Local Level Insurance (additional insurance needed)	LGB	HT ABL	CFO		Head	As considered necessary by the LGB additional insurance can be arranged chargeable to the school.
11.3	Maintain asset management register - Trust	FARC	DCFO	CEO			

	Delegated Duty	Approve	Do	Control	Suggest	Inform	Comments
11.4	Maintain asset management register - School	LGB	ABL	Head			
11.5	Developing Trust buildings strategy or master plan.	FARC	HOE	CFO			
11.6	To determine the allocation prioritisation of school conditions funding.	FARC	HOE	CFO			
11.7	Maintaining buildings, including developing properly funded maintenance plan.	HT	ABL	LGB			
11.8	To institute a health and safety policy.	Board	HOE	CEO			
11.9	To ensure the adoption / adaptation of the Trust H&S Policy to reflect the school's local arrangements.	LGB	Head	HOE			
11.10	To ensure that health and safety and statutory maintenance regulations and safeguarding are followed.	HT	ABL	HOE			
12. I.C.T and Digital Strategy							
12.1	To approve the Trust-wide digital strategy and monitor its impact	FARC	HCP			Head	
12.2	Monitor the implementation and impact of the digital strategy	FARC	HCP				
12.3	Implement the digital strategy		HCP	FARC			
12.4	Responsibility to have appropriate digital provision in line with the Trusts digital strategy. – Schools		Head				
13. Governance							
13.1	To draw up governing documents and any amendments thereafter.	Board	DCA			Head / ABL/ LGB	The Trust will approve; LGB to implement with support from the Governance Team. e.g. scheme of delegation / terms of reference and BDAT Statutory policies
13.2	To appoint (and remove) the Chair of the LGB	Board	DCA			Head / ABL	
13.3	To appoint (and remove) the Clerk to the LGB.	Chair of LGB	DCA			Board / Exec /Head / ABL	
13.4	To appoint and remove members of the LGB.	Board LGB	Chair	DCA		Head/LGB	
13.5	To set up a Register of members' Business Interests.	Board	DCA				Trust Governance Team to ensure implementation and publication on Trust website.

	Delegated Duty	Approve	Do	Control	Suggest	Inform	Comments
13.6	To approve and set up a members and Trustee and Governors Expenses Scheme.	FARC	CFO			LGB	Finance Team to write and FARC to approve. Trust Governance Team to ensure shared at point of induction.
13.7	To ensure specialist governors, Vice chair, SEND and Safeguarding discharge duties in line with these roles	LGB	LGB			Head	
14. Safeguarding							
14.1	To develop statutory Trust safeguarding policies in line with statutory requirements and best practice.	Board	HOS	Named SG Trustee		Head / LGB	
14.2	To ensure all central staff and trustees have completed all mandatory safeguarding training - Trust		HOS	CEO			
14.3	To ensure all staff and governors have completed all mandatory safeguarding training- School		Head	HOS			
14.4	To provide termly Safeguarding Report to the Board using the Trust template.	Board	HOS	CEO			
14.5	To provide termly Safeguarding Report to the LGB using the Trust template.	COG	Head	HOS			
14.6	Maintain accurate and effective and secure pupil records in line with the agreed Trust CPOMS categories and protocols.	LGB	Head	HOS			
14.7	Maintain accurate and effective and secure employee records by using the Trust SCR and Personnel File templates- Trust	CEO	HOS	Named Trustee			
14.8	Maintain accurate and effective and secure employee records by using the Trust SCR and Personnel File templates		Head	HOS			
15. Compliance							
15.1	To maintain and publish Trust policies and guidance including a schedule for review.	Board	DCA			LGB	
15.2	To maintain and publish local policies and guidance - School	Head	LGB	DCA			
15.3	Comply with all GDPR Data protection and good practice – Trust	Board	DCFO /DCA	Audit			
15.4	Comply with all GDPR Data protection and good practice		Head	DCFO		LGB	

	Delegated Duty	Approve	Do	Control	Suggest	Inform	Comments
	– Trust			/DCA			
15.5	To ensure that schools websites meet all legal and BDAT requirements.		Head	DCA		LGB	
15.6	To ensure that there is a Gifts and Hospitality policy and register in place – Trust	FARC	CFO				
15.7	To ensure that there is a Gifts and Hospitality policy and register in place - School	LGB	Head				
15.8	To complete the gifts and hospitality register -Trust	FARC	CFO				
15.9	To complete the gifts and hospitality register – School	LGB	Head				
16. Legal							
16.1	Exceptional HR activity such as settlement agreements	CEO	HR	Board	Head	Board	
16.2	Complaint to the Secretary of state in regard to the admission of a pupil or an Academy being named on an EHCP		Head	DCA			

Annexe 1: Other Policy

Trust Level Policies
Complaint policies and procedures.
HR employment policies and procedures
Finance Policies and procedures
Health and Safety - Trust
Equality Objectives: Trust
Charging and Remissions policy - Trust
Safeguarding - Trust
School Level Policies
Accessibility Policy and Plan
EYFS Policies
SEND Policy and information
School Uniform Policy
Curriculum policy – Including PSHE and RSE
Behaviour Policy and Anti bullying Statement
Exclusions and Suspensions
Careers Policy – Provider Access
Health and Safety - School
First Aid
Equality Information and Objectives: School
Attendance Policy
Support for Pupils with medical conditions
Safeguarding
Collective Worship
Mobile phone policy / statement
Restrictive Handling

Annexe 2: Acronym Guide

CEO	Chief Executive Officer	CFARC	Chair of Finance and Resource Committee
CFO	Chief Financial Officer	LGB	Local Governing Body
FARC	Finance and Resource Committee	DCA	Director of Corporate Affairs
DOE	Director of Education	RC	Remuneration Committee
HOE	Head of Estates	HCP	Head of Corporate Projects
DCFO	Deputy Chief Financial Officer	HOS	Head of Safeguarding
COTB	Chair of the Trust Board		