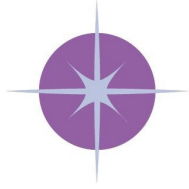


Scheme of Delegation 2026-27



BATH & WELLS
Multi Academy Trust

'That they may have life, life in all its fullness' John 10:10



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Introduction

The Bath and Wells Diocesan Academies Trust (BWMAT) is a legal entity with the Board of Trustees having collective accountability and responsibility for the Trust. Because the majority of the Trust's schools are Church of England schools, the Trust has a legal relationship with the Bath and Wells Diocesan Board of Education (DBE). The Trust's Corporate Member is the Diocesan Director of Education.

All multi academy trusts (MATs) are required to have a Scheme of Delegation (SoD) which details any delegation of the Board's responsibilities to the various layers of governance within the Trust. This is predicated on the fact that, within a MAT, identified local governance groups are committees of the Board of Trustees and all responsibility for the functioning of local governance is determined by the Board of Trustees. The day-to-day operation of the Trust is subject to the executive authority of the Chief Executive Officer (CEO). The CEO exercises executive leadership through the Trust Team and regional hub structure. The CEO is responsible for the line management and performance of Headteachers and may delegate aspects of operational management, school improvement and quality assurance to other members of the executive team whilst retaining overall accountability.

This Scheme of Delegation makes clear the relationship between the Board, its committees and the school-level Trust Local Committees (TLCs) and reflects the format suggested by the National Governance Association. The differences between this revised Scheme of Delegation and the previous one reflect the move to a new model of service delivery predicated on regional hubs. We have attempted to make this revised version as simple and straightforward as possible, so that everyone is clear about their responsibilities. Supporting detail for this SoD is contained within a separate Governance Handbook ([LINK](#))

The SoD must comply with our statutory Trust documentation including the Articles of Association and Funding Agreement. For nearly all of the tasks featured in the delegation matrix, the Board is the accountable entity, even if the task is delegated to another group or individual in the organisation to undertake. The exception to this is a small number of procedures, identified within Companies Act 2006, that sit with the Trust's Members alone and cannot be delegated.

The governance groups identified in the Scheme of Delegation are as follows:

Members – this group acts as the Trust's shareholder group and has ultimate control over the direction of the Trust and must ensure that the Trust achieves its charitable objects.

Board of Trustees – the role of the Board is to provide strategic leadership, accountability and assurance and strategic engagement. The Board has collective accountability and strategic responsibility for the trust. It has a focus on ensuring the trust delivers an excellent education to pupils while maintaining effective financial management.

Committees of the Board of Trustees – the Board can determine any supporting committee structure. The Board's dedicated Trustee committees reflect the three main areas of accountability - Audit and Risk, Education & Ethos and Finance.

Committees of the Board of Trustees – local governance. The Board has determined that each school/identified group of schools will have a local governance committee – Trust Local Committee (TLC) The TLCs are formal committees of the Board and operate subject to Terms of Reference set by the Board. The function and operation of the TLCs are determined by the Board.

Whilst this scheme intends to cover all foreseen aspects of responsibility and procedure it is not exhaustive and when in doubt all parties should engage in meaningful consultation before acting, in order to ensure that the Trust meets the regulations as set out in the Academy Trust Governance Guide and the Academy Trust Handbook.

Our delegation matrix is a clear and straightforward way of summarising who is responsible for each key area in our Trust.

The  indicates where the responsibility lies to make a decision or complete a task. In some cases, consultation with the Trust is required before action can be taken and these areas show a  as well as the .

There are separate terms of reference for each of the board's committees, including Trust Local Committees, and these supplement the Scheme of Delegation. Our Governance Handbook also supports the Scheme of Delegation. The terms of reference for each committee document the delegated responsibilities for each committee in detail, as well as the operating arrangements for each committee. Both the scheme of delegation and the committee terms of reference can be found on the trust's website.



The Trust has a clear vision for what it wants to achieve. The Scheme of Delegation is our vehicle to ensure that we make the decisions that will get us there.

1. Governance

		Members	Board of Trustees	Audit & Risk Committee	Education & Ethos Committee	Finance Committee	Trust Local Committee	CEO	Head Teacher
1.1	Appoint/remove members	✓							
1.2	Appoint/remove/recommend appt of trustees	✓	✓						
1.3	Elect chair/vice chair of trustees annually		✓						
1.4	Appoint committee chairs annually and remove when necessary		✓						
1.5	Determine powers of chair of trustees in urgent situations		✓						
1.6	Establish and review trust governance structure		✓						
1.7	Agree named safeguarding trustee		✓						
1.8	Agree named trustee for whistleblowing		✓						
1.10	Appoint trust governance professional (GP)		✓						
1.11	Input into trust GP professional growth annually		✓						
1.12	Articles of association: review		✓						
1.13	Articles of association: ratify changes	✓							
1.14	Agree scheme of delegation and complete annual review		✓						
1.15	Agree committee terms of reference (including TLCs) and complete annual review		✓						
1.16	Agree role description for identified link trustee roles		✓						
1.17	Agree trust board and committee meeting dates		✓						
1.18	Commission external review of governance every three years		✓						

1. Governance, continued

		Members	Board of Trustees	Audit & Risk Committee	Education & Ethos Committee	Finance Committee	Trust Local Committee	CEO	Head Teacher
1.19	Complete annual trust board self-evaluation		✓						
1.20	Publish governance arrangements on trust website							✓	
1.21	Ensure trust and school websites are compliant and effective							✓	
1.22	Maintain Board compliance on GIAS and Companies House							✓	
1.23	Submit annual report on the performance of the trust to members		✓						
1.24	Maintain register of interests		✓						
1.25	Maintain a trustee/TLC member expenses policy		✓						
1.26	Approve statutory policies*		✓						
1.27	Ensure there is a clear approach to maintenance and adoption trust policies							✓	
1.28	Appoint/remove TLC chairs		✓						
1.29	Appoint/remove TLC members		✓						
1.30	Agree TLC clerking arrangements							✓	
1.31	Appoint and dismiss Governance & Compliance Leads (G&CLs)							✓	
1.32	Agree TLC meeting dates								✓
1.33	Review local governance as part of triannual external review		✓						
1.34	Set clear expectations on visits to schools by Trustees		✓						
1.35	Ensure board reporting channels are established		✓						

1. Governance, continued

		Members	Board of Trustees	Audit & Risk Committee	Education & Ethos Committee	Finance Committee	Trust Local Committee	CEO	Head Teacher
1.36	Set expectations of trustee and committee member (including TLC members) conduct		✓						
1.37	Ensure an appropriate skill set on the board, including appropriate financial skills and understanding		✓						
1.38	Establish a process for parent elections and appointments		✓						
1.39	Promote a culture of diversity and inclusion, including ensuring a diverse board and TLCs which are representative of the communities they serve		✓						
1.4	Determine trust's values, vision, strategy, ethos/culture and key priorities		✓					✓	
1.41	Monitor progress of Trust's Strategic Plan		✓						
1.42	Approve non-statutory trust policies							✓	
1.43	Determine school level procedures to support Trust policy							✓	✓

2. Executive leadership

		Members	Board of Trustees	Audit & Risk Committee	Education & Ethos Committee	Finance Committee	Trust Local Committee	CEO	Head Teacher
2.1	Deliver trust strategy								
2.2	Educational standards								
2.3	Financial performance								
2.4	Compliance								
2.5	School improvement								
2.6	HT accountable								
2.7	Risk management								
2.8	Trust growth implementation								

3. Workforce

			Members	Board of Trustees	Audit & Risk Committee	Education & Ethos Committee	Finance Committee	Trust Local Committee	CEO	Head Teacher
Appointing/ dismissing	3.1	CEO/Accounting Officer		✓						
	3.2	Other central team staff							✓	
	3.3	Headteacher							✓	
	3.4	School level staff members								✓
Professional Growth (FP) and determining pay/ progression	3.5	CEO and DCEO		✓						
	3.6	Other staff members of Trust team							✓	
	3.7	Headteacher							✓	
	3.8	School level staff members								✓
Undertake panel hearings for staffing procedures such as disciplinary, grievance and capability matters	3.9	CEO		✓						
	3.10	Other staff members of central team							✓	
	3.11	Headteacher							✓	
	3.12	school level staff members							✓	
	3.13	Determine executive team staffing structure							✓	
	3.14	Determine school level staffing structure							✓	

3a. Workforce - School leadership accountability for performance

			Members	Board of Trustees	Audit & Risk Committee	Education & Ethos Committee	Finance Committee	Trust Local Committee	CEO	Head Teacher
	3a.1	Line manage Headteachers and ensure professional accountability arrangements							✓	
	3a.2	Hold headteachers accountable for safeguarding arrangements at a school level							✓	
	3a.3	Direct support, challenge and intervention according to Education Strategy							✓	
	3a.4	Ensure effective deployment of School Improvement Strategy across the Trust and regional hubs							✓	
	3a.5	Implement school improvement approach (Categorisation)							✓	
	3a.6	Escalate and report significant educational safeguarding and operational risks to the Executive							✓	
	3a.7	Participate in Trust wide quality assurance and school improvement activities							✓	

3b. Workforce - Leadership Accountability, Performance and School Improvement

			Members	Board of Trustees	Audit & Risk Committee	Education & Ethos Committee	Finance Committee	Trust Local Committee	CEO	Head Teacher
	3b.1	Establish and maintain the Trust's leadership accountability framework							✓	
	3b.2	Line manage Headteachers and ensure clear professional accountability arrangements							✓	
	3b.3	Conduct annual Headteacher appraisal, objective setting and performance review arrangements							✓	
	3b.4	Hold Headteachers to account for educational standards, safeguarding, finance, compliance and delivery of Trust priorities							✓	
	3b.5	Ensure effective deployment of school improvement capacity across the Trust and regional hubs							✓	
	3b.6	Direct support, challenge and intervention for schools causing concern or requiring additional support							✓	
	3b.7	Escalate significant educational, safeguarding, financial or operational concerns to the Board as appropriate							✓	
	3b.8	Develop and implement school improvement plans in line with Trust priorities							✓	✓
	3b.9	Report regularly on school performance, improvement priorities and emerging risks							✓	✓
	3b.10	Participate in Trust-wide leadership, quality assurance and school improvement activities							✓	✓

Within the Trust's regional hub structure, the CEO may delegate the operational management of Headteachers and delivery of school improvement activity to designated senior leaders, including the Deputy CEO and Regional Hub Directors. Such delegation does not remove the CEO's accountability for these functions.

4. Curriculum and Teaching & Learning

		Members	Board of Trustees	Audit & Risk Committee	Education & Ethos Committee	Finance Committee	Trust Local Committee	CEO	Head Teacher
4.1	Approve trust approach to curriculum							✓	
4.2	Agree equality information and objectives (public sector equality duty) statement and monitor delivery		✓					✓	
4.3	Develop curriculum strategy							✓	
4.4	Implement curriculum framework							✓	
4.5	Curriculum quality assurance							✓	
4.6	Teaching and learning framework							✓	
4.7	Professional development linked to curriculum							✓	
4.8	Curriculum led School Improvement							✓	
4.9	Ensure provision of religious education							✓	✓
4.10	Ensure delivery of collective worship							✓	✓
4.11	Ensure compliance with SMSC requirements including the promotion of British values		✓					✓	✓
4.12	Monitor the inclusiveness of the curriculum							✓	✓

4. Curriculum and Teaching & Learning, continued

		Members	Board of Trustees	Audit & Risk Committee	Education & Ethos Committee	Finance Committee	Trust Local Committee	CEO	Head Teacher
4.13	Develop and maintain a Trust-wide curriculum strategy.							✓	
4.14	Monitor the quality and consistency of curriculum implementation across schools.							✓	
4.15	Develop curriculum strategy							✓	
4.16	Develop Trust-wide approaches to teaching, learning and assessment.							✓	
4.17	Promote curriculum innovation, collaboration and sharing of best practice across schools.							✓	
4.18	Monitor curriculum impact on pupil outcomes across the Trust.							✓	

5. Assessment, standards and outcomes

		Members	Board of Trustees	Audit & Risk Committee	Education & Ethos Committee	Finance Committee	Trust Local Committee	CEO	Head Teacher
5.1	Trust assessment framework							☒	
5.2	Set targets for pupil outcomes across trust and monitor in-year data termly							✓	✓
5.3	Monitor curriculum impact on pupil outcomes across the Trust							☒	
5.4	Agree school improvement strategies							✓	
5.5	Determine use of pupil premium							✓	
5.6	Monitor impact of pupil premium				✓	✓	✓	✓	✓
5.7	Determine use and monitor impact of sports premium (Ends Dec 26)				✓	✓	✓	✓	✓
5.8	Set the dates of school terms and holidays		✓					✓	
5.9	Set the times of school sessions		✓					✓	
5.10									
5.11	Ensure effective and compliant trust-wide SEND provision		✓					✓	
5.12	Regularly monitor compliance with SEN code of practice							✓	
5.13	Monitor effectiveness of SEND provision at Trust/school level, ensuring compliance with relevant policies and statutory requirements				✓		✓	✓	✓

6. Inclusion, SEND and vulnerable pupils

		Members	Board of Trustees	Audit & Risk Committee	Education & Ethos Committee	Finance Committee	Trust Local Committee	CEO	Head Teacher
6.1	Implement SEND strategy							✓	✓
6.2	Monitor SEND compliance							✓	✓
6.3	Monitor SEND code practice compliance							✓	✓
6.4	Monitor disadvantaged pupils							✓	✓
6.5	Monitor LAC							✓	✓
6.6	Monitor EAL							✓	✗
6.7	Monitor pupil wellbeing							✓	✗
6.8	Ensure free school meal provision is adequately implemented					✓		✓	✓
6.9	Ensure the provision of universal infant free school meals					✓		✓	✓
6.10	Deliver inclusive extra-curricular activities				✓			✓	✓
6.11	Monitor children's wellbeing and how this is actively supported				✓		✓	✓	✓

7. Safeguarding and welfare

		Members	Board of Trustees	Audit & Risk Committee	Education & Ethos Committee	Finance Committee	Trust Local Committee	CEO	Head Teacher
7.1	Monitor compliance with safer recruitment requirements							✓	✓
7.2	Monitor staff wellbeing and workload						✓	✓	✓
7.3	Monitor staff statutory training (safeguarding, prevent, H&S etc) and impact of CPD						✓	✓	✓
7.4	Ensure appointment of DSLs and deputy DSLs							✓	
7.5	Ensure appointment of SENCOs								✓
7.6	Monitor safeguarding arrangements at school level, ensuring compliance with relevant policies and statutory requirements.		✓				✓	✓	✓
7.7	Complete and maintain Single Central Record (SCR)							✓	✓
7.8	Receive routine reports on the status of the SCR			✓			✓		
7.9	Monitor attendance and persistent absence of pupils				✓		✓	✓	✓
7.10	Monitor pupil behaviour data across different pupil groups				✓		✓	✓	✓
7.11	Review headteacher decision to suspend/exclude pupils							✓	
7.12	Monitor rates of suspension and exclusion across the trust/school				✓		✓	✓	✓
7.13	Ensure school food standards are met for pupils		✓					✓	✓

8. Finance

		Members	Board of Trustees	Audit & Risk Committee	Education & Ethos Committee	Finance Committee	Trust Local Committee	CEO	Head Teacher
8.1	Appoint and performance manage chief financial officer (CFO)							✓	
8.2	Produce trust's financial manual to further expand on processes relating to delegated financial powers		Trust board to approve					✓	
8.3	Produce annual report and accounts	Members to receive	Trust board to approve					✓	
8.4	Submit required financial reports and returns							✓	
8.5	Approve budget plan to support delivery of trust strategic priorities		✓					✓	
8.6	Review budget plan to support delivery of Trust's strategic priorities					✓		✓	
8.7	Monitor trust budget					✓		✓	
8.8	Approve long term financial plans		✓			✓			
	Monitor impact of long-term financial plans								

8. Finance, continued

		Members	Board of Trustees	Audit & Risk Committee	Education & Ethos Committee	Finance Committee	Trust Local Committee	CEO	Head Teacher
8.9	Develop three-year budget forecast					✓		✓	
8.10	Approve and submit three-year budget forecast		✓						
8.11	Carry out benchmarking and trust-wide value for money evaluation					✓		✓	
8.12	Agree reporting and monitoring arrangements for trust and school budgets					✓		✓	
8.13	Prepare management accounts every month setting out the trusts financial performance and position							✓	
8.14	Approve expenditure/contracts above specified threshold		✓						

9. Operations

		Members	Board of Trustees	Audit & Risk Committee	Education & Ethos Committee	Finance Committee	Trust Local Committee	CEO	Head Teacher
9.1	Appoint and remove external auditors	✓							
9.2	Receive external auditor's report		✓	✓					
9.3	Ensure ATH requirements relating to the review of the external auditor's plans, findings and effectiveness are adhered to			✓					
9.4	Action recommendations arising from internal audits			✓				✓	
9.5	Agree and deliver a programme of internal scrutiny ensuring the effective use of external third-parties to support the trust			✓					
9.6	Agree risk management policy		Board to approve	✓				✓	
9.7	Oversee the risk register and undertake a full review at least annually		✓						
9.8	Undertake termly review of risk register			✓	✓	✓			
9.9	Manage and report on risk mitigation strategies						✓	✓	
9.10	Maintain trust contingency and business continuity plans							✓	
9.11	Monitor implementation of, and compliance with, health and safety policy and procedures at school level							✓	✓
9.12	Agree premises management documents, including estate vision, estate strategy and asset management plan		✓					✓	
9.13	Monitor school estates to ensure they are safe and well-maintained					✓		✓	

9. Operations, continued

		Members	Board of Trustees	Audit & Risk Committee	Education & Ethos Committee	Finance Committee	Trust Local Committee	CEO	Head Teacher
9.14	Ensure that there is suitable expert support on health and safety							✓	
9.15	Secure suitable insurance (commercial and/or the risk protection arrangement (RPA)) for the trust							✓	
9.16	Develop a cyber security framework							✓	
9.17	Agree on proportionate controls that address the risks of fraud, irregularity and theft through relevant policies and processes			✓				✓	
9.18	Ensure there is adequate company secretarial support							✓	
9.19	Appoint a data protection officer (DPO)							✓	

10. Parents, Community and Admissions

		Members	Board of Trustees	Audit & Risk Committee	Education & Ethos Committee	Finance Committee	Trust Local Committee	CEO	Head Teacher
10.1	Set Admissions policy for trust		✓						
10.2	Implement admissions appeal process						✓		
10.3	Monitor admissions process and pupil numbers across Trust			✓					
10.4	Review complaints at panel stage		✓						
10.5	Monitor all complaints raised (including through external agencies e.g. LA, DfE and Ofsted) across the trust			✓				✓	
10.6	Engage with key stakeholders at school and community level						✓		✓