

# Scheme of Delegation



Pride  
Passion  
Partnership  
Professionalism  
Positivity

<b>Name of Document</b>	Financial Scheme of Delegation/Authorisation and Approval Summary
<b>Status</b>	Approved by Trust Board of Directors
<b>Date Approved</b>	15 June 2023
<b>Policy Approver</b>	Harold Reid, CFOO
<b>Policy Owner</b>	Harold Reid, CFOO
<b>Policy Author</b>	Harold Reid, CFOO
<b>Next Review Date</b>	March 2024

Please note that all Trust policies are reviewed annually. Should you have any queries regards this policy, note an omission or wish to propose an amendment, please email [mattheweldon.lake@thebridgetrust.academy](mailto:mattheweldon.lake@thebridgetrust.academy)

## Key

Level 1: Trust Board Level 2: Chief Executive

Level 3: Chief Financial and Operating Officer (CFOO)

Level 4: Local Governing Body (LGB)

Level 5: Headteacher, in consultation with CEO, CFOO, and local CoG where appropriate

Although decisions may be delegated to the Local Governing Body or Head of School, the Trust Board as a whole remains responsible for any decision made under delegation and may overrule the Local Governing Body/Head of School where appropriate.

	Tasks	Trust Board	FI & A Cttee	Chief Executive	CFOO	LGB	Head Teacher
<b>1.</b>	<b>Financial Governance &amp; Management</b>						
1.1	Trust and School Financial Regulations (including key policies)	X	X		X		
1.2	Trust and Financial Procedures	X	X		X		
1.3	Trust Procurement Policy	X	X		X		
1.4	Trust 3 Year Budget Plan	X	X		X		
1.5	Trust 1 Year Budget Plan	X	X		X		
1.6	Trust Consolidated Financial Statements	X	X		X		
1.7	Trustees' Report	X		X			
1.8	Appoint Trust auditors	X	X				
1.9	Response to Auditor's Management Letter	X					
1.10	School 3 Year Budget Plan		X		X		
1.11	School 1 Year Budget Plan		X		X		
1.12	Financial Returns to ESFA			X	X		
<b>2.</b>	<b>Governance</b>						
2.1	Trust Scheme of Delegation	X		X	X		
2.2	New Academies Joining Trust	X		X	X		
2.3	Local Governing Body (LGB) Terms of Reference	X		X		X	
2.4	Appointment of Chair of Trust Board*	X					
2.5	Appointment (and removal) of Chair of LGBs	X					
2.6	Appointment (and removal) of Vice Chair of LGBs					X	
2.7	Appointment of Board Sub Committees, if any	X					
2.8	Appointment (and removal) of Clerk to the Trust Board	X					
2.9	Appointment (and removal) of Clerk to LGBs	X					
2.10	Calendar of Trust Board and LGB Meetings			X			
<b>3.</b>	<b>Financial Authorisation</b>						
3.1	Budgeted Expenditure (Excluding Contracts) up to £5,000						X
3.2	Budgeted Expenditure (Excluding Contracts) Between £5,000 and £60,000			X	X		
3.3	Budgeted Expenditure (Excluding Contracts) Between £60,000 and Find a Tender Limit		X				
3.4	Budgeted Expenditure (Excluding Contracts) over Find a tender limit	X					
3.5	All Contracts			X	X		
3.6	Disposals or Write-Off of Stock, Assets or Debts Up To £1,000				X		
3.7	Disposals or Write-Off of Stock, Assets or Debts Over £1,000			X	X		
3.8	All Settlements/Compensation Payments Up To £50,000 (AFH Limit)	X					

3.9	Settlements/Compensation Payments Over £50,000	X					
3.10	Capital Projects in excess of Find a Tender Limit	X	X				
4.	School Performance, Curriculum & Teaching						
4.1	School Performance Targets			X			
4.2	Annual School Development Plans					X	X
4.3	Curriculum			X			X
4.4	Teaching & Learning Policy			X		X	X
4.5	Sex Education & Relationships Policy			X		X	X
4.6	Religious Education Policy			X		X	X
5.	Staff Policies and Pay						
5.1	Pay and Remuneration Policy	X					
5.2	Job Role Salary and Grading			X	X		
5.3	Changes to Employees Terms and Conditions or Collective Agreements	X					
5.4	CEO/CFOO Annual Pay Award	X					
5.5	Head Teacher Annual Pay Award		X	X			
5.6	Teachers' & Support Staff Pay Progression		X	X			
5.7	Statutory Teacher and Support Staff Pay Award		X		X		
5.8	Central Office Staff Annual Pay Award		X		X		
5.9	Performance Management and Appraisal Review Policy	X		X			
5.10	Disciplinary Policy	X		X			
5.11	Grievance Policy	X		X			
5.12	Capability Policy	X		X			
5.13	Whistleblowing Policy	X		X			
5.14	Restructuring and Redundancy Policy	X		X	X		
5.15	Employee Health and Safety Policy	X		X	X		
6.	Staff Management						
6.1	School Organisation Structure	X		X	X		
6.2	Central Office Organisation Structure			X	X		
6.3	Staff Recruitment – Posts Included in Current Structure and Budget						X
6.4	Staff Recruitment – Posts Not Included in the Current Structure and Budget			X	X		
6.5	Head Teacher Appointment	X		X		X	
6.6	Deputy Head of School Appointment			X		X	X
6.7	Senior Leadership Appointment					X	X
6.8	Teaching and Support Staff Appointment						X
6.9	Suspension Procedures for CEO	X					
6.10	Dismissal of CEO	X					
6.11	Appeal of CEO Against Dismissal	X					
6.12	Suspension Procedures for the Head of School and Central Office Employees			X	X		
6.13	Dismissal of Head of School	X		X			
6.14	Appeal of the Head of School Against Dismissal	X					
6.15	Suspension of Any Teaching or Support Staff			X			
6.16	Dismissal of Any Teaching or Support Staff			X			
6.17	Appeal of Any Teaching or Support Staff Against Dismissal	X		X		X	
7.	School Policies and Procedures						
7.1	School Day			X			
7.2	Term Time and Holidays			X			
7.3	Inset Days			X			

7.4	School (PAN)	X		X			
7.5	Change of Age Range	X		X			
7.6	Child Protection and Safeguarding Policy	X		X			X
7.7	Attendance Policy	X		X			
7.8	Student Behaviour & Exclusions Policy	X		X			
7.9	Fixed-Term Exclusion			X			X
7.10	Permanent Exclusion			X			
7.11	Complaints Procedure	X		X	X		
7.12	Admissions Policy	X		X			
7.13	School Prospectus			X			
7.14	School Website			X			
7.15	School Logo and Branding			X			
7.16	School Uniform			X			
7.17	School Trips Policy			X			
7.18	Pupil Premium Report						X
7.19	Year 7 Catch Up Report						X
7.20	Accessibility Plan						X
7.21	Travel Plan						X
8.	Premises and Assets						
8.1	Asset Management Policy and Plan	X			X		
8.2	Health and Safety Policy	X		X	X		
8.3	Estates Management Strategy	X			X		

NB: X\* in Item 2.4 refers to the fact that up to 5 Directors may be appointed by the Members by ordinary resolution.

**Policy Owner and Contact Details**

Harold Reid, CFOO

For further information on the Policy, please contact via email [harold.reid@thebridgetrust.academy](mailto:harold.reid@thebridgetrust.academy) or phone 020 7619 1000

Next Review Date: 31 March 2024