

Scheme of Delegation



Pride
Passion
Partnership
Professionalism
Positivity

Name of Document	Financial Scheme of Delegation/Authorisation and Approval Summary
Status	Approved by Trust Board of Directors
Date Approved	21 March 2024
Policy Approver	Harold Reid, CFOO
Policy Owner	Harold Reid, CFOO
Policy Author	Harold Reid, CFOO
Next Review Date	March 2025

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

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	Remuneration Cttee	FAR Cttee	Chief Executive	CFOO	LGB	Headteacher
1. Financial Governance & Management							
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		
2. Governance							
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			
3. Financial Authorisation							
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 and Other Senior Executives Annual Pay Award	X	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		X	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.

Document Owner and Contact Details

Harold Reid, CFOO

For further information on the Policy, please contact via email harold.reid@thebridgetrust.academy or phone 020 7619 1000

Next Review Date: 31 March 2025