Scheme of Delegation

The Bridge Trust

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 <u>mattheweldon.lake@thebridgetrust.academy</u>



Кеу

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.

Image: space of the system o		Tasks							
1.1Trust and School Financial Regulations (including key policies)XXX			Trust Board	Remuneration Cttee	FAR Cttee	Chief Executive	CF00	LGB	Headteacher
IndustationIndustationImage and the product of	1.	Financial Governance & Management							
Induction induc	1.1	Trust and School Financial Regulations (including key policies)	х		Х		Х		
1.4Trust 3 Year Budget PlanXXXZZZXXXZZZXXXZZZZZXXZZZZZXXZZZZZZZZZZZZZZZZZZZZ <td>1.2</td> <td>Trust and Financial Procedures</td> <td>х</td> <td></td> <td>Х</td> <td></td> <td>х</td> <td></td> <td></td>	1.2	Trust and Financial Procedures	х		Х		х		
1.5Trust 1 Year Budget PlanXXZZZ <td>1.3</td> <td>Trust Procurement Policy</td> <td>Х</td> <td></td> <td>Х</td> <td></td> <td>Х</td> <td></td> <td></td>	1.3	Trust Procurement Policy	Х		Х		Х		
1.6Trust Consolidated Financial StatementsXXZZXXXZZXXXXZXXZZZXXXZZZXXZZZXXZZZXXZZZZXXZZZZXXZZZZ	1.4	Trust 3 Year Budget Plan	Х		Х		Х		
1.7Trustees' ReportXXZXZZZXXXZZZXXXZZZZXXXZZZZXXXZZZZZXXZZZZZXXZZZZZXXZZZZZXXZZZZZZXXZZZZZZXXZZZZZZZZZZZZZZZZZZZZZZZZZZ </td <td>1.5</td> <td></td> <td>Х</td> <td></td> <td>Х</td> <td></td> <td>Х</td> <td></td> <td></td>	1.5		Х		Х		Х		
1.8Appoint Trust auditorsXXXXIII1.9Response to Auditor's Management LetterXXX <t< td=""><td>1.6</td><td></td><td>Х</td><td></td><td>Х</td><td></td><td>Х</td><td></td><td></td></t<>	1.6		Х		Х		Х		
1.9Response to Auditor's Management LetterXXXZZZXXZZZXXZZZZXXZZZXXZZZXXXZZZZXXXZZZZXXXZZZZXXXZZZZXXXZZZZZXXXZZZZXXXZZZZXXXZZZZZXXXZZZZZXXZZZZZZZZZZZZZZZZZZZZZZZZZZZZZZZZZZ						Х			
1.10School 3 Year Budget PlanNXXXZZ1.11School 1 Year Budget PlanXGovernanceXXXXXXXXXZZ2.GovernanceXXXXXXXXXXZZ2.1Trust Scheme of DelegationXXXXXXXXZZZXXXXXZZZXXXXXZZZXXXXXZZZZXXXXXZZZZXXXXZZZZZXXXZZZ </td <td></td> <td>••</td> <td></td> <td></td> <td>Х</td> <td></td> <td></td> <td></td> <td></td>		••			Х				
1.11School1 Year Budget PlanNXXXNXXXZZ2.GovernanceXNew Academies Joining TrustXXXXXXXXXZZ2.3Local Governing Body (LGB) Terms of ReferenceXXXXXXZZXXXZZZXXXXZZZXXXXZZZXXXXZZZXXXXZZZXXXXZZZZXXXXZZZXXXZZZZXXXZZZZZXXXZZZZXXXZZZZZZZZZZZZZZZZZZZZZZZZZZZZZZZZZZ <td></td> <td></td> <td>Х</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>			Х						
1.12Financial Returns to ESFAImage: Constraint of Co									
2.GovernanceII					Х				
2.1Trust Scheme of DelegationXXX </td <td></td> <td></td> <td></td> <td></td> <td></td> <td>X</td> <td>х</td> <td></td> <td></td>						X	х		
2.2New Academies Joining TrustXXXZZZXXZZXZZZZZXZZ<									
AndAn	2.1		Х			Х			
2.4Appointment of Chair of Trust Board*XXIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	2.2	-	Х			Х	Х		
2.5Appointment (and removal) of Chair of LGBsXII<	2.3	Local Governing Body (LGB) Terms of Reference	Х			Х		Х	
2.6Appointment (and removal) of Vice Chair of LGBsImage: Constraint of Board Sub Committees, if anyXImage: Constraint of Board Sub Constraint of Board Sub Constraints)XImage: Constraint of Board Sub Constraints, Image: Constraint of Board Sub Constraint of Board Sub Constraints, Image: Constraint of Board Sub Constraint of Board Sub Constraints, Image: Constraint of Board Sub Constraint of Board Sub Constraints, Image: Constraint of Board Sub Constraints, Image: Constraint of Board Sub Constraints, Image: Constraint of Board Sub Constraint of Board Sub Constraints, Image: Constraint of Board Sub Constraint, Image: Const	2.4	Appointment of Chair of Trust Board*	Х						
2.7Appointment of Board Sub Committees, if any 2.8XXII <t< td=""><td>2.5</td><td>Appointment (and removal) of Chair of LGBs</td><td>Х</td><td></td><td></td><td></td><td></td><td></td><td></td></t<>	2.5	Appointment (and removal) of Chair of LGBs	Х						
2.8Appointment (and removal) of Clerk to the Trust BoardXImage: Marcine State	2.6	Appointment (and removal) of Vice Chair of LGBs						Х	
2.9Appointment (and removal) of Clerk to LGBsXII<	2.7	Appointment of Board Sub Committees, if any	Х						
2.9Appointment (and removal) of Clerk to LGBsXII<	2.8	Appointment (and removal) of Clerk to the Trust Board	Х						
3.Financial AuthorisationImage: Constraint of the symbol of the sy	2.9		х						
3.1Budgeted Expenditure (Excluding Contracts) up to £5,000IIIIIXX3.2Budgeted Expenditure (Excluding Contracts) Between £5,000 and £60,000IIIXXII3.3Budgeted Expenditure (Excluding Contracts) Between £60,000 and Find a Tender LimitXXXIII3.4Budgeted Expenditure (Excluding Contracts) Detween Find a tender limitXIII <tdi< td="">I<tdi< td=""><td>2.10</td><td>Calendar of Trust Board and LGB Meetings</td><td></td><td></td><td></td><td>х</td><td></td><td></td><td></td></tdi<></tdi<>	2.10	Calendar of Trust Board and LGB Meetings				х			
3.2Budgeted Expenditure (Excluding Contracts) Between £5,000 and £60,000NXXI3.3Budgeted Expenditure (Excluding Contracts) Between £60,000 and Find a Tender LimitXXII3.4Budgeted Expenditure (Excluding Contracts) over Find a tender limitXIIII3.5All ContractsIXXIIIII3.6Disposals or Write-Off of Stock, Assets or Debts Up To £1,000IIIXXII3.7Disposals or Write-Off of Stock, Assets or Debts Over £1,000IIXXII	3.	Financial Authorisation							
3.3Budgeted Expenditure (Excluding Contracts) Between £60,000 and Find a Tender LimitXXII3.4Budgeted Expenditure (Excluding Contracts) over Find a tender limitXIIII3.5All ContractsIXXIII3.6Disposals or Write-Off of Stock, Assets or Debts Up To £1,000IIXXI3.7Disposals or Write-Off of Stock, Assets or Debts Over £1,000IXXI	3.1	Budgeted Expenditure (Excluding Contracts) up to £5,000							Х
LimitXXXX3.4Budgeted Expenditure (Excluding Contracts) over Find a tender limitXXXXX3.5All ContractsXXXXXXX3.6Disposals or Write-Off of Stock, Assets or Debts Up To £1,000XXXXXX3.7Disposals or Write-Off of Stock, Assets or Debts Over £1,000XXXXXX	3.2	Budgeted Expenditure (Excluding Contracts) Between £5,000 and £60,000				Х	Х		
3.5All ContractsXXX3.6Disposals or Write-Off of Stock, Assets or Debts Up To £1,000IIXI3.7Disposals or Write-Off of Stock, Assets or Debts Over £1,000IXXI	3.3				Х				
3.6Disposals or Write-Off of Stock, Assets or Debts Up To £1,000Image: Constraint of the stock of the	3.4	Budgeted Expenditure (Excluding Contracts) over Find a tender limit	Х						
3.7 Disposals or Write-Off of Stock, Assets or Debts Over £1,000 X X X	3.5	All Contracts				Х	Х		
	3.6	Disposals or Write-Off of Stock, Assets or Debts Up To £1,000					Х		
3.8 All Settlements/Compensation Payments Up To £50,000 (AFH Limit) X	3.7	Disposals or Write-Off of Stock, Assets or Debts Over £1,000				Х	Х		
	3.8	All Settlements/Compensation Payments Up To £50,000 (AFH Limit)	Х						



3.9	Settlements/Compensation Payments Over £50,000	Х						
3.10	Capital Projects in excess of Find a Tender Limit	Х		Х	1	1		
4.	School Performance, Curriculum & Teaching							
4.1	School Performance Targets				х			
4.2	Annual School Development Plans						Х	Х
4.3	Curriculum				х			Х
4.4	Teaching & Learning Policy				Х		Х	Х
4.5	Sex Education & Relationships Policy				Х		Х	Х
4.6	Religious Education Policy				х		х	Х
5.	Staff Policies and Pay							
5.1	Pay and Remuneration Policy	Х						
5.2	Job Role Salary and Grading				х	х		
5.3	Changes to Employees Terms and Conditions or Collective Agreements	Х						
5.4	CEO/CFOO and Other Senior Executives Annual Pay Award	Х	Х					
5.5	Head Teacher Annual Pay Award			Х	х			
5.6	Teachers' & Support Staff Pay Progression			Х	Х			
5.7	Statutory Teacher and Support Staff Pay Award			Х		х		
5.8	Central Office Staff Annual Pay Award			Х		Х		
5.9	Performance Management and Appraisal Review Policy	Х			х			
5.10	Disciplinary Policy	Х			х			
5.11	Grievance Policy	Х			Х			
5.12	Capability Policy	Х			Х			
5.13	Whistleblowing Policy	Х			Х			
5.14	Restructuring and Redundancy Policy	Х			Х	Х		
5.15	Employee Health and Safety Policy	Х			Х	Х		
6.	Staff Management							
6.1	School Organisation Structure	Х			Х	Х		
6.2	Central Office Organisation Structure				Х	Х		
6.3	Staff Recruitment – Posts Included in Current Structure and Budget							Х
6.4	Staff Recruitment – Posts Not Included in the Current Structure and Budget				Х	Х		
6.5	Head Teacher Appointment	Х			Х		Х	
6.6	Deputy Head of School Appointment				Х		Х	Х
6.7	Senior Leadership Appointment						Х	Х
6.8	Teaching and Support Staff Appointment							Х
6.9	Suspension Procedures for CEO	Х						
6.10	Dismissal of CEO	Х						
6.11	Appeal of CEO Against Dismissal	Х						
6.12	Suspension Procedures for the Head of School and Central Office Employees				Х	Х		
6.13	Dismissal of Head of School	Х			Х			
6.14	Appeal of the Head of School Against Dismissal	Х						
6.15	Suspension of Any Teaching or Support Staff				Х			
6.16	Dismissal of Any Teaching or Support Staff				Х			
6.17	Appeal of Any Teaching or Support Staff Against Dismissal	Х			Х		Х	
7.	School Policies and Procedures							
7.1	School Day				Х			



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

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 Next Review Date: 31 March 2025