



Bradford College  
**Education Trust**

## **Scheme of Delegation**

<b>Reviewed By</b>	<b>Approved By</b>	<b>Date of Approval</b>	<b>Version Approved</b>	<b>Next Review Date</b>
BCET Board	R Wightman & A Welsh	01.09.14	V2.0	Term 3 2014/15
BCET Board	R Wightman & A Welsh	20.10.15	V3.0	Term 1 2016/17
BCET Board	R Wightman & A Welsh	12.12.17	V4.0	Term 1 2018/19

## Introduction

The Board of Directors of Bradford College Education Trust is responsible under the multi academy trust's articles of association for controlling its management and administration. They have responsibility for directing its affairs, and for ensuring that it is solvent, well-run, and delivering the trust's charitable outcomes for the benefit of the public.

Many of the Board of Director's responsibilities can be delegated to committees or individuals and this document details the delegations that have been approved.

The levels of delegation are as follows:

- Board of Directors (including sub committees)
- Local Governing Bodies of the academy
- Executive Principal/Principal
- BCET Accounting Officer
- BCET Head of Finance

Where responsibility is delegated to the Executive Principal/Principal it is expected that he/she will delegate further within the individual schools (Finance Manager, HR Manager, Vice Principal) but the responsibility for these tasks ultimately lies with the Executive Principal/Principal.

There are also some specific delegations for BCET Head of Finance and BCET Accounting Officer.

The majority of delegations in the document are in relation to the financial affairs of the Trust and this document should be used in conjunction with the Financial Regulations of BCET, Financial Procedures of the individual academies/schools and the Academies Financial Handbook..

Other delegations include:

- HR
- Education
- Asset Management
- Estates

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Area of responsibility	Board of Directors	Local Governing Body	Executive Principal/Principal	Trust Head of Finance	Accounting Officer
<b>Financial Management / reporting requirements</b>					
Ensure Trust's continuing compliance with all ESFA/DfE financial management requirements	✓	✓	✓	✓	✓
Approval of the trust's Financial Regulations and all financial policies	✓				
To consider all relevant financial updates issued from the DfE/ESFA and advise the BoD of any issues affecting the Trust financial administration. Ensure all of this relevant information is brought to the attention of necessary staff.			✓	✓	✓
Approve the Financial Management System and ensure it is suitable for the needs of the Trust	✓				
Review the Financial Management Software for suitability as the Trust changes over time and ensure it remains suitable. Make recommendations to BoD if considered no longer fit for purpose				✓	
Maintenance of a Register of Business Interests for all Directors and Governors			✓	✓	✓

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and senior staff involved in decision making of the awarding of contracts etc					
<b>Month End accounts</b>					
Receive and review Trust consolidated management accounts compiling of Income and Expenditure account, Balance sheet, cash flow and variance analysis	✓				
Preparation of consolidated management accounts and review of individual academy/schools figures on agreed periodic basis		✓ (review of academy's figures )	✓ (review of own academy's figures )	✓	
<b>Year End accounts</b>					
Approval of year end consolidated statutory accounts	✓				
Review of year-end figures from individual academy/studio for inclusion in year-end consolidated year-end accounts		✓	✓	✓	
Preparation of year end consolidated statutory accounts				✓	
<b>Audit process</b>					
Receive External Audit Management Letter and findings report	✓				
Recommend the appointment of External and Internal Auditors				✓	
Appoint External and Internal Auditors	✓				

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Receive Internal Audit reports and report to BOD if considered necessary	✓	✓ (for academy)	✓ (for academy)	✓ (for Trust)	
Ensure all points raised from Internal and External Audit findings are actioned	✓				
<b>Financial Planning</b>					
Review the individual academy/schools annual budget		✓	✓		
Prepare and review of the Trust Consolidated annual budget				✓	
Approve the Trust Consolidated annual budget	✓				
Monitor and control expenditure against budget during the financial year	✓		✓	✓	✓
Review budget monitoring reports and projected out turn position from each individual academy/school	✓	✓		✓	
Control and monitoring of delegated budgets at individual academy/school level			✓		
<b>Approval of Orders and expenditure</b>					
Limits of approval for Secondary Academy	>£50k	£20k - £50k in conjunction with F&GP	Up to £20k (>£10k must also have Senior Finance Officer approval)	Up to £20k with Director of School Improvement	Up to £20k with BCET Head of Finance
Authorisation for advertising of tender above the OJEU limit and awarding of such tenders	✓				

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Review of OJEU notice before publication				✓	
Awarding of contract which has been procured through OJEU	✓ (Delegated members of Board)				✓
Awarding of a contract for goods or services to a Related Party or Connected Party	✓				✓
<b>Provision of goods and services</b>					
Approve procurement policy	✓				
Monitor purchasing regulations to ensure compliance by academies/schools		✓	✓	✓	✓
Review contracts on an ongoing basis (and as part of ensuring the Trust & academy continue to achieve “best value” )			✓	✓	
Ensure that a minimum of 3 quotes re obtained for all purchases and contracts valued between £2,500 and £20,000			✓	✓	
<b>Gifts and Hospitality</b>					
Approval of Gifts and Hospitality policy for the Trust	✓				
Maintain a Register of gifts and hospitality received by members of the academy/school				✓	

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Awarding a gift from the academy/trust under the value of £15 & reporting to Trust Head of Finance			✓		
Awarding a gift over £15 in value	✓				✓
<b>VAT</b>					
To monitor the regulations on VAT ensuring compliance by the Trust			✓	✓	
To complete and submit the reimbursement claim for VAT on a monthly basis				✓	
To collate and submit to the Trust HOF the completed returns for the individual/academy school			✓		
To distribute the reimbursements back to the academies/schools from the Trusts main bank account				✓	
<b>Insurance</b>					
Ensure the arrangements for insurance cover are adequate			✓	✓	
Undertake an assessment for risk management for insurance purposes for the Trust		✓		✓	
<b>Income</b>					
Review and approve a Charging and Remissions policy for the Trust	✓				
Set suitable controls of recording and collection of monies due and for the				✓	



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movement of banking monies for all accounts under the control of the Trust					
Write off of Bad debts in line with the regulations set by the Academies Financial Handbook				✓ (with board approval)	
Ensuring all grants due to the academy/school are collected promptly			✓		
Ensuring all other income due to the academy is collected promptly and banked			✓		
<b>Bank Accounts</b>					
Opening of bank accounts for all parts of the Trust with 2 signatories for all accounts	✓				
Authorised to be a bank signatory on the accounts	✓	✓	✓	✓	✓
Approve bank reconciliations on monthly basis			✓		
<b>Petty Cash</b>					
Agree amount of Petty cash to be held at each site, if approved by BOD	✓				
Maintenance of accounting records, security and regular reconciliation of petty cash			✓		
<b>Assets</b>					
Approval of capitalisation limits and depreciation policy for the Trust	✓				
All assets must be purchased following the delegated limits set out above	✓	✓	✓	✓	

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Ensure all assets purchased are recorded on a Fixed Asset Register, marked as Trust property and existence confirmed on an annual basis.			✓		
Ensure all instances of loss/theft are notified to the BoD to ensure compliance with the Academies Financial Handbook reporting requirements.			✓		
Ensure disposals of assets are in line with the Fixed Asset Management Policy			✓	✓	
Disposal of land and buildings	✓ (only with EFA approval)				
<b>Estates</b>					
Responsible for the maintenance and upkeep of the academy/school properties		✓	✓		
Ensure building and grounds remain Health & Safety compliant, reporting any issues to HoF and monitoring through 4Risk		✓	✓		
Ensure any third party useage on site has appropriate insurance and first aid cover		✓	✓		
Security of academy site		✓	✓		

HR

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Approval of all staff, pay and recruitment policies across the Trust and agree general terms and conditions for all staff	✓				
Agree changes to template contracts of employment	✓				
Appointment of Principals or equivalent to individual academies/schools	✓				
Appointment of Vice Principals or equivalent to individual academies/schools		✓	✓		
Approval of staff structure of academy		✓			
Appointment of staff into new roles within the academy		✓			
Appointment of staff into a vacancy of an existing post (where delegation has previously been given to the Principal)			✓		
Setting of salary scales for all staff	✓				
Approval of pay rises and promotions within an individual academy/school for teaching/non-teaching staff (based on Principal recommendation)		✓			
Awarding pay rise of staff on Trust leadership contracts	✓				
Dismissal of member of staff through any policy including capability, attendance, disciplinary or probationary		✓	✓		

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– no award of severance or settlement agreement					
Dismissal of member of staff - award of any severance or settlement payment as a result of a proposed dismissal	✓				
Review of Trust staffing levels/structure annually			✓		
Conduct appraisals of Principals	✓ (with SIP)				
Conduct appraisals of Vice Principals or equivalent			✓ (with SIP)		
Conduct appraisals of all other staff			✓		
Authorisation of expenses for Principals or equivalent		✓ (Chair)			
Consultation with Trade Unions re; policy change			✓		
Authorisation of expenses for all other staff than Principals or equivalent			✓		
Appointment of a payroll provider for the Trust	✓				
Authorisation of holiday for Principals or equivalent		✓ (Chair)			
Authorisation of holiday for Vice Principals or equivalent			✓		

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Authorisation of leave of absence (excl P/VP's)			✓		
Approve changes to standing data held by the payroll provider			✓	✓	

**Education**

Ensure the Trust's academy achieves at least good outcomes and progress for all children and young people	✓	✓	✓		
Ensure the Trust and academy has all relevant statutory education policies in place	✓	✓	✓		
Ensure the academy/school has an appropriate and effective curriculum		✓	✓		
Ensure the academy/school has good or better teaching	✓	✓	✓		
Ensure the academy/school has appropriate and effective staffing	✓	✓	✓		
Make sure all children and young people are safeguarded in the academy.	✓	✓	✓		
Provide as required accurate reports on performance and progress in all Trust academies/schools.			✓		

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Provide as required accurate reports on individual academy performance and progress.			✓		
Provide an appropriate and effective self-evaluation of the academy to the BoD		✓	✓		
Provide an appropriate and effective school improvement plan for the academies to the BoD		✓	✓		
Approve the Trust development and improvement plan annually	✓				
Provide an appropriate and effective self-evaluation of the academy LGB			✓		
Provide an appropriate and effective development/school improvement plan for the academy to the LGB			✓		
Approval of academy improvement plan		✓			
Ensure all Directors and governors are appropriately trained in education and school improvement matters.			✓		
Ensure the academy is appropriately prepared for Ofsted inspection			✓		

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**Adopted by Bradford College Education Trust Board on .....**

**Chair of Bradford College Education Trust Board .....**

**Bradford College Education Trust Board Director .....**