

## Title

Discretionary Spend

## Associated Policies

- Whistleblowing (TPO/STA/19)

REVIEWED: OCTOBER 2018

NEXT REVIEW: OCTOBER 2021

**1. Introduction**

- 1.1 Senior Trust staff may spend non-public funds on non-mandatory items for particular events/occasions, within the agreed guidelines as set by the Trust. Any expenditure not directly linked to teaching and learning is classified as non-mandatory. Examples can be found in Appendix A. This policy is designed to monitor whilst limiting this expenditure.
- 1.2 Any non-mandatory spend will be funded through the Trust's Trading Company Income. Public money will not be used in any case to subsidise this.

**2. Who does this policy apply to?**

- 2.1 Senior Trust staff are responsible for monitoring expenditure for purchasing non-essential items as required. Alcohol is not permitted for purchase under any circumstances.
- 2.2 The Board of Directors will review the spend limits for such items annually. Non-mandatory spend will be overseen by the Director of Finance, and monitored by the Senior Finance/HR Manager and Principals within each of the individual schools.

**3. Who is responsible for carrying out and reviewing this policy?**

- 3.1 The implementation of this policy will be monitored by the Principals and Executive Leadership Team and remain under review by The Brooke Weston Trust (Finance & Resources Committee).

**4. What are the principles behind this policy?**

- 4.1 The appropriate level of such spend will not exceed the amount of Trading Company income.
- 4.2 Appendix A definitively lists the spend limits for the current year.
- 4.3 Authorisation will be sought via the normal purchase order form route from the Senior Finance/HR Manager, Executive Principal and Finance Director. Evidence (in the form of receipts) will be provided for the records.

**5. Review of the Policy**

- 5.1 The Trust will review this policy from time to time or on any occasion when it is requested to do so by the Board of Directors.

## Appendix A

### Guidelines on Non-Mandatory Spending Allowed

1st September 2015

Item	Value (£)		
	Trust	Secondary	Primary
<b>Annual</b>			
Christmas Cards - Staff	25	50	25
End of Term Recognition		250	100
<b>Per Event</b>			
Flowers for employee in hospital	35	35	35
Bereavement - spouse/child	35	35	35
Death in service	35	35	35
Leaving Gift - Principal	50		
Leaving Gift - Vice Principal/Deputy		50	50
Retirement Gift	100	100	100
Leaving Gift	20	20	20
Thank you gift	10	10	10