

Title

Discretionary Spend

Associated Policies

- Whistleblowing (TPO/STA/19)

REVIEWED: SEPTEMBER 2025

NEXT REVIEW: SEPTEMBER 2026

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 Lettings 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 Chief Financial Officer and monitored by the Finance Business Partners 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 (SDG) 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 lettings 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 Finance Business Partner and Principal. Evidence (in the form of receipts) will be provided for the records.

5. Review of the Policy

- 5.1 This policy will be monitored as part of the Trust's annual internal review and reviewed annually.

Document Control

Date of last review:	September 2025	Author:	CFO
Date of next review:	September 2026	Version:	5
Approved by:	Strategic Delivery Group	Status:	Non-Statutory

Summary of Changes

V5:

- Change in amounts to guidelines on non-mandatory spending allowed take into account inflation
- Policy to be reviewed annually.

Appendix A

Guidelines on Non-Mandatory Spending Allowed

1st September 2025

Per Event	Value £
Flowers**	50
Retirement Gift	100
Leaving Gift - Principal	100
Leaving Gift - Vice Principal/Deputy	75
Leaving Gift – more than 10 years' service	50
Leaving Gift – other employee	20

	GPS/TWA /Central £	CPA/OPS /PPS £	BPS £	CTS £	BWA/CBA /KSA/TCA £
Annual					
Christmas Cards/Gifts to Staff/Contribution to event	75	150	300	375	450

** to the following employees only:

- Parents on birth/adoption
- Death of parents/child/partner
- Hospital/long term sick (more than 4 weeks)
- to the close relatives in the case of death in service