

Operational Scheme of Delegation

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1 Purpose

The Operational Scheme of Delegation is derived from the Scheme of Reservation and Delegation incorporated within the Constitution, and sets out the **lowest level** that day to day operational decisions are delegated to or defines delegated limits where appropriate.

Order of delegation

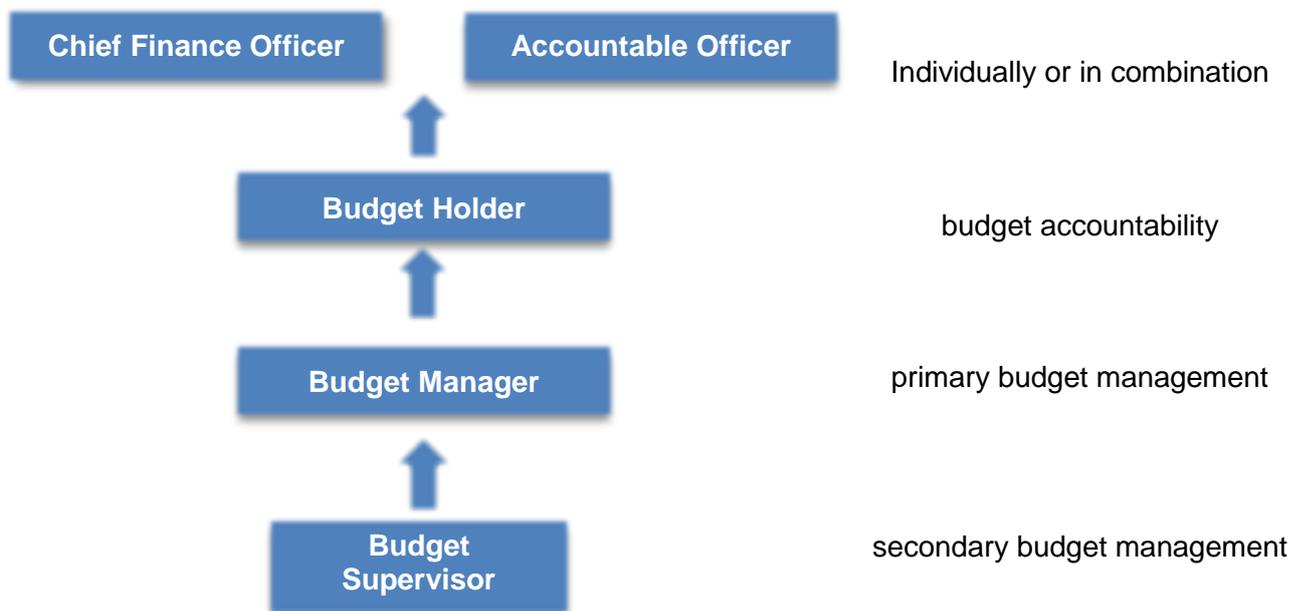
Maximum limits are stated within this document however delegation will follow limits set within the Oracle finance system user hierarchy.

All financial limits are subject to sufficient funds being available.

Deputising arrangements

Deputising arrangements are covered by reverting to the next level up in the structure hierarchy, rather than delegating further down the structure.

However in the case of the Accountable Officer, Chief Finance Officer and Budget Holders (Directors) the Accountable Officer can designate in writing for a fixed period a named individual to deputise, in full or in part.



Key associated documents

This document forms a key element of NHS Leeds Clinical Commissioning Group's (the "CCG") financial management and control environment and should be read in association with the following:

[Detailed Financial Policies](#)

[Budgetary Control Framework](#)

[Procurement Policy](#)

[Governance Handbook - Prime Financial Policies](#)

2 Key budgetary terms

Admin / Running Costs	<p>Expenditure on activities which are not deemed direct frontline healthcare service provision for example, but not limited to:</p> <ul style="list-style-type: none"> • employee costs • expenditure on accommodation, including rent, rates and maintenance; and • expenditure on comparable contracted-out services (including some consultancy costs) <p>Expenditure that does not fall within Admin budgets is known as Programme expenditure.</p>
Budget	<p>Specific sum of money allocated to carry out a specific plan within a given period of time. It expresses plans and intentions in resource and financial terms having regard for the quantity and quality of services to be given.</p> <p>Budgets prepared by Chief Finance Officer (CFO), on behalf of Accountable Officer (AO), at the start of each financial year allow performance and delivery to be managed and monitored.</p>
Budget Book	<p>The budget book presents the budgeted spending plans for the CCG's Admin and Programme activities as approved by the Governing Body; prepared on a cost centre basis for key Budget Holders and Budget Managers.</p>
Budget Holder	<p>In most circumstances the CCG's Budget Holders are the Executive Directors.</p> <p>Budgets are held by a single accountable person (a named Budget Holder as detailed in the Budget Book) who is responsible for running services or delivering specific objectives and is accountable for the associated spend.</p> <p>There can be several Budget Managers and Budget Supervisors who can carry out daily tasks on behalf of the Budget Holder but the Budget Holder remains accountable for the budget.</p> <p>The Budget Holder is responsible for the approval of individual financial limits delegated to named Budget Managers and Budget Supervisors (Oracle 'Authorised Signatory' approval). These approval limits may vary between teams.</p>
Budget Manager	<p>The management of a budget may be delegated to a named Budget Manager(s) by the Budget Holder (as detailed in the Budget Book). In general, escalation is to the Budget Holder.</p> <p>Budget Managers are primarily responsible for day to day expenditure of CCG funds, answerable to the Budget Holder for the way in which those funds have been used.</p>
Budget Supervisor	<p>Day to day management of a budget may be further delegated at a more granular level to a named Budget Supervisor(s). In general, this role is the lowest level of authority; escalation is to Budget Manager.</p>
Programme / Healthcare	<p>Expenditure relating to the provision of healthcare services which directly support frontline patient care.</p>
Virement	<p>Transfer of funds from an unspent or underspent budget to another; within virement rules to allow greater financial flexibility in using available resources.</p>

3 Budgetary Management and Control

Delegated matter	Detail	Authority delegated to
Responsibility for keeping expenditure within budget	Responsibility at individual budget level (pay, non pay and income)	Budget Holder/Budget Manager
	Accountability for totality of budget(s) under their control	Budget Holder
	Financial reserves and provisions	CFO
Approval new/changed Budget Holders	Approval of new Budget Holders or of change to existing Budget Holders	CFO or Deputy CFO
Virements (budget transfers)	By exception from: <ul style="list-style-type: none"> • pay to non-pay budgets • non-pay to pay budgets 	CFO or Deputy CFO CFO
	Within pay or non pay budgets Where transfers must be: <ul style="list-style-type: none"> • affordable within budget; and • agreed by both budget holders 	<ul style="list-style-type: none"> • ≤ £300k – Budget Holder • > £300k up to £1.5m - Deputy CFO • > Over £1.5m – CFO • Transfers from reserves – CFO

4 Investment and business cases

Amounts refer to lifetime contract expenditure, including any extensions.

Delegated matter	Detail	Authority delegated to
Commissioning Investment	New Investment - Financial decision making process (see Annex 1)	<ul style="list-style-type: none"> • ≤ £300k – Budget Holder • > £300k up to £1.5m – AO or CFO • > £1.5m – Governing Body or Primary Care Commissioning Committee (as appropriate)
Consultancy	Prior to expenditure being committed all 'business cases' must be appropriately approved	<ul style="list-style-type: none"> • ≤ £50k - Budget Holder in consultation with Finance Officer • > £50k - pro-forma business case authorised by CFO and AO; submitted to NHS England (england.consultancy@nhs.net) a <u>minimum of six weeks</u> in advance of proposed spend to allow for review and approval timescales

5 Procurement and contract award

Set out below are requirements in relation to the CCG's Procurement Policy and associated contract limits. Before requisitions and orders are placed for goods and services the following conditions and limits **must** be complied with.

*Requisitions/Orders that exceed 12 Month Period

The total value of requisitions that cover more than a 12 month period or that are open ended need to be considered as a total value, not just the cost for the 12 month period.

Delegated matter	Detail	Authority delegated to
Budget availability	Confirmation from Finance Officer that budgetary provision is available	Budget Manager
Threshold decision to obtain competitive tenders	<p>Procurement Thresholds</p> <p>For orders in excess of the limits defined below, formal competitive tendering will normally apply except in certain circumstances outlined in the Procurement Policy</p> <p>Thresholds apply to the lifetime value of an order/contract and <u>include</u> VAT:</p> <ul style="list-style-type: none"> • £663,540 Healthcare Services; and • £189,330 Non Healthcare Services 	<p>Decision to obtain tenders</p> <p>Healthcare Services</p> <ul style="list-style-type: none"> • < £663,539 – see below • ≥ £663,540 up to £1.5m – Budget Manager and Associate Director of Contracting & Procurement • > £1.5m – Governing Body or Primary Care Commissioning Committee (as appropriate) <p>Non Healthcare Services</p> <ul style="list-style-type: none"> • < £189,329 – see below • ≥ £189,330 up to £1.5m – Budget Manager and Associate Director of Contracting & Procurement • > £1.5m – Governing Body or Primary Care Commissioning Committee (as appropriate) <p>Commitment of any expenditure must be in line with contract approval delegated limits stated below</p> <p>All contracts awarded following the competitive tender process must be reported to the next Audit Committee for assurance on the Register of Procurement Decisions</p>
Sub threshold decision to obtain quotations and procurement requirements	<p>Where formal competitive tendering is not required e.g. below threshold limits, quotations must be obtained and <u>documentary evidence retained by Budget Managers</u> of the following:</p> <p>Healthcare Contracts (as defined by Schedule 3 of the Public Contracts Regulations 2015)</p> <p>Below £663,540* including VAT</p> <ul style="list-style-type: none"> • ≤ £10,000 - no quotations required • > £10,000 up to £100,000 - minimum 	<p>Decision to obtain quotations</p> <p>Commitment of any expenditure must be in line with contract approval delegated limits stated below</p> <p>Budget Manager</p>

Delegated matter	Detail	Authority delegated to
	<p>of 2 written quotations; <ul style="list-style-type: none"> • > £100,000 and £663,539 - minimum of 3 written quotations <p>Non Healthcare Contracts</p> <p>Below £189,330*, including VAT</p> <ul style="list-style-type: none"> • ≤ £10,000 - no quotations required • > £10,000 up to £100,000 - minimum of 2 written quotations • > £100,000 up to £189,329 - minimum of 3 written quotations </p>	Budget Manager
Waiver of Procurement Policy	By exception , permission to waive the requirements to obtain competitive quotations and tenders in line with the Procurement Policy	<p>Healthcare Services</p> <ul style="list-style-type: none"> • < £663,539 – Associate Director of Contracting & Procurement • ≥ £663,540 - AO and CFO <p>Non Healthcare Services</p> <ul style="list-style-type: none"> • < £189,329 – Associate Director of Contracting & Procurement • ≥ £189,330 - AO and CFO <p>Where (rarely) it is not possible to mitigate all procurement risk or financial risk, the final decision and associated sign off, rests with the Accountable Officer</p> <p>All waivers must be reported to the next Audit Committee meeting for assurance</p>
Contract approval – new and variations	<p>Healthcare (Programme) – New contract and contract variation approvals</p> <p>Running Costs (Admin) - New contract and contract variation approvals</p>	<ul style="list-style-type: none"> • ≤ £300k – Budget Holder • > £300k up to £1m - Budget Holder and Associate Director of Contracting & Procurement • > £1m up to £1.5m – AO or CFO • > £1.5m – Governing Body or Primary Care Commissioning Committee (as appropriate) <ul style="list-style-type: none"> • ≤ £300k – CFO • > £300k up to £1.5m – AO and CFO • > £1.5m – CCG Governing Body or Primary Care Commissioning Committee (as appropriate)
Contract approval – renewal	Healthcare (Programme) - Annual renewal of existing healthcare contracts	<ul style="list-style-type: none"> • ≤ £1.5m – Budget Holder and Associate Director of Contracting & Procurement • > £1.5m – AO or CFO

Delegated matter	Detail	Authority delegated to
Individual care packages & funding requests	Approval of Individual Care Packages (health element only) including, but not limited to: <ul style="list-style-type: none"> • CHC • Section 117 aftercare • Learning Disability and Mental Health packages • Transforming Care 	Packages costing: <ul style="list-style-type: none"> • ≤ £1.5k/week – Clinical Leads or Care Coordinators • > £1.5k up to £2.5k/week – Clinical Service Manager or Business Manager • > £2.5k up to £10k/week – Head of Service / Commissioning Lead • > £10k up to £15k/week – Budget Holder • > £15k/week - AO
	Approval of Individual Funding Requests (IFR), including but not limited to: <ul style="list-style-type: none"> • Non-commissioned activity • Cosmetic procedures • High cost drugs 	<ul style="list-style-type: none"> • ≤ £100k in totality – IFR Designated Decision Maker (senior clinician and member of the CCG's Medical Directorate) • > £100k in totality - additional approval by AO and Clinical Chair; report to Governing Body
Local primary care schemes	Agreement of new local primary care: <ul style="list-style-type: none"> • enhanced services • incentive schemes • other 	<ul style="list-style-type: none"> • ≤ £750k in scheme totality (individual practice: ≤ £25k) – AO and CFO • > £750k in scheme totality (individual practice: > £25k) – Primary Care Commissioning Committee (PCCC)

6 Approval and payment invoices

Unless otherwise stated, all delegated authority referred to below is subject to individual delegated Oracle financial limits.

Delegated matter	Detail	Authority delegated to
Programme (healthcare)	Healthcare Contract Payments (as defined within the Contract payment schedule)	Budget Supervisor or Finance Officer
	Other payments outside contractually agreed payment schedules, including but not limited to: <ul style="list-style-type: none"> • CQUIN payments • Approved Individual Funding Request (IFR) payments • Care packages or additional care package requirements, e.g. observations • Contract reconciliation adjustments • Payments where no expected annual contract value has been agreed, e.g. Any Qualified Provider (AQP) payments 	Budget Supervisor
	Non-Contractual Activity (NCA) Payments	Budget Supervisor or Finance Officer, following validation
	Continuing Healthcare (CHC) Payments	<ul style="list-style-type: none"> • ≤ £75k - CHC Finance in line with delegated limits

Delegated matter	Detail	Authority delegated to
		<ul style="list-style-type: none"> • > £75k up to £130k – Clinical Services Manager / Business manager • > £130k up to £250k – Head of Service / Commissioning Lead • > £250k up to £350k – Budget Holder • > £350k – AO
	Mental Health Act Section 12 Assessment Fees	Budget Supervisor
	NHS Treatment Travel Expenses HC5(T) validated by Business Services Authority	Budget Supervisor
Admin (running costs)	Approval of invoices / payments / raising of purchase orders	<ul style="list-style-type: none"> • ≤ £10k – Budget Supervisor • > £10k up to £100k – Budget Manager • > £100k up to £750k – Budget Holder • > £750k up to £1.5m – CFO <u>or</u> AO • > £1.5m – CFO <u>and</u> AO

7 Income

Delegated matter	Detail	Authority delegated to
Fees and Charges (income generation)	Review and approval of income generating fees and charges	CFO
Sales invoices and credit notes	Request to raise sales invoice (order) and credit note (memo)	<ul style="list-style-type: none"> • ≤ £50k - Budget Supervisor or Finance Officer • > £50k up to £100k - Budget Manager • > £100k up to £250k – Budget Holder <u>or</u> Deputy CFO • > £250k – CFO
Debt recovery	<p>Appointment of professional debt recovery agency and/or courts to recover an outstanding debt or overpayment</p> <p>Income not received should be dealt with in accordance with the losses procedures</p>	Deputy CFO

8 Collaborative and partnership working

Delegated matter	Detail	Authority delegated to
Memorandum of Understanding (MOU)	Agreement approval	AO <u>or</u> relevant Budget Holder

9 Capital

Delegated matter	Detail	Authority delegated to
Capital	Estates	CFO <u>or</u> AO
Right of use assets	Right of Use Assets: financial monitoring and reporting on all capital scheme expenditure	Deputy CFO
Purchase of internal fixtures and fittings	Approval of requisitions by exception	Deputy CFO

10 Agreements, licences and insurance policies

Delegated matter	Detail	Authority delegated to
Agreements and licenses	New and renewals: <ul style="list-style-type: none"> • Tenancy agreements • Licences for all staff subject to CCG Policy on accommodation for staff • Operating leases • Indemnity agreements • Service Level Agreements 	CFO <u>or</u> AO
	Extensions to existing leases	CFO
	Letting of premises to outside organisations	CFO
	Approval of rent based on professional assessment	CFO
Vehicle insurance	Approval commercial arrangements: <ul style="list-style-type: none"> • New • Renewal 	AO <u>or</u> CFO Deputy CFO

11 Maintenance and operation of bank accounts

Delegated matter	Detail	Authority delegated to
Day to day bank administration	Day to day operation of organisational bank accounts	Senior Assistant Finance Manager (Corporate Finance) in conjunction with Shared Business Services representative
Cash drawdown	Authorisation for cash drawdown	Senior Assistant Finance Manager (Corporate finance)
Petty cash	Staff reimbursement of expenses are via payroll unless by exception	≤ £75 by exception - Budget Supervisor

12 Disposal, special payments, losses and compensation

Delegated matter	Detail	Authority delegated to
Condemning and disposal	<p>Items obsolete, obsolescent, redundant, irreparable or cannot be repaired cost effectively (including IT equipment)</p> <ul style="list-style-type: none"> with current / estimated purchase price disposal of equipment 	<ul style="list-style-type: none"> ≤ £50 per item - Budget Holder ≤ £1,000/sale estimated income - Deputy CFO > £1,000/sale estimated income – CFO
Special payments	<p>Special Payments relating to the following:</p> <ul style="list-style-type: none"> compensation payments extra-contractual or ex gratia payments extra-statutory and extra-regulatory payments (any payments made without specific identifiable legal power) <p>Special Severance Payments (payments to employees, contractors and others outside of normal statutory or contractual requirements when leaving employment in public service whether they resign, are dismissed or reach an agreed termination of contract)</p> <p>Novel, Contentious or potentially Repercussive Special Payments</p>	<p>CFO</p> <p>All Severance Payments must be approved by:</p> <ul style="list-style-type: none"> Governing Body, upon Remuneration and Nomination Committee recommendation; and then HM Treasury <p>HM Treasury must be consulted in advance irrespective of delegated authority or amount concerned</p> <p>All Special Payments must be reported to the next Audit Committee meeting for assurance</p>

Delegated matter	Detail	Authority delegated to
Losses and write offs	<p>Including but not limited to examples below, as defined in Managing Public Money:</p> <ul style="list-style-type: none"> • Losses of cash, pay losses, overpayments • Losses through theft, fraud, arson or other deliberate act • Fruitless payments • Bad debts write offs and claims abandoned <p>Novel, Contentious or potentially Repercussive Losses</p>	<ul style="list-style-type: none"> • ≤ £150k – AO or CFO • > £150k – Governing Body <p>HM Treasury <u>must be consulted in advance</u> irrespective of delegated authority or amount concerned</p> <p>All losses <u>must</u> be reported to the next Audit Committee meeting for assurance</p>
Continuing healthcare claims	Retrospective Continuing Healthcare Claims	<ul style="list-style-type: none"> • ≤ £50k – Head of Service / Commissioning Lead • > £50k – Budget Holder

13 Establishment and pay

Delegated matter	Detail	Authority delegated to
Establishments	<p>Workforce/establishment</p> <p>Engagement, re-engagement or re-grading of employees, either on a permanent or temporary nature, or changes in any aspect of remuneration must be in accordance with the Establishment / Engagement Control Framework (ECF)</p>	<p>Establishment delegated authorised signatory as required by Establishment / Engagement Control Framework:</p> <ul style="list-style-type: none"> • Budget Holder or • Budget Manager
Pay	<p>Authority to:</p> <ul style="list-style-type: none"> • approve business cases for counting previous equivalent service outside the NHS for incremental credit on commencement • complete standing data forms effecting pay: <ul style="list-style-type: none"> ○ instruction to appoint ○ variation to contract ○ notification of leaver • authorise overtime 	<p>Budget Holder (recommendation to be made by expert advisory panel)</p> <p>Budget Manager Budget Manager Line Manager, as recorded in ESR (Electronic Staff Record)</p> <p>By exception Budget Manager</p>
	<p>Salary agreement/change - not covered by AfC/National terms and conditions</p>	<p>By exception Remuneration and Nomination Committee</p>
Salary payovers	<p>Payment authority for, but not limited to, tax, NI, pensions, salary sacrifice scheme invoice</p>	<p>Senior Assistant Finance Manager (Corporate Finance)</p>
Car and bicycle schemes	<p>Authority to approve:</p> <ul style="list-style-type: none"> • business lease cars (essential car users) • salary sacrifice cars • cycle to work 	<p>Budget Manager</p>
Removal expenses, excess rent and house purchases	<p>Authorisation of payment of removal expenses incurred by officers taking up new appointments (providing consideration was promised at interview)</p>	<ul style="list-style-type: none"> • ≤ £7,000 - Budget Holder and CFO • > £7,000 - Budget Holder and AO

14 Primary care co-commissioning

Under the NHS England delegation agreement dual delegated authority with NHS England is required for the matters referred to below.

Delegated matter	CCG Delegated Officer	NHS England approval officer
Taking any step or action in relation to the settlement of a Claim, where the value of the settlement exceeds £100,000	CCG AO <u>or</u> CFO	<ul style="list-style-type: none"> • NHS England Head of Legal Services; and • Local NHS England Team Director or Director of Finance
Any matter in relation to the Delegated Functions which is novel, contentious or repercussive	CCG AO <u>or</u> CFO	<ul style="list-style-type: none"> • Local NHS England Team Director or Director of Finance <u>or</u> • NHS England Region Director or Director of Finance <u>or</u> • NHS England Chief Executive or Chief Financial Officer
The entering into of any Primary Medical Services Contract which has or is capable of having a term which exceeds five (5) years	CCG AO <u>or</u> CFO	Local NHS England Team Director or Director of Finance

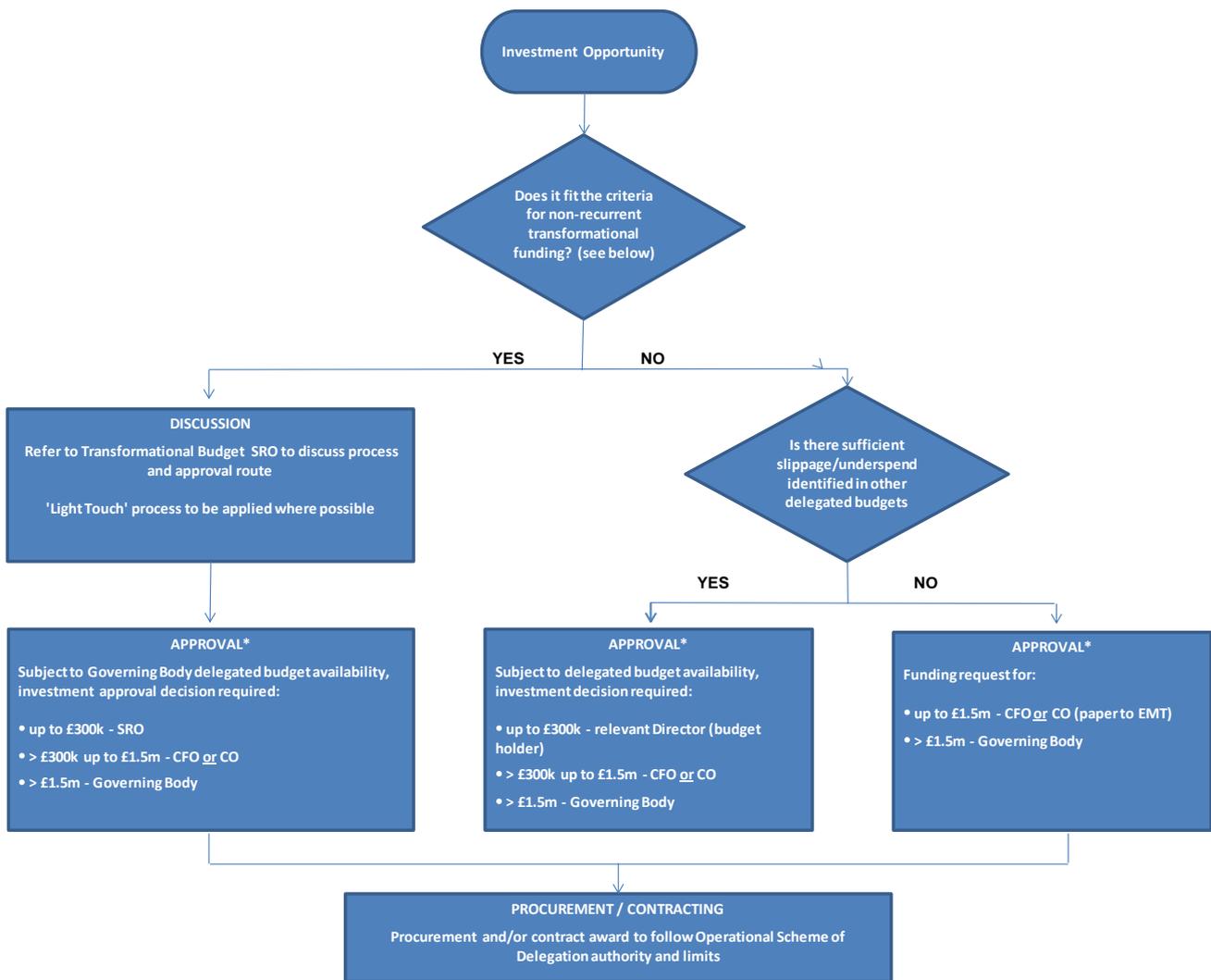
15 Glossary

The glossary below is included to aid understanding of the Operational Scheme of Delegation.

Accountable Officer (AO)	The person responsible and accountable for resources within the control of NHS Leeds CCG. The Accountable Officer for NHS Leeds CCG is the Chief Executive.
Agenda for Change (AfC)	Agenda for Change is the national pay system for all NHS staff, with the exception of doctors, dentists and most senior managers. The NHS Terms and Conditions of Service Handbook contains the national agreements on pay and conditions of service for NHS staff under the NHS Terms and Conditions of Service (Agenda for Change).
Any Qualified Provider (AQP)	When patients are referred, usually by their GP, for a particular service, they should be able to choose from a list of qualified providers who meet NHS service quality requirements, prices and normal contractual obligations.
Consultancy	Consultancy is defined by HM Treasury as: <i>The provision of management, objective advice and assistance relating to strategy, structure, management or operations of an organisation in pursuit of its purposes and objectives. Such assistance will be provided outside the business as usual environment when in house skills are not available and will usually be time-limited. Services will include the identification of options with recommendations and/or assistance with (but not delivery of) the implementation of solutions.</i>
Chief Finance Officer (CFO)	A qualified accountant employed by the CCG with responsibility for financial strategy, management and governance and who is a member of the Governing Body.
Governing Body	The body appointed under section 14L of the NHS Act 2006, with the main function of ensuring that the CCG has made appropriate arrangements for ensuring that it complies with its obligations under section 14Q under the NHS Act 2006, and such generally accepted principles of good governance as are relevant to it.
Individual Funding Requests (IFR)	Funding process for situations where proposed treatment/drugs are new, not in existing contracts, and expensive or rare.
Non-Contract Activity (NCA)	Defined in the NHS 'Who Pays' guidance: 'Non-contract activity (NCA) is the term used to refer to NHS-funded services delivered to a patient by a provider which does not have a written contract with that patient's responsible commissioner, but which does have a written contract with another commissioner or commissioners'
Section 75 (S75) Partnership Agreements	Section 75 of the NHS Act 2006 sets out a number of powers that support partnership and joint commissioning across health and social care. Key provisions of the act allow NHS Bodies and Local authorities to establish pooled budgets, and also allow for the delegation of certain statutory functions from one partner to the other through a lead commissioning arrangement.
Section 117	Entitlement to hospital after-care under section 3, 37, 45A, 47 or 48 of the Mental Health Act 1983.
Section 256 (S256) Agreements	S256 Agreements were established through the NHS Act 2006 and allow NHS commissioners to make payments to Local authorities towards any Local Authority expenditure which in the opinion of the CCG would have an effect on the health of individuals, or which would have an impact on, or be affected by, NHS commissioned services, or are otherwise connected with other NHS functions.

Quotation	Statement of estimated cost of good or service. This can be provided in any format.
Tender	Written presentation (in prescribed format) against which suppliers are evaluated in order to identify the preferred supplier(s).

Annex 1 New Investment - Financial decision making process



*All limits apply to value over the life of the scheme

Criteria for Non Recurrent Transformational Funding

The transformation fund will apply to a relatively narrow, small number, big ticket areas of development without a lengthy or complicated bidding process.

Funds will be applied to areas where developments are significantly advanced, for example:

- Progressing the implementation of the population health management initiatives
- Leeds System Development enablers – investments in technology, (digital) infrastructure, system-wide interoperability and Business Intelligence
- Implementation of recommendations from system wide reviews
- Other Local Leeds system

Transformation SRO: Director of System Integration