



Delegation Framework

A delegations framework document for a board of trustees typically outlines the authority and responsibilities delegated to various roles within the organisation. Here's an example of what such a document might contain for conducting a performance review:

Setting a Review Schedule – Establish a regular schedule for performance reviews, perhaps quarterly or bi-annually. Mark these dates on your calendar to ensure they don't slip through the cracks.

Assigning Responsibilities – Involve your HR team and managers by assigning specific individuals to lead the performance review process.

Conducting the Review – When it's time for the reviews, take a comprehensive look at each employee's performance. Assess their achievements, areas for improvement, and gather input from peers and supervisors.

Benchmarking Against Industry Standards – Compare your performance metrics with industry standards. This helps ensure that your evaluation criteria are competitive and aligned with best practices, which can enhance employee engagement and retention.

Implementing Changes – If you identify areas for improvement in the review process, make the necessary adjustments. Ensure that any changes are approved by relevant stakeholders before implementing them.

Communicating Updates – After the reviews, communicate the outcomes clearly to each employee. Consider holding one-on-one meetings to discuss feedback and set goals for the next review period, ensuring everyone is aligned.

Monitoring Effectiveness – Keep track of how well the performance review process is working. Set metrics to evaluate its effectiveness, such as employee satisfaction and performance improvement.

Documenting Everything – Finally, document all aspects of the performance review process, including feedback and action plans. This will help maintain transparency and accountability, and provide a reference for future reviews.

Example of a Delegation Table

Role/Committee	Authority	Limitations
Board of Trustees	Approve annual budget	Cannot delegate legal responsibilities
Finance Committee	Review financial reports	Cannot approve budget changes
Executive Team	Manage daily operations	Must report significant changes to the board
CEO	Sign contracts up to £50,000	Must seek board approval for larger contracts

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