



The Robert Carre Trust

Members, Trustees, Governors and Staff Allowances Policy

Introduction

The Trust believes that reimbursing expenditure incurred by Members, Trustees, Governors, committee members and staff in the performance of their duties is important in ensuring equality of opportunity for all members of the community, and that this is an appropriate use of funds. Claims will be paid from the school's delegated budget.

Principles

No Member, Trustee, Governor or member of staff should be out of pocket for expenses incurred during the course of their duties.

All Members, Trustees, Governors, any non-governor members of committees established by the Members, Trust or Local Governing Body, and members of staff will be treated equally.

There is no provision in this policy for Members, Trustees, Governors or non-governor members of committees to claim for loss of earnings or an attendance allowance.

Individual expenses will be kept confidential, but expenses forms will be required to be completed for audit purposes.

Eligible Expenses

The following are eligible expenses for people listed above , where appropriate:

- child care or baby-sitting expenses;
- care for an elderly or dependent relative;
- telephone charges, photocopying, stationery etc;
- travel and subsistence, i.e., meals purchased that would not otherwise have been bought.

Care costs

Care costs will not be met under this policy where the care for a child or dependent relative is being provided by an existing or former spouse or partner, or by a responsible person who normally lives in the family home.

Care costs are specifically for occasions outside of normal working hours only.

Claims for payments must be supported by the submission of a receipt/invoice.

Telephone Charges and Stationery

Reasonable expenses will be met for telephone calls made on behalf of the Trust and stationery used for Trust business.

Photocopying should be done at the school, where possible.

Claims for payments must be supported by the submission of a receipt, or in the case of a telephone claim, the relevant bill.

Travelling Expenses

Travelling expenses reasonably incurred by people listed above travelling on authorised school business shall be reimbursed by the Academy and shall be calculated by reference to the main place of employment. Travelling expenses shall not be payable in respect of normal journeys between the home and normal place of business.

Where a people listed above, with the approval of the employer undertakes voluntarily extra-curricular activities, they shall receive reimbursement of travelling expenses in accordance with these provisions.

Those eligible shall not be required to use their personal cars in the service of the Academy, but where they agree to do so the Academy shall pay an allowance in accordance with the provisions set out below.

Those eligible who do not have the use of a car and who have to travel in the course of work will have the costs of public transport reimbursed. Reimbursement will normally be based on the most economic travel option, which will normally be second class travel on a train.

Those eligible claiming travelling expenses are required to complete the claims form attached as appendices to this policy. An electronic version of the form is located in the staff only section of the school intranet and hard copies are available from the school office.

When undertaking a journey for which payment is made, those eligible may be required to transport in the car, without additional payment, equipment or passengers concerned in the purpose of the journey.

Those eligible claiming travelling expenses must hold a valid driving licence and certificate of motor insurance which includes provision for use of the car for business.

Travel Rates

The Trust has adopted the current rates for travel:

- Car mileage @ the current HMRC rate
- Public transport costs at lowest economic rate

Claims are to be submitted as soon as practicable after completion of the journey but certainly within the calendar month during which the journey occurred.

Subsistence Allowances

Subsistence expenses reasonably incurred by a Member, Trustee or Governor or member of staff in the course of authorised travel on Trust business shall be reimbursed by the authority as detailed below.

Where a teacher, with the approval of the employer, voluntarily undertakes extra-curricular activities, the teacher shall receive reimbursement of subsistence expenses as detailed below.

Payment of subsistence allowances is subject to the condition that expenditure for which the allowances are claimed has actually been incurred. Claims for payments must be supported by the submission of a receipt. Where the receipted amount is less than the allowance, the actual amount will be paid.

An allowance shall not be paid where an authority provides a suitable meal. Where a teacher is able to have meals in a local authority establishment, only the actual expenditure shall be reimbursed.

In the case of an absence from the usual place of work, reasonable expenses will be reimbursed on production of receipts.

Staff should seek clarity about 'reasonable' before travelling.

Those eligible must submit their claims at the earliest practical point after the expenditure has been incurred.

Process

- Those eligible must complete a claim form and provide receipts, and/or other evidence of expenditure, wherever possible.
- Members', Trustees' and Governors' claims will be authorised by the Chairman of the Finance, Resources and Audit Committee
- Any claims by the Chairman of the RCT Board will be authorised by the Vice-Chairman of the RCT board
- The Executive Headteacher's claims will be authorised by the Chairman, or in his absence, the Vice-Chairman of the RCT Board
- The Head of School's claims will be authorised by the Executive Headteacher
- Staff claims will be authorised by the appropriate Headteacher/ Head of School
- Payments, once authorised will be made via BACS

Appendix

A Travelling and other Expenses Claim Form

Reviewed at the meeting of the Finance, Resources and Audit Committee on 4 February 2020

Ratified at the meeting of the Board on 26 February 2020

Next Review Date: March 2024 (4 years)



The Robert Carre Trust

DOCUMENT NUMBER:
FINANCE USE ONLY

TRAVEL AND GENERAL EXPENSES CLAIM FORM

CLAIMED BY: Surname and Initials:	
Private Address:	

Travel Expenses

Date of Travel dd/mm/yyyy	Purpose of Journey	Travelling From	Travelling To	Mileage	Rate	Total
					£0.45	£0.00
					£0.45	£0.00
					£0.45	£0.00
					£0.45	£0.00
					£0.45	£0.00
Travel Expenses Sub Total						£0.00

Other Expenses: PLEASE ATTACH RECEIPTS

Date dd/mm/yyyy	Specify Expense	Net Price	VAT	Total
			£0.00	£0.00
			£0.00	£0.00
			£0.00	£0.00
Other Expenses Sub Total				£0.00
Total of Travel Expenses & Other Expenses				£0.00

CLAIMANT'S CERTIFICATE

The particulars stated are correct, the mileages claimed are for journeys over the shortest practicable routes and the allowances claimed are in accordance with the school regulations.

Claimant's Signature:	
Approved Headteacher's Signature:	

FINANCE OFFICE USE ONLY

Date	Nominal Code	Cost Centre		Total
				£0.00
Department Budget:		Certified for Payment:	JG/AN	