

Trustee and
Governor
Allowances
March 2023



**ORCHARD ACADEMY
TRUST**

Orchard Academy Trust believes that paying trustees' and governors' allowances, in specific categories as set out below, is important in ensuring equality of opportunity to serve as trustees and governors for all members of the community and so is an appropriate use of school funds. The specific items allowable reflect this objective.

By adopting this policy, we will ensure that no member of the community is prevented from becoming a governor or trustee on the grounds of cost.

All trustees and governors will be entitled to claim the actual costs, which they incur as follows:

1. Trustees and Governors will be able to claim allowances providing the allowances are incurred in carrying out their duties, as a Trustee or Governor or representative of the Trust or schools, and are agreed by the Trust or Governing body that they are justified before any reimbursable costs are incurred.
2. Trustees and Governors will be able to claim for the following, on a case-by-case basis and will be authorised by the Chair of Trust/Chair of Governors (or Vice-Chair in the case of a claim by the Chair):
 - Childcare or baby sitting allowances (excluding payments to a current/former spouse or partner);
 - Cost of care arrangements for an elderly or dependent relative (excluding payments to a current/former spouse or partner);
 - The extra costs they incur in performing their duties because they have a special need or English as a second language.
 - The cost of travel relating only to travel to meetings/training courses at a rate of 45 pence per mile which does not exceed the specified rates for school personnel;
 - Travel and subsistence costs.
 - Telephone charges, photocopying, stationery, postage etc;
 - Any other justifiable allowances.

The Trust and Governing Body at each school acknowledges that:

- Trustees and Governors may not be paid attendance allowance;
- Trustees and Governors may not be reimbursed for loss of earnings.

Allowances will only be paid on the provision of a receipt, and will be limited to the amount shown on the receipt.

Members of the Trust board/Governing body may claim allowances by completing a claim form (see appendix 1) and submitting it to the Finance Assistant in the school office within two weeks of the date when allowances incurred, when they will be submitted for approval by the Headteacher or Executive Head for final approval.

Claims will be subject to independent audit and may be investigated by the Chair of Trust or Governors (or Vice Chair in respect of the Chair of Governors) if they appear excessive or inconsistent.

The Chair of Trust / Chair of Governors (or the vice-chair, where appropriate) may investigate claims that appear excessive or inconsistent. All claims will be subject to an independent audit.

Appendix 1: Trustee/governor claim form

School or Trustee _____

Trustee / Governor claim form

Name:

Address:

Claim period:

I claim the total sum of £_____ for trustee / governor expenses as detailed below. I have attached relevant receipts to support my claim.

Signed: _____

Date: _____

EXPENSE TYPE	£
Childcare	
Care arrangements for dependent relatives	
Support for a special need or English as a second language	
Travel or subsistence	
Telephone charges, photocopying, postage or stationery	
Other (please specify)	
Total expenses claimed	

This form should be submitted to the Finance Assistant in the School office along with any relevant receipts.

The form should be submitted within [2 weeks] of the expenses being incurred.

Policy issued: March 2023

Date of Review: March 2024