


Trustee Expenses Policy


The trust is a registered charity and will need to ensure that any payments made to the Trustees comply with the Charity Commission guidance.

This policy statement relates only to the payment of expenses. Expenses are normally the refund by the charity of the costs a trustee has met personally in order to carry out Trustee duties, although these expenses may be paid in advance. Whilst the concept of unpaid Trusteeship is one of the defining characteristics of charitable status, trustees are entitled to have their expenses met from the funds of the charity.

This policy does not address paying Trustee for the provision of services over and above the normal Trustee duties, for which other guidance is available, nor does it address the employment of a trustee.

From April 2014, all Trustees of The Education Fellowship Trust will be entitled to claim the actual costs, which they incur as follows:

-  Trustees will be able to claim reasonable expenses provided the expenses are incurred in carrying out their duties as a Trustee of The Trust. All expenses over £15 needs the prior approval of either the CEO.

-  Trustees will be able to claim for the following:
 - The reasonable cost of childcare or babysitting (excluding payments to a current/former spouse or partner)
 - The reasonable cost of care arrangements for an elderly or dependent relative (excluding payments to a current/former spouse or partner)
 - Communication support cost, incurred in performing their duties either because they have special needs or because English is not their first language.
 - The reasonable cost of travel relating only to travel to meetings and training courses to the level permitted by HM Revenue and Custom (HMRC) before tax becomes payable.
 - Current HMRC Mileage Rate 45p per mile
 - The reasonable cost of meals taken whilst on Academy business:
 - Evening Meal £15 (no alcohol)

- The reasonable cost of overnight accommodation whilst attending national meeting or training events.
Accommodation cost £100 per night including breakfast
- Telephone charges, photocopying, stationery, postage etc;
- Printing at the rate of 5p per sheet
- Any other reasonable expenses incurred on Trustee or Governor Business

The Education Fellowship has determined that:

- Trustees will not be paid attendance allowance
- Trustees will not be reimbursed for loss of earnings
- Trustees will not be reimbursed for expenses that are excessive and/or that do not relate to legitimate trustee or governor business.

Trustees wishing to make claims under these arrangements should complete a claim form (obtained from the Principal Finance Officer), attaching appropriate receipts, and return within one month of the date when the expenses were incurred, when they will be submitted for approval by the CEO.

Claims will be subjected to independent audit and may be investigated by the external auditors.

This policy shall be subject to yearly review.

Claim form for Trustees

Name:	
Address:	Date:
Post Code:	Claim Period:

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

Signed:.....

CAR DETAILS

Make & Model..... Precise CC.....Reg No.....

Date	From	To	Purpose of Journey	Miles	£	p

	£	p
Child care/Babysitting expenses		
Care arrangements for an elderly or dependent relative		
Communication Support		
Meals		
Telephone Charges		
Postage		
Photocopying		
Printing		
Stationery		
Other (place specify)		
TOTAL EXPENSES CLAIMED		

Checked and authorisedDate

Bank Account Details:

Account Name.....

Sort Code.....Account Number.....