

Greenshaw Learning Trust

Expenses Policy

Approved by the Board of Trustees 6 September 2017

1. The Trust can reimburse Trustees, non-trustee members of Trust committees, local governors and non-governor members of local governing body committees for reasonable and necessary costs incurred in order to carry out their duties.
2. All members of the Board of Trustees and its committees and local governing bodies will be treated equally.
3. Herein, reference to 'Trustee/governor' includes non-trustee members of committees, local governors and non-governor members of local governing body committees.
4. Reference to 'the Clerk' means Clerk to the Trust with respect to Trustees and non-Trustee members of Trust committees, and Clerk to the local governing body for local governors and non-governor members of local governing bodies.
5. Expenses will only be paid where the amount claimed has actually been spent by the claimant.
6. Expense claims must be submitted to the Clerk, on a claims form, within 6 months of the expense being incurred.
7. Expense claims should normally be supported by bills or receipts, except where it is impractical to do so, for example where the amount claimed is very small.
8. Individual expense claims will be kept confidential, but expenses forms will be required to be completed for audit purposes.
9. Expenses may be paid in advance where not to do so would impair the Trustee's / governor's ability to carry out their duties; any payment above the amount actually incurred must be returned.
10. The following are examples of eligible expenses that may be claimed:
 - Travel costs, public transport, taxi fares.
 - Childcare or care for other dependents whilst on governing body business.
 - Costs incurred to enable the carrying out of Trustee business due to the Trustee's special needs such as disability or language (e.g. translation, Braille).
 - The costs of training materials and publications.
 - Reasonable overnight accommodation and subsistence whilst attending approved events such as conferences or specialist training courses.
11. Expenses will not be paid for overseas travel or loss of earnings.
12. 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.
13. The Clerk will maintain a record of expenses claims submitted; Individual expense claims will be kept confidential, but expenses forms will be required to be completed for audit purposes.
14. Trustees' / governors' expenses are not subject to tax as long as only actual expenditure is reimbursed.
15. Costs of purchases properly made on behalf of the Trust are not counted as expenses and should be approved and accounted through the Trust's general expenditure.
16. If you have any doubt about what constitutes a valid expense, you should discuss the matter in advance with the Clerk. If necessary, the Clerk should seek, and should take, the advice of the School Business manager or Trust Director of Resources.
17. Where the Trust has approved a specific expenses policy for a governing body, governor and non-governor members of that governing body may claim expenses only under that policy.