



LIFE Education Trust

Learning Is For Everyone

Our Aim is that every School will be:

- An efficient school
- An effective School
- An enriching school
- An enabling school

ALLOWANCES POLICY for MEMBERS, DIRECTORS AND LOCAL GOVERNING BODIES

Policy	Members, Directors and LGB Allowances
Policy adopted by Trust Board	14 th March 2017
Reported to LGBs for implementation	15 th March 2017
Implementation Date	15 th March 2017
Review Date	March 2019
Policy Source	NGA Model Policy

KEY DEFINITIONS USED IN THIS POLICY:

The Trust	LIFE Education Trust
The Board/Directors/Trust Board	The Board of Directors of LIFE Education Trust
School/Trust school	An Academy or school within LIFE Education Trust
Staff	All staff employed by LIFE Education Trust and working with academies, schools or units within LIFE Education Trust

All schools within the LIFE Education Trust are legally defined as academies, regardless of whether the term “school” is used to describe them in the following policy.

Introduction

This policy statement has been developed in accordance with the DfE document “*The School Governance (Roles, Procedures and Allowances) (England) Regulations 2013*”. These regulations give the Directors of the Trust and their Local Governing Bodies the discretion to pay allowances from the Academy’s delegated budget allocation to governors for certain expenses which they incur whilst carrying out their duties.

Claimants will not be liable for tax on allowances paid providing that only actual expenditure is reimbursed

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

LIFE Education Trust delegate authority to the Headteacher or the Business & Development Manager for the day to day implementation of the policy and approval of expenditure within the budget set.

All Members, Directors of the Trust and members of Local Governing bodies or Committees of LIFE Education Trust will be entitled to claim the actual costs, which they incur as follows:

1. Allowances may be claimed providing the allowances are incurred in carrying out their duties, as defined above or representative of a school within the Trust and are agreed by the Headteacher or the Business & Development Manager that they are justified before any reimbursable costs are incurred.
2. Claims may be made for the following, on a case by case basis and with the prior approval of the Headteacher or Business & Development Manager
 - Childcare or babysitting 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 either because they have special needs or because English is not their first language;

- All expenses claimed must be supported by receipts including mileage, where the fuel receipt is required even when the mileage does not represent the full amount of fuel purchased;
 - The cost of mileage relating only to travel to meetings/training courses will be paid at the current HMRC rate per mile;
 - Reasonable costs relating to other travel should be agreed in advance ensuring the cost is kept to the minimum possible but taking into consideration constraints on the travel. i.e. timings of events and other commitments the claimant may have;
 - Subsistence costs will be paid at the current rate. The Trust has adopted the Local Authority rates. Please note alcoholic beverages will not be reimbursed.
 - Photocopying/Printing and Postage should wherever possible be completed via the school only in exceptional circumstances will expenditure be reimbursed where these functions have been paid for independently;
 - Telephone charges, stationery, etc.
3. Eligible individuals will be able to claim for expenses incurred as a response to an emergency situation even if not agreed in advance; in this case the Headteacher or Business & Development Manager will approval reasonable expenditure retrospectively.

Persons wishing to make claims under these arrangements, once prior approval has been sought, should complete a claims form (obtainable from the School Finance Office), attaching receipts for all expenditure, and return it to the school via the Clerk to the Governors within one month of the date when the expenditure is incurred.

The Trust acknowledge that:

- No attendance allowances will be paid;
- There will be no reimbursement for loss of earnings.

Claims will be subject to independent audit and may be investigated by the Chair of Directors if they appear excessive or inconsistent.

This policy will be reviewed every two years.