



Members', Trustees' and School Board Expenses Policy

Revised: July 2025

To be reviewed: July 2026

SIGNED BY CHAIR OF TRUST BOARD:

DATE APPROVED: 10th July 2025

Principle Academy Vision

We put children first, pioneering excellence and championing each and every child.

Policy Statement

Boards of Trustees in academies are free to determine their own policy on the payment of allowances and expenses. The Pioneer Academy recognises that Members, Trustees and School Board (SB) members should not be out of pocket and should be able to claim allowances for legitimate expenses incurred in carrying out their duties.

Payment of Expenses

The following points should be noted when considering paying expenses:

- Payments may be made for any expenditure necessarily incurred by individual Members, Trustees and School Board (SB) members to enable them to carry out their duties;
- Allowances for travel cannot exceed the Inland Revenue Authorised Mileage Rates;
- Payments of other allowances must only be made on provision of a receipt. The amount to be paid should be determined by the Board of Trustees and be limited to the amount shown on the receipt;
- Members, Trustees and SB members cannot claim attendance allowances i.e. payment for attending meetings or for loss of earnings;
- Payments to Members and Trustees will be paid from The Pioneer Academy central account, whilst SB expenses will be paid from each individual school;
- Expenses paid will apply to all categories of governor, including associate members;
- All expenses must have been agreed and authorised by the Board of Trustees prior to submission of a claim

What allowances are eligible?

The Pioneer Academy will allow for payments by way of allowance in respect of expenditure necessarily incurred for the purpose of enabling individual Members, Trustees and SB members to perform the duties expected of them by the Board. Examples of eligible expenses necessarily incurred are:

- Childcare or babysitting expenses (excluding payments to a direct family member or former spouse or partner);
- Care arrangements for an elderly or dependant relative (excluding payments to a family member or former spouse or partner);
- Telephone charges, photocopying, stationery etc.;
- Travel to attend a course related to their duties.

This is not intended to be an exhaustive list. The Board of Trustees will consider claims and make their own decisions in light of the academy's needs. In making these decisions care will be taken to ensure not to make payments that incur tax.

Reimbursement of travel allowances

If travel is undertaken by means of public transport, the guidance on reimbursing only actual expenditure will apply. The limitations on travel made by private vehicle are obtained from the Inland Revenue who issue approved mileage rates which do not incur tax. It is acceptable to pay less than the authorised mileage rates but the rates must not be exceeded. The rates are changed annually and can be found on the Inland Revenue website: <https://www.gov.uk/expenses-and-benefits-business-travel-mileage/rules-for-tax>.

Expenses not allowable

No payments will be authorised for attendance payments or loss of earnings.

Approval of payment of expenses incurred

All Trustees of the Board are permitted to vote on the nature and rates of allowances irrespective of rules on declaring direct and indirect financial interests. However, if an individual's claim is being considered or approved, that individual must withdraw from the meeting as he or she will have a financial interest in the outcome of the discussion.

Once approved, a claims form should be completed (see appendix 1 to this policy), attaching receipts where possible, and returned to the school office. Claims will be subject to independent audit in the usual course of the financial year.

Appendix 1

THE PIONEER ACADEMY MEMBER OR TRUSTEE EXPENSES CLAIM FORM

Member or Trustee Name:

Address:

.....

Date of Claim:

Nature of Expense	£	p
Childcare		
Care arrangements for elderly or dependent relative		
Support for Members, or Trustees		
Support for Members or Trustees whose first language is not English		
Travel to training courses/meetings		
Travel/subsistence to national meetings or training events		
Telephone charges		
Postage		
Photocopying		
Stationery		
Other (please specify)		
TOTAL CLAIMED		

I claim the total sum of £..... for Member or Trustee expenses as detailed above. I have attached relevant receipts to support my claim.

Signed:..... Date:.....

Authorised:..... Date:.....

This form should be submitted to: The Chief Finance Officer.

Appendix 2

THE PIONEER ACADEMY SCHOOL BOARD EXPENSES CLAIM FORM

School Board Member Name:

Address:

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Date of Claim:

Nature of Expense	£	p
Childcare		
Care arrangements for elderly or dependent relative		
Support for SB members with special needs		
Support for SB members whose first language is not English		
Travel to training courses/meetings		
Travel/subsistence to national meetings or training events		
Telephone charges		
Postage		
Photocopying		
Stationery		
Other (please specify)		
TOTAL CLAIMED		

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

Signed:..... Date:.....

Authorised:..... Date:.....

This form should be submitted to: The Finance Manager at the appropriate school.