



THE ABBEY CE VA PRIMARY SCHOOL

GOVERNOR ALLOWANCES & EXPENSES POLICY

Implementation Date: June 2017

Review Date: June 2020

Scope & Applicability

[The School Governance \(Roles, Procedures & Allowances \(England\) Regulations 2013](#) applies to all maintained schools. The regulations make the provision for allowances to be paid for certain expenditure necessarily incurred by individual governors or associate members when carrying out their duties. Whilst Abbey School is a VA school, the Governors wish to adopt an allowances and expenses policy in line with these regulations.

The Governing Body acknowledges that governors cannot be paid an attendance allowance (i.e. payment for attending meetings), or for loss of earnings.

Any claim for expenses has to be met from the Governors' Current Account and/or school's delegated budget. Payment may be made from any other source or income to the school as long as the person providing the funds is made aware that they might be used for that purpose. Providing that only actual expenditure is reimbursed, Governors would not be liable for tax.

The Governing Body of Abbey School believes that this would be an appropriate use of funds available to the school, as it would help to ensure equality of opportunity to serve as governors to all members of the community.

This policy applies equally to all categories of governor.

Types of allowable expenses

Examples of where a claim may be made for incurred expenses include the following:

Expense Type	Notes
Child care or	<ul style="list-style-type: none">• Claims for the actual cost of reimbursement to a

babysitting	<p>child-minder or babysitter may be made whilst the governor is attending meetings of the Governing Body or its committees or other agreed activities, such as training events.</p> <ul style="list-style-type: none"> • Appropriate proof of payment should be submitted. • This <u>excludes</u> situations where the individual has a spouse, partner or other responsible adult who normally lives in the family home to care for his/her child(ren).
Care arrangements for an elderly or dependent adult	<ul style="list-style-type: none"> • Costs may be claimed for situations similar to those for childcare.
Telephone charges, photocopying, stationery, etc.	<ul style="list-style-type: none"> • Where a governor is unable to use the school's facilities for any of these items, a claim for reimbursement may be made. • Receipts must be kept where appropriate; in all other cases a detailed written record should be made and submitted.
Travel and subsistence	<ul style="list-style-type: none"> • Only in the event that a governor is travelling 40 miles or more via car on school business should a claim be made. • Where public transport is used, the actual cost of expenditure will be reimbursed, up to standard class rail travel. • Where it is not possible to use public transport the actual cost of a taxi fare will be reimbursed. Receipts will be required. • Mileage claims will be reimbursed at the level of rates published by HM Revenue & Customs. • Claims for subsistence allowances, i.e. for meals that would not otherwise have been purchased (up to the value of £5) or car parking charges that would not otherwise have been incurred, will be reimbursed upon the production of a receipt.
Special needs	<ul style="list-style-type: none"> • Any extra costs incurred by governors in carrying out their duties because they have special needs.
Other	<ul style="list-style-type: none"> • This list is not exhaustive and the Governing Body agrees to reimburse other justifiable expenses, e.g. teachers' leaving gifts, 'thank you' gift to auditor of governors' accounts, etc. • Note - 'other expenditure' should be agreed with the Headteacher or Treasurer Governor before

	it is incurred.
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Making a claim

To minimise administrative burden for the school and Treasurer Governor, governors should claim in arrears on a termly basis unless the amount to be claimed is substantial. However, it should be noted that the end of the financial year is 31 March so any expenses incurred in the spring term should be claimed 1 March, at the latest. This will enable the year-end position for both the school's and Governors' funds to be reported correctly.

Claims should be submitted on the appropriate claim form (see Appendix 1) and should be authorised as follows:

- School funds - Headteacher
- Governors' Current Account - Treasurer Governor

All claims will be reimbursed by cheque.

Since expense payments form part of the expenditure of public and/or governors funds, both will be subject to audits.

Policy review

The Resources Committee will review the policy on an three yearly basis.



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APPENDIX 1 - EXPENSES CLAIM FORM FOR GOVERNORS & ASSOCIATE MEMBERS

Governor's Name	
Governor's Address	

I claim the total sum of £ _____ in respect of expenses incurred whilst carrying out my duties as a governor / associate member of the Abbey CE VA Primary School Governing Body.

I have attached the relevant receipts in support of my claim.

Signed:

Date:

Expense Type	Amount (£)
Child care / babysitting	
Care arrangements for elderly or dependent relative	
Telephone charges, photocopying, stationery, etc	
Travel and subsistence	
Special needs	
Other (please specify)	

This form should be submitted to:

- Headteacher - school funds reimbursement
- Treasurer governor - Governors' Current Account reimbursement