



KALEIDOSCOPE
Multi Academy Trust

Trustee & Governor Allowances Policy

Approved by:	Kaleidoscope Trust Board	Date: October 2024
Next Review:	November 2025	

Contents:

Statement of intent

1. [Legal framework](#)
2. [Roles and responsibilities](#)
3. [Governors' allowances](#)
4. [Expenses eligible for reimbursement](#)
5. [Procedure for claiming expenses](#)
6. [Monitoring and review](#)

Appendices

- A. [Governors' Allowances Claim Form](#)

Statement of intent

Across Kaleidoscope MAT (KMAT) and its schools, we are dedicated to good practice and ensuring equality through school processes.

The School Governance (Roles, Procedures and Allowances) (England) Regulations 2013 (as amended) allow Trust and governing boards of maintained schools, who have a delegated budget, to decide whether they wish to reimburse trustees and governors, and associate members appointed by the trustee and governing board, for any expenses, e.g. travel and childcare costs, they have incurred when serving on the board.

This policy has been created with the aim of ensuring all trustees and governors receive reimbursements for any expenses where the school has benefitted from the individual attending in their duty.

1. Legal framework

This policy has due regard to all relevant legislation and statutory guidance including, but not limited to, the following:

- The School Governance (Roles, Procedures and Allowances) (England) Regulations 2013 (as amended)
- DfE (2020) 'Governance handbook'

2. Roles and responsibilities

The CEO/CFO (Trust) or Headteacher/Bursar (Schools) will be responsible for authorising reimbursements in line with the conditions outlined in this policy and with due regard for all relevant statutory guidance.

Trustees and governors will be responsible for:

- Only making claims for reimbursements in line with the conditions outlined in this policy.
- Following the procedure outlined in this policy when making a reimbursement claim.

3. Governors' allowances

Under The School Governance (Roles, Procedures and Allowances) (England) Regulations 2013 (as amended), schools may decide to reimburse trustees and governors, and associate members appointed by the governing board, in order to cover costs for evidenced expenses paid whilst fulfilling their roles. There are, however, restrictions on the circumstances under which trustees and governors can claim from the school. Trustees and governors must not claim for any reimbursement for loss of earnings due to attendance at meetings, or a payment allowance for attendance.

The circumstances in which trustees and governors may make a claim will be agreed in advance, but must only be for expenditure necessarily incurred to enable the person to perform any governance duty. Reimbursements will be authorised following submission of a claim form evidenced with receipts. Any payments to trustees and governors will only be authorised if the circumstances are deemed to be beneficial to the Trust/school and relevant to their role on the board.

Any car travel expenses will be returned at a rate not exceeding the HMRC approved mileage rates. Other approved expenses will only be granted upon provision of a receipt, and for only the amount shown on the receipt.

4. Expenses eligible for reimbursement

Trustees and governors will be able to claim expenses in the following instances, on a case-by-case basis and with prior approval:

Travel (no subsistence will be considered)

- Claims for expenses may be made for travel between the governor's household and the school, which will not exceed the annual level of mileage rates published by [HMRC](#)
- The nature of the visit must be specific to their role on the board, e.g. governors' meetings, training courses, etc.
- Payments will be reimbursed for use of public transport, upon production of a valid receipt.
- The costs of parking for pre-agreed governor business away from the school, where necessary, will be refunded only upon production of a valid, dated receipt.

Childcare

- In cases where a governor does not have a spouse or family member to care for a child when the trustee or governor must attend meetings relating to the work of the governing board, pre-agreed expenses will be returned for the cost of childcare or a babysitter, up to a maximum.
- Allowances will also be reimbursed for the cost of care for elderly or dependant relatives where the trustee or governor must be absent due to their governing duties.

Specific needs

- Trustees and governors may claim allowances for expenses relating to specific needs, incurred when carrying out approved duties.
- The circumstances in which governors can claim expenses for specific needs may include audio equipment or support from a signer, braille transcription, etc.

Telephone charges, photocopying, stationery, etc.

- Claims for reimbursements can be made where a governor is unable to use the school's facilities for any of the above.
- Allowances will be returned upon production of a dated, valid receipt, where appropriate. In all other cases, a full written report must be submitted.

This list is not exhaustive, and the Trust or school may decide to reimburse in other instances; however, this must be agreed in advance.

No claims will be considered for remote attendance at meetings or free online training.

5. Procedure for claiming expenses

Trustees and Governors should claim expenses on a **termly** basis, unless the amount to be claimed is substantial and/or urgent. Claims will be made using an agreed claim form and submitted to the CEO/CFO (Trust) or Headteacher/Bursar (School). Board Chairs should be asked whether they agree to the reimbursement.

Claims will not be reimbursed unless authorised by the Headteacher/Bursar. All claims will be subject to independent audit. If claims appear to be frequent or excessive, requests may be refused.

Claims can be made using the form in [Appendix A](#).

6. Monitoring and review

This policy is reviewed **annually** by the Trust.

A handwritten signature in blue ink that reads "Tristan Coy". The signature is fluid and cursive, with a long horizontal flourish extending to the right.

Approved by Kaleidoscope Trust Board

06/11/2024

Appendix A – Trustee & Governors’ Allowances Claim Form

This claim form consists of two sections. Section two must only be completed when payment has been made to another party, e.g. child carer.

Section one

Name of governor		Date
Date of expenditure	Details of expenditure	Claim
Total claim		£

[To be completed once authorisation of the claim has been approved.]

I certify that the above expenses are actual and necessary, and confirm that the payment has been received.

Signature of governor		Date
Signature of headteacher		Date
Reimbursed by (name)		Date

Section two

Duty of service	
Name	
Amount received (£)	
Signature	
Date	