

# EXPENSES POLICY - TRUSTEES



## The People's Learning Trust: Expenses Policy – Trustees

Policy Title:	Date Approved:	Approved by:	Review Date:
Expenses Policy - Trustees	13.03.25	Trust Board	March 2026
Expenses Policy – Trustees <b>Additions:</b> <ul style="list-style-type: none"><li>• Outlining that hotel bookings should be at a reasonable standard and cost.</li><li>• Claims after one month will be rejected unless exceptional circumstances.</li></ul>	12.02.26	Trust Board	March 2028

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# EXPENSES POLICY - TRUSTEES



## 1. Introduction

This Expenses Policy applies to all Trustees of The People's Learning Trust and is designed to ensure compliance with the Academies Financial Handbook and Charity Commission guidance on trustee expenses.

There are limited, specific circumstances in which individuals serving the governance structure of The People's Learning Trust (TPLT) can receive payments from the Trust. However, this should only take place where it is clearly in the best interests of the Trust. The same guidance can be used for Members.

Local Governing Bodies in the Trust's Academies are free to determine their own policy on the payment of expenses to their Governing Body. However, they will be reviewed regularly by the CFOO.

## 2. Principles, Aims & Objectives

TPLT's Board of Trustees believe that paying expenses to Trustees, in specific categories as set out below, is important in ensuring equality of opportunity for all members of the community and as such is an appropriate use of Trust funds. The specific items allowable reflect this objective.

## 3. Policy

Any Trustee of TPLT will be entitled to claim the actual costs, which they incur as follows:

- Reasonable cost of travelling to and from Trustee meetings, and on Trustee business and events; this can include the cost of using public transport, taxi fares and fuel allowance to the level permitted by HMRC (currently 45p per mile for a car, up to 10,000 miles).
- Trustees claiming mileage should maintain a log of journeys undertaken for Trust business, including date, purpose, and miles travelled, to support audit requirements.
- Reasonable refunds for the cost of meals taken while on Trust business.
- Hotel accommodation will only be paid where a Trustee is required to attend a meeting or event in person, and either:
  - The meeting or event extends beyond usual business hours, making same-day travel unreasonable, or Attendance requires travel from outside the immediate area (e.g., over one hour's travelling time each way).
  - Hotel bookings should be made at a reasonable standard and cost, with preference for cost-effective options.
  - Overnight accommodation before an event will only be paid where early attendance is required, and reasonable travel on the same day would not be practical.

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- Extra costs incurred in performing their duties either because they have additional specified needs or because English is not their first language.
- Any other justifiable expenses incurred in relation to Trustee duties.

Trustees acknowledge that:

- They will not be paid for attending meetings;
- They will not be reimbursed for loss of earnings.

## 4. Procedure

Trustees wishing to make claims under these arrangements must seek approval from the Chief Finance & Operating Officer (CFOO) before incurring the expense. Once approval is given, and the expenses have been incurred, Trustees should complete the appropriate claim form, attaching VAT receipts where appropriate, and return it to the CFOO for final approval within one month of the date when the expenses were incurred.

Claims submitted after one month of the expense date may not be reimbursed unless exceptional circumstances apply and prior agreement is obtained from the CFOO.

All expense claims will be reported to the Finance & Resources Committee.

All claims will be paid via electronic bank transfer (BACS) direct to the Trustee.

## 5. Roles & Responsibilities

Should any claims appear excessive or inconsistent, these will be reported by the CFOO to the Chair of the Trustee Board (or Chair of Finance & Resources Committee in respect of the Chair of Trustees) for investigation and may be subject to independent audit.

The CFOO will conduct periodic reviews of expense claims to identify patterns or anomalies, and the Trust Board will receive an annual summary report on Trustee expenses as part of its governance oversight.

This policy will be reviewed in light of operating experience and/or changes in legislation.