



Bellevue Place  
E D U C A T I O N T R U S T

## **BPET Expenses Policy (Trustee & Local Advisers)**

Signed:	
Chair of Trust Board:	Claire Delaney
Approved:	1 September 2018
Renewal period	2 Years
Review Date:	September 2020

# **BPET EXPENSES POLICY (TRUSTEE AND LOCAL ADVISER)**

## **Bellevue Place Education Trust – Our commitment**

*Learn. Enjoy. Succeed.*

Three words that mean the world to us.

Three words that have been with us from the day we started Bellevue Place Education Trust.

Three words that govern all that we do.

As a parent you can expect excellence, both in how we teach and nurture your child. We foster a positive attitude to life, encouraging a 'be interested and be interesting' attitude by providing a rich learning environment full of arts, drama, sport, music and academic rigour.

Bellevue Place children are happy, confident, successful 'all rounders' who expect to win and achieve in an inclusive setting where children, parents and school staff work together to provide the best. Our commitment to you and your child is that we will teach them to learn, enjoy and succeed both in their school career and beyond.

## **1.0 INTRODUCTION**

- 1.1 In accordance with the EFA Academies Financial Handbook, trustees and local advisers may claim for all reasonable out of pocket travel, accommodation or other expenses legitimately incurred by them in connection with their attendance at meetings or in carrying out their duties as trustees and local advisers of the Trust or school.
- 1.2 Trustees and Local advisers are not entitled to receive remuneration for their work as trustees and local advisers and may not claim for actual or potential loss of income or be paid attendance allowances.
- 1.3 Bellevue Place Education Trust believes that paying trustees and local advisers expenses, in the specific categories as set out below, is important in ensuring equality of opportunity to serve as trustees and Local advisers for all members of the community and so is an appropriate use of Trust and school funds.
- 1.4 Any exceptions to this policy need to be justified to and approved by the Trust before any reimbursable costs are incurred and reimbursements made.

## **2.0 ENTITLEMENTS**

- 2.1 All trustees and local advisers of Bellevue Place Education Trust and its schools will be entitled to claim the actual costs they incur for the following:
  - i. The cost of travel relating only to and from the Trustees and Local advisers home address to meetings/training courses provided such costs do not exceed Her Majesty's Customs and Revenue approved mileage rates. These rates currently paid to school staff are:
    - a) 25p per mile for cars and vans
    - b) 24p per mile for motorcycles
  - ii. For public transport from the Trustees and Local advisers home address, the actual costs incurred. Where more than one class of fare is available, the rate shall be limited to second class fares. The cost of travel by taxi will be reimbursed only in reasonable circumstances.
  - iii. Subsistence, if additional expenses are incurred because work as a local adviser requires taking meals (i.e. breakfast, lunch or dinner) away from the Trust or school. Reimbursement will be made for reasonable items bought on the day of the claim.

- iv. Telephone charges, photocopying, stationery, postage or other reasonable out of pocket expenses. Where practical however Trustees and Local advisers are expected to make use of administrative facilities made available within the schools.
- vii. Costs incurred in performing duties either because they have special needs or because English is not their first language with the prior approval of the Trust and for school Advisory Bodies, the Headteacher.
- viii. Any other justifiable expenses with the prior approval of the Trust and for school Advisory Bodies, the Headteacher.

### **3.0 SUBMITTING CLAIMS**

- 3.1 Trustees and Local advisers wishing to make claims under these arrangements, should complete a claims form (attached and available from the school office or Trust), attaching receipts where applicable, and return it to the Trust. Claims should be submitted at least half termly. Local advisers' expenses should be approved by the Headteacher of the local advisers' school. Trustees expenses need to be approved by the Chief Executive except where the Trustee is an employee of the Trust which then needs to be signed off by the Chair of the Trust Board.

### **4.0 TRANSPARENCY**

- 4.1 The total value of claims paid per year to Trustees and local advisers will be declared in a note to the Trust Financial Statements at the end of each financial year.
- 4.2 Claims will be subject to independent audit and may be investigated by the Chair of the Trust (or Vice Chair in respect of the Chair of the Trust) if they appear excessive or inconsistent.

### **5.0 MONITORING, EVALUATION AND REVIEW**

- 5.1 The Trust Board will review this policy every two years and assess its implementation and effectiveness.

# BPET Claims Form for Trustee and Local Adviser Expenses

Name:	Date:
School Name or Trust:	
Address:	
Post Code:	Claim Period:

	£	P
Public Transport travel to Meetings/training courses (include date and place of meetings):		
Taxi fares (please provide details):		
Car Mileage travel to Meetings/training courses (include date and place of meetings) @ £0.25 per mile:		
Parking:		
Telephone Charges:		
Postage:		
Stationery and Photocopying:		
Other: Including Childcare/babysitting expenses/Care arrangements for an elderly or dependent relative/Support for Trustees and local advisers with special needs/Support for Trustees and local advisers whose first language is not English:		
<b>TOTAL EXPENSES CLAIMED</b>		

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

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

Approved by: ..... Date: .....