

EXPENSES POLICY - TRUSTEES



The People's Learning Trust: Expenses Policy - Trustees

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1. Introduction

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).
- 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).
 - Overnight accommodation prior to an event will only be paid where early attendance is required, and reasonable travel on the same day would

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not be practical.

- 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) prior to 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 to the CFOO for final approval within one month of the date when the expenses were incurred.

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.

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

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Note: in the first year of operation, the Trust will be operating as one Board and as such Committees mentioned will not be in place. As such, all matters will be dealt with by the Trust Board.