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Governors' Allowances Policy

THE EDUCATION (GOVERNORS' ALLOWANCES) REGULATIONS 2003

NOTES FOR GUIDANCE

1. Summary of Key Points

1.1 The Education (Governors' Allowances) Regulations 2003 apply to all maintained schools and became effective on the 1st September 2003. The key points of the regulations are as follows:

- governing bodies can choose whether or not to pay governor allowances;
- governor allowances will continue to be paid from the school's delegated budget;
- In schools without delegated budgets the Local Authority may pay governor allowances;
- Allowances can also be paid from any other source of income to the School, so long as anyone providing those funds is aware that they may be used for this purpose;
- governors should not be out of pocket and should be able to claim legitimate expenses where governing bodies have approved schemes;
- any allowance for travel and subsistence cannot exceed the rates agreed nationally;
- expenses need no longer be limited to travel and subsistence;
- payment of other allowances must only be made on provision of a receipt;
- governors cannot claim attendance allowances or for loss of earnings.

You may wish to note that allowances can also be paid to governors serving on temporary governing Bodies, and to associate members.

1.2 Governing bodies are strongly advised to determine a policy that sets out the criteria and the rates of payment of governors' allowances. They may wish to consider the criteria set out in Sections 2 and 3 below.

2. Activities for Which Allowances Might be Payable

The Regulations allow for "payments by way of allowance in respect of expenditure necessarily incurred for the purposes of enabling the individual to perform any duty".



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2.1 The Governing Body may consider that governors should be entitled to claim allowances for the following activities:

- a) formal meetings of the governing body;
- b) formal meetings of committees of the governing body;
- c) other meetings requiring the attendance of any members of the governing body in connection with the discharge of the functions of the governing body or other statutory provision e.g. staff appointments etc;
- d) one visit per term to the school for each governor in addition to the meetings mentioned above;
- e) one additional visit per term to each school for the Chair of the governing body of that school.

3. Basis and Rates of Payment

3.1 For any meetings that come within the provisions of paragraph 2 the Governing Body may wish to adopt the following scheme of payments:

- a) Travel by rail – 2nd class fare;
- b) Travel by bus – the fare actually paid;
- c) Travel by the governor's own private motor vehicle where its use results in a substantial saving of governors' time or is in the interest of the Governing Body or is otherwise reasonable – the rates payable as adopted by the governing body however, expenses incurred through the use of private cars and motor cycles shall be at a rate not exceeding the Inland Revenue Authorised Mileage Rate as published from time to time.
- d) Subsistence – Re-imbursment for food and drink items bought on the day
Claimed
- e) Other eligible expenses agreed by the Governing Body (see below)

The current national rates issued by the National Joint Council (NJC) for Local Government Services which governing bodies may find helpful are as follows:

Motor Car Allowances

	451 – 999 cc	1000 – 1199 cc	1200 – 1450 cc *
Per mile – first 8,500 miles	40.5p	44.2p	
Per mile – after 8,500 miles	12.1p	12.1p	

* governing bodies may wish to note that under current Council policy the top mileage band is not used.



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Motor Cycle Allowances

	Rate per mile
Up to 150 cc	20.25p
Over 150 cc	24.3p

Subsistence Allowances

Subsistence allowances may be payable as set out below where governors are prevented by their official duties from taking a meal at their home or establishment where they normally have their meals and incur additional expense.

Rates

Breakfast	£4.48
Lunch	£6.17
Tea	£2.43
Evening Meal	£7.64

Other Eligible Expenses

The Regulations now allow for other expenses to be paid which could include the following:

- child care or baby sitting expenses;
- care arrangements for an elderly or dependant relative;
- support for governors with special needs (e.g. audio equipment);
- support for governors whose first language is not English (e.g. translations);
- telephone charges, photocopying, stationery etc.

As there are no national or local rates set for these other expenses the DfES has advised that individual governing bodies determine rates of payment. Payment must only be made on provision of a receipt. The amount to be paid should be determined by the governing body and limited to the amount shown on the receipt.

4. Method of Payment

After consultation with the Inland Revenue the Local Authority has produced the following advice on how these allowances may be claimed.

4.1 Reimbursement

a) *Car and Motor Cycle Mileage (including parking fees)*

It is strongly recommended that if mileage payments are made in accordance with nationally and locally agreed rates, such



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payments are made via the Local Authority's Central Payroll System. Such Payments are considered by the Inland Revenue to contain a "profit" element and as such may be subject to tax; they need not be taxed at source, but a schedule of all payments must be made to the Inland Revenue. This will be done by Education Finance.

b) *Reimbursement of Actual Costs for Bus, Rail Fares, Subsistence and Other Expenses etc.*

Reimbursement of actual costs incurred for expenses, including parking fees that are not incorporated within a claim for car or motorcycle mileage, may be made out of petty cash, as there is no profit element. Appropriate receipts, including those for VAT, must be provided.

5. Claim Forms

Claims that relate to car and motorcycle mileage should be submitted using the relevant claim form (Appendix A to this guidance), include the relevant receipts/tickets that relate to parking fees incurred. The forms are authorised by the Chair or Head Teacher, or other delegated governors as appropriate and submitted to School and Governor Support, Martineau Centre (Knox House), Balden Road, Harborne B32 2EH. No governor should certify his or her own claim for expenses. Governing bodies should ensure that an effective financial system for authorising payments is in place.

Further copies of the relevant claim form can be obtained by contacting your Governing Body Support Officer.

6. Other Information

6.1 Use of private vehicles and insurance documentation

Governors are reminded that if they use their cars for the discharge of their duties as governors, they are responsible for checking that their insurance cover is sufficient and appropriate.

If you have any queries that relate to these notes for guidance then please contact School and Governor Support on 0121 464 2222 or Email governors@birmingham.gov.uk



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Appendix A

GOVERNORS CAR AND MOTOR CYCLE MILEAGE

CLAIM FORM

Please note that payment is subject to the requirements of the Education (Governors' Allowances) Regulations 2003. Before submitting a claim you should ensure that your governing body has an approved scheme in line with these regulations.

Please ensure that you complete all of the requested details on both sides of this form in order to avoid a delay in payment.

Name:

Address:

Telephone Number:

School:

National Insurance Number:

Date of Birth:

Make and Type of Vehicle:

Registration Number:



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Engine Capacity:

Payment Details

Payment may be made either by cheque to your home address, or directly to your bank / building society. Please complete A or B accordingly.

A. Address for cheque to be sent to

B. Details of bank/building society

This Declaration must be completed in full

Tick Box

The vehicle being used is insured for "business use" purposes.	
The vehicle maintained is in a roadworthy condition.	
The vehicle has a current MOT certificate or an MOT certificate is not required.	
I have a valid driving license for the vehicle	
I have no medical condition that prevents me from driving	

Signature of Claimant



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FOR OFFICE USE ONLY

HRIS Personal Number

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School Budget Code

						K	3	1	0	A	0	0
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CAR AND MOTOR CYCLE MILEAGE CLAIMED

This section must be completed in full and where applicable receipts should be attached. Please remember that a valid VAT receipt for petrol must be attached to this form, for mileage claims.

Period of Claim From: To:

Date	Departing From	Returning To	Details	Mileometer readings		No of Miles Claimed	Parking
				Start	Finish		
Total Mileage and fees claimed							

Calculations

Number of Miles	P Per Mile	Total
Parking Fees		



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Total Amount Due	
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Signature of Officer checking calculations _____

I CERTIFY that journeys claimed were necessary in the discharge of official duties and that the mileage claim appears reasonable.

Signature Authorising Claim _____ (Chair, Head or Other delegated Governor)

Certified _____ (School and Governor Support)

I DECLARE that the journeys claimed were actually and necessarily incurred expenditure for travelling for the discharge of my governor duties for a school, which receives delegated funds from Birmingham City Council, and in accordance with the regulations.

Signature of Claimant _____ Date _____

Please return to: School and Governor Support Team

Martineau Centre (Knox House)

Balden Road

Harborne B32 2EH