**Trustee Expenses Policy for Prestbury Hall**

## 1. Introduction

This policy outlines the commitment of Prestbury Hall, managed by Prestbury Hall Users Group, to reimbursing legitimate and reasonable expenses incurred by its trustees in carrying out their duties. As a charity with a turnover under £20,000, we aim for a transparent and accountable approach to trustee expenses, ensuring value for money and compliance with charity law.

## 2. Principles

- **Reimbursement, not remuneration:** Expenses are intended to reimburse trustees for out-of-pocket costs incurred solely for the benefit of the charity, not to provide payment for their services.
- **Reasonable and necessary:** Expenses must be demonstrably incurred in connection with the trustee's role and be reasonable in amount.
- **Transparency and accountability:** All claims must be supported by appropriate evidence and records and be subject to approval.
- **No personal benefit:** Expenses must not result in any personal gain for the trustee.

## 3. Allowable Expenses

The following expenses may be reimbursed, subject to the principles above:

- **Travel:** Reasonable travel costs to and from meetings, training events, or when conducting business on behalf of the village hall. This may include mileage allowance (at the prevailing HMRC rate), public transport fares, parking charges, and, in exceptional circumstances, accommodation and subsistence costs.
- **Communication:** Costs of telephone calls, postage, and stationery directly related to the trustee's role.
- **Training:** Reasonable costs for attending training courses or conferences relevant to the trustee's role and the charity's activities.
- **Other:** Any other expenses deemed necessary and reasonable by the Trustees, such as childcare costs incurred while attending meetings (with prior agreement).

## 4. Exclusions

The following expenses will not be reimbursed:

- **Personal expenses:** Costs unrelated to the trustee's role, such as entertainment, gifts, or personal items.
- **Loss of earnings:** Trustees are not entitled to compensation for loss of earnings due to their voluntary role.
- **Expenses covered elsewhere:** Costs already covered by another source, such as insurance or another organisation.

## 5. Claims Procedure

- **Claim Form:** Trustees must submit a completed expense claim form, providing details of the expense, date incurred, purpose, and supporting evidence (receipts, invoices, etc.).
- **Timely Submission:** Claims should be submitted within two months of the expense being incurred.
- **Authorization:** Expense claims will be reviewed and authorized by the Treasurer or another Committee member.
- **Payment:** Reimbursements will be made by cheque or bank transfer within 30 days of authorization.

## 6. Record Keeping

- The charity will maintain accurate records of all expense claims and payments for audit purposes.

## 7. Review

This policy will be reviewed annually or more frequently if required by changes in legislation or charity best practice.

## 8. Declaration

By claiming expenses, trustees confirm that they have read and understood this policy and that the expenses claimed are in accordance with its provisions.

This policy aims to ensure responsible use of charitable funds and maintain public trust in the management of Prestbury Hall.

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