

STAFF EXPENSES POLICY

Policy Number: 87

Review Committee: ELT

Type of Policy: Non - Statutory

Review Period: Annually

Approved: March 2026

Next Review: March 2027



Version Control

V1.1	June 2024	New Policy
V1.2	November 2025	New Template - rebrand layout and new expenses form
V1.3	March 2026	Updated wording to align with FR and RSD in point 3.3

CONTENTS

1. Aims and introduction
 2. Roles and responsibilities
 3. Travel expenses
 4. Accommodation and subsistence
 5. Other expenses
 6. Process for claiming expenses
- Appendix 1: Mileage Expense Form

1. AIMS AND INTRODUCTION

This policy sets out the Trust's rules and procedures for claiming reimbursement for expenses, including travel and accommodation, incurred wholly, necessarily and exclusively in the performance of the duties of employment. Any attempt to claim reimbursement for expenses fraudulently or in breach of this policy may result in disciplinary action being taken as per the Trust's disciplinary policy.

It applies to all employees of the Trust. Trustees should refer to our governors and trustees' allowances and expenses policy.

This policy does not form part of any contract of employment or other contract to provide services and the Trust may amend this policy at any time.

2. ROLES AND RESPONSIBILITIES

EMPLOYEE CLAIMING EXPENSE	AUTHORISED BY
School Staff (excluding Headteachers/Heads of School)	Headteacher / Heads of School
Headteachers and Heads of School	CEO
Central Trust Team	CEO / CFO
Head of Finance and Operations	CEO
Executive Headteacher	Chair of Trustees

In addition, members of the Trust hold the following responsibilities:

2.1 Accounting officer

- Ensure all expenses requests made to them are handled according to this policy
- Review this policy on a regular basis [e.g. annually]
- Ensure compliance with all financial regulations
- Investigate expenses claims that appear excessive or inconsistent

2.2 Headteachers

- Ensure all expenses requests made to them are handled according to this policy
- Ensure all Trust staff are aware of the procedures set out in this policy

2.3 All staff

- Follow the procedures set out in this policy
- Keep full records of any expenses incurred, including all receipts

3. TRAVEL EXPENSES

Employees are responsible for any costs incurred in journeys between their home and normal place of work. This is defined as 'ordinary commuting'.

Travel beyond the normal place of work to carry out work on behalf of the Trust is defined as travel for 'business purposes'.

The Trust is committed to sustainable practices, and reducing the resources expended on travel, including staff time. As such, where possible, business travel should be avoided in favour of telephone or video calls as the first choice.

Employees should agree in advance with the person responsible for authorising their expenses (see table in section 2) whether the journey and chosen method of transport is appropriate.

3.1 Public transport

Employees are required to seek out the most cost-effective method of public transport for travelling on business purposes. This may include:

- Comparing different methods of transport
- Where possible, booking in advance to access reduced fares
- Using any rail cards or season tickets

Employees should travel in standard/economy class unless the cost of first class is the same or less.

3.2 Taxis

Taxis may only be re-imbursed in the following limited circumstances:

- Where staff have heavy luggage which cannot be taken on public transport
- Where there is no suitable or cost-effective alternative method of public transport
- To ensure the personal safety of employees, e.g. when travelling after dark in certain circumstances
- Where a group of employees are travelling together, resulting in lower costs than buying individual tickets
- When pre-arranged with the person responsible for authorising expenses in the case of illness, injury, disability, pregnancy or related factors

3.3 Personal vehicles and mileage

Employees may use their own vehicle for business purposes, where it is convenient and cost effective, and subject to the vehicle being safe, legal to drive, and having the appropriate insurance in place.

The Trust will cover expenses claims for:

- Tolls and congestion charges
- Reasonable parking costs
- Mileage, in line with current HMRC rates for travel

When calculating mileage expenditure, employees should use the distance travelled for business purposes. If setting out from home, the distance that would usually be travelled under ordinary commuting should be deducted from the total journey distance.

For avoidance of doubt, reimbursement for the business journey, where the business journey is to another school/site or a temporary workplace, is limited to the amounts exceeding the standard home-to-school (normal place of work) return journey.

The Trust will not cover the costs of:

- Vehicle insurance
- Fines (e.g. traffic offences, parking fines, wheel clamping unlocking)

4. ACCOMMODATION AND SUBSISTENCE

4.1 Accommodation

If an employee requires overnight accommodation for business purposes, wherever possible a room should only be booked to a maximum cost of

- £150 outside of Greater London
- £200 in Greater London

Any costs above these rates must be agreed with the person responsible for authorising expenses.

The Trust will not meet the costs of any extension to the stay for personal reasons, or for any accommodation for individuals other than the employee, for instance a partner, friend or family member.

4.2 Subsistence

Where employees are working away from their usual place of work and meals are not provided, they may claim reasonable subsistence costs up to a maximum of:

- £5 per 5 hours
- £10 per 10 hours
- £25 for 15 hours (and ongoing at 8pm)

The Trust will not reimburse the purchase of any alcohol.

5. OTHER EXPENSES

The person responsible for approving expenses may approve other categories of expenses occurred while on the business of the Trust on a case-by-case basis.

As a general rule, employees cannot claim for the following costs:

- Office stationery
- Internet connection
- Telephone and mobile expenses
- The cleaning of uniforms/equipment

Please note that the above list is not exhaustive and the Trust may amend this list from time to time.

6. PROCESS FOR CLAIMING EXPENSES

Wherever possible, employees must seek approval from the person responsible for approving their expenses (section 2.1) before incurring them. This is especially necessary for expenses which may fall outside of the categories or spending limits set out in this policy. Any failure to seek prior approval before expenses are incurred may result in the Trust withholding reimbursement of the expenses.

Employees must keep all receipts and proofs of purchase for incurred costs.

In order to claim expenses, employees must:

- Fill out the standard petty cash form or the mileage expense form found in Appendix 1 of this policy
- Attach all relevant documents (e.g. receipts or tickets)
- Submit form to the person responsible for approving their expenses within six months of the expense being incurred

If approved, the employee will receive reimbursement via bank transfer if over £40 and in cash under £40. At the Headteacher/ CFO's discretion a bank transfer can be paid for claims over £20.

In the case of disagreement about whether an expense should be approved, the case may be escalated to the CEO.

[illegible]