



Staff Expenses Policy

Approved by:	Governing Body
Date:	22nd Jun 2026
Next review date:	22nd Jun 2027
Person responsible:	Chief Financial Officer

1. Policy Introduction

- i. This Policy provides a procedure for staff to claim reimbursement for reasonable expenses incurred wholly, necessarily and exclusively in the course of the academy's business. These may arise from attending meetings, training or conferences. It is essential that Inland Revenue regulations are met and therefore this policy must be adhered to when making an expenses claim.
- ii. The policy applies to governors, directors, trustees, members of committees, full and part-time members of staff, agency staff working for the School, other temporary staff, and volunteers

2. Claiming Expenses

- i. Payments for the personal expenditure incurred by staff must be made using a Staff Expense claim form.
- ii. Staff should make reasonable efforts to get the best value possible when purchasing travel tickets, accommodation or meals if applicable. Before travelling, staff members are required to compare standard class public transport costs, and, if cheaper and practical, should opt for rail travel when a direct rail service is available.
- iii. Supporting documents are required as evidence, such as receipts and bills, which must be attached to the Claim Form to enable reimbursement.
- iv. Claim forms must be approved and signed by the Line Manager or Headteacher.
- v. Claims by a Headteacher must be authorised by either the Deputy Headteacher, School Business Manager if less than £150.
- vi. Claims which do not meet approval will not be processed and will be returned.
- vii. The original copy of a completed claim will be recorded and stored with relevant supporting documents.
- viii. All expenses must be claimed within the academic term of incurring the expense.
- ix. The submission of false claims will be treated as a serious matter and may lead to disciplinary action.

3. Travel Expenses

- i. Payment for business mileage will be paid if you incur mileage in your own vehicle a part of your daily work for the academy, excluding travel from your home to your permanent place of work. Payment will be made at the same rate as HMRC (currently 45p per mile if you drive a car or van, 24p per mile for motorbike and 20p for a bicycle).
- ii. Staff are encouraged to car share where possible. An additional 5p per business mile is claimable for carrying fellow passengers in your car.

- iii. Mileage claims must include a VAT receipt for fuel used. The claimant is responsible for attaching the receipt and the authoriser is responsible for checking the receipt is valid prior to payment.
- iv. An appropriate receipt must:
 - Be dated before the date/time of the journey claimed for.
 - Show the amount of fuel purchased in litres.
 - Show the name of the fuel supplier and their VAT registration number
 - Account for at least 25% of the total amount of the mileage claim.
- i. If several low mileage claims are submitted, a single receipt showing fuel purchased to cover all the miles claimed is sufficient.
- ii. If a member of staff starts/ends their journey at their home, and the distance travelled is less than the normal commute to work, no claim will be allowed.
- iii. The date of, reason for, starting point and destination of the journey should all be shown on the claim form, including post codes and passengers if car sharing is relevant.
- iv. Claims submitted not in the same academic term as the expense was incurred may not be paid.
- v. Parking or speeding fines will never be reimbursed with one exception, (parking tickets for the minibuses can be reimbursed at the Headteachers discretion).

4. Vehicle Insurance

- i. The academy does not provide car insurance for staff using their own vehicles. Staff members are responsible for ensuring they are appropriately insured with business insurance prior to travel.
- ii. Staff must also ensure that the car is safe and legal to drive.
- iii. Insurance certificates need to be on file if vehicles are used to transport school employee staff as passengers.

5. Use of Public Transport

- i. The use of public transport for eligible journeys will be reimbursed upon receipt, provided the expenses are reasonable.
- ii. Staff should use the most economical class of travel. Generally, standard or economy class.
- iii. Staff who normally travel by train to work cannot claim for a rail journey (or part journey) that is substantially the same as the normal commute to work when attending meetings or training away from School, to ensure equality with section 3 in relation to drivers.

- iv. The School will not pay for the travel of any accompanying person, unless their attendance is required as a representative of the School or the staff member requires assistance by means of reasonable adjustments.

6. Subsistence Allowance

- i. Meals may be claimed by staff required to attend meetings or professional development involving an overnight stay, and where refreshments are not included in the accommodation/activity booked.
- ii. No reimbursement will be made for an activity or visit where the staff member would normally have provided their own lunch e.g. School trips.
- iii. Overnight Subsistence Rates:
 - Reasonable expenses for the cost of accommodation, food and drink will be reimbursed when supported by receipts.
 - Allowances of up to £20 for dinner and £10 for breakfast, when these are not included in the accommodation cost, may be paid.
 - Subject to leaving home before 6:00am and purchasing breakfast enroute, one meal up to £5 will be allowed for over 5 hours spent away from home or normal workplace and £10 for two meals subject to being away for 10 hours and no food drink provided through meeting/training attended.
 - Only the cost of accommodation required for business purposes will be reimbursed by the School. It will not meet the cost of additional parties or accommodation provided to a spouse or other family members.
 - The School finance office should be involved in accommodation sourcing to ensure best value.
 - Personal items, such as alcoholic drinks, mini-bars etc. will not be reimbursed and their total should be deducted from any bills submitted for expenses purposes.

7. Telephone, Mobile & IT Related Expenses

- i. Business calls made from a home telephone may be reimbursed subject to provision of an itemised telephone bill and their inclusion on the Staff Expenses Claim Form.
- ii. Calls from personal mobile phones made for business purposes may be reimbursed subject to provision of evidence of the calls attached to the Staff Expenses Claim Form.
- iii. Line or equipment rental will not be reimbursed.
- iv. Broadband and Internet Connections – The School will not reimburse staff for personal broadband or internet connections as the School cannot demonstrate sole and exclusive business use to satisfy HM Revenue and Customs guidelines.

8. Training Courses

- i. The School provides training courses to enable employees to improve their effectiveness at work.
- ii. All costs and expenses of in-house training courses are borne by the School.
- iii. Where it is necessary for staff to travel to attend such courses, any travel and subsistence expenses incurred may be claimed as business expenses.
- iv. The School will also meet the cost of external courses where the training leads to the acquisition or improvement of knowledge, skills or personal qualities which are likely to prove useful in carrying out the member of staff's current or potential duties of their employment.
- v. These courses for which the School will pay, must be authorised by the appropriate line manager with the agreement of the Headteacher, before the training takes place. A request may be refused but in this case the line manager or Headteacher will give reasons.

9. Professional Subscriptions and Membership of Professional Bodies

- i. Personal professional subscriptions for members of staff are the personal responsibility of individual members of staff. If there are benefits to the School by being a member of an organisation, payment may be allowable but this must be agreed prior to the expense being incurred by the Headteacher.
- ii. If reimbursement is not agreed staff members may be able to claim tax relief for such costs either through their tax code or on their own tax self-assessment returns.

10. Tax Considerations

- i. Claims adhering to the procedures in this Policy will be paid without the deduction of income tax. However, it is the claimant's responsibility to ensure payment for any due tax is made.