



STAFF EXPENSES POLICY

Blessed Edward Bamber Catholic Multi Academy Trust

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This is a Trust-Wide Policy which applies to all academies within the Trust

Romans 13:7

Pay to all what is owed to them: taxes to whom taxes are owed, revenue to whom revenue is owed, respect to whom respect is owed, honor to whom honor is owed.

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1. Introduction

BEBCMAT Schools will reimburse staff for actual and reasonable expenses incurred wholly, exclusively and necessarily in the course of its business and in accordance within the maximum rates set in this policy. Expenses will only be paid for journeys undertaken on Trust / School business and subject to approval by Headteachers/Chief Finance Officer who will authorise the journey if deemed appropriate.

Official travel is any travel you are required to undertake away from your normal workplace on official business, including attendance at:

- A different BEBCMAT academy from your regular location;
- A training course;
- Business meetings or events taking place away from your regular location.

Travel and subsistence expenses reimbursed to a member of staff within the limits set by this policy will not give rise to a tax or national insurance liability for that member of staff. Expenses claims or payments that fall outside these guidelines should not be authorised.

Reimbursement Claims should be made by employees through the following method:

- Mileage – Claim through the Access payroll system through Self Service;
- Hotel Accommodation – If over £40, through the School Credit Card. If under £40, through the “Claim For Reimbursement” form;
- Train Tickets – If over £40, through the School Credit Card. If under £40, through the “Claim For Reimbursement” form;
- Air Fares – If over £40, through the School Credit Card. If under £40, through the “Claim For Reimbursement” form;
- Taxi Fares – Through the “Claim For Reimbursement” form;
- Parking/Toll Charges – Through the “Claim For Reimbursement” form;
- Subsistence – Through the “Claim For Reimbursement” form.

All travel claims made through the School Credit Card and “Claim For Reimbursement” form must be supported by a relevant VAT receipt for the claim. Claims will not be authorised when supporting receipts are not provided and credit card slips alone will not be acceptable.

Staff should submit claims for reimbursement of expenses not later than two months following the time which the expenditure was incurred. Late claims will result in a delay of reimbursement or, exceptionally, rejection of the claim. The authoriser should check that all receipts are attached and that expenses have been incurred in accordance with these guidelines. The Head Teacher / Chief Finance Officer will have final authorisation of all claims.

2. Allowable Travel Allowances

2.1 Mileage

Process through ACCESS Self-Serve

At no time will a claim be accepted for mileage that may be considered part of the staff member's usual journey to and/or from work.

Staff using their own car for a business journey must submit evidence through Access that they have appropriate insurance cover (i.e. business use), a roadworthy vehicle with MOT if applicable and a valid driving licence prior to making any claim. Records of these documents will be retained on Access when staff are making mileage claims. Where any of these circumstances are not met the claim will not be paid.

The current rate at which mileage allowances are paid as per HMRC guidelines in any Tax year:

- Up to 10,000 - 45p per mile;
- Over 10,000 – 25p per mile;
- Motorcycle miles – 24p per mile.

Parking charges and tolls for business meetings will be reimbursed when supported by a valid receipt when authorised by the Head Teacher/Chief Finance Officer. Any fines or penalties incurred for motoring or parking offences will not be reimbursed under any circumstances and are the responsibility of the member of staff.

2.2 Taxis

Process through the “Claim For Reimbursement Form”

Taxis may be used only where there is no other public transport available or when they are more cost effective than other forms of transport. They may also be used for short journeys with heavy luggage. Claims for taxi fare should be supported by receipts. All taxi drivers will produce a receipt if requested.

2.3 Train and other public transport

Process through the “Claim For Reimbursement Form” or School Credit Card if over £40

Travel by train should be by standard class ticket. First class tickets will only be reimbursed if evidence is provided to show that this was the cheapest option. Tickets for staff should be purchased in advance. Travel by local train and underground systems at a destination must be supported by full receipts. Travel claims by bus must be accompanied by full receipts or tickets.

2.4 Air Travel

Process through the “Claim For Reimbursement Form” or School Credit Card if over £40

Air travel should only be used when it is cost effective, e.g. cheaper than by train, or where the time saving is sufficient to justify any extra expenses over road and rail travel. Staff may only travel by air with the prior approval of the Head Teacher and Chief Finance Officer.

2.5 Subsistence

Process through the “Claim For Reimbursement Form”

Subsistence expenses will be paid to or on behalf of members of staff who are prevented, by performing the School’s/Trust’s business away from their normal place of work, from taking a meal that they would normally take at their home (breakfast or evening meal) or place of work (lunch). The Inland Revenue allows the reimbursement of, or payment by the School of “necessary subsistence costs” provided that they are not “unduly lavish”. The subsistence levels set by the Trust are maximum levels and should not be treated as targets.

The limits set by the Trust are advised rates from the Inland Revenue:

Journey Time	Maximum Claim
Up to 5 hours	£5
Up to 10 hours	£10
15 hours or more	£25

The maximum claim in any one day or 24 hour period must not exceed £25.00.

There will be no reimbursement for the purchase of alcohol and any such purchases will be at your own expense.

All journeys undertaken and other expenses claimed can only be accepted on the understanding that economy and practicality are exercised by the claimant. All claims may be accompanied by a receipt detailing item purchased, and may be subject to final scrutiny and arbitration by the Headteacher/Chief Finance Officer.

3. Overnight Accommodation

Process through the “Claim For Reimbursement Form” or School Credit Card if over £40

Hotel accommodation may be used in the following circumstances:

- School business that is being conducted at a location or locations away from the member of staff’s place of work over a period of more than one day where it would not be practicable or cost effective to return home overnight; or

- Where it would not be practical to travel on the same day to or from a location where School business is being conducted e.g. where the business journey would have to be commenced before 0700 hours or ended after 2200 hours.

Hotel accommodation should be booked in advance with prior authorisation from the Head Teacher/Chief Finance Officer.

The indicative maximum rates for overnight accommodation are:

- Central London £150 per night;
- Rest of UK £85 per night.

4. Review

The Directors (FSP Committee) will review this policy in line with the procedure for policy review. Date for review - if no other reason for review (see policy review procedure) this policy will be reviewed in 3 years.