



## **Expenses Policy**

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## Version History

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Date	Author	Version	Comment
September 2021	J Younger		Reviewed
March 2023	J Younger		Reviewed
Sept 2023	J Osbourne		Reviewed and updated – included AIC Member allowances; Updated mileage rate to 45p
May 2024	J Osbourne		Amend hotel rates
Sept 2024	J Osbourne		Mileage rate updated to 40p
June 2025	J Osbourne		Reviewed – no changes

## **1. Principles**

The aim of The Enquire Learning Trust's Expenses Policy is to ensure that public funds are used, and seen to be used, only for activities and events, which are necessary to support the promotion and aims of the Trust.

All costs incurred should take into account the need to ensure best value is achieved from the use of Trust public funds.

## **2. Purpose**

To provide clear guidance on the type and amount of expenditure that may be incurred.

## **3. Guidelines**

Employees should only incur expenses as shown in the guidelines below. At all times staff should be mindful that expenses should only be incurred that are, and that are seen to be, wholly necessary for the performance of Trust/academy activities.

Personal loyalty cards must not be used when purchasing on behalf of the academy or Trust.

## **4. Authorisation**

The below expenses may be incurred on the Trust's charge card or reimbursed on expense forms provided they are duly authorised in accordance with the Finance Policy.

Any expenses expected to be incurred which are greater than the amounts stipulated below, must be approved in advance by the Trust/Principal.

## 5. Claimable Expenses

Please see the table below:

Description	Accommodation	Subsistence			Beverages	Travel
		<u>Breakfast</u>	<u>Lunch</u>	<u>Dinner</u>		
<b>Working away from office</b>	Not Applicable	Unless provided Maximum of £15 per head. If leaving home before 7am	Unless provided Maximum of £15 per head.	Unless provided Maximum of £25 per head. This should also include a non – alcoholic beverage of your choice. If not returning home until after 7.30pm	Not Applicable	Cost of standard transport or mileage at 40p per mile.
<b>For Overnight Courses/ Meetings</b>	Cost should be kept to a maximum of £120 per night (or the lowest possible price). Excluding London stays Unless limited notice is given.	Unless provided Maximum of £15 per head.	Unless provided Maximum of £15 per head.	Unless provided Maximum of £25 per head. This should also include a non – alcoholic beverage of your choice.	Not Applicable	Cost of standard transport or mileage

Any other expenses incurred in carrying out work that is attributed to the Trust/Academy can be claimed with prior authorisation.

All overnight stays should be booked via the Office Manager and the DoF.

Expense claims will be subject to independent audit and may be investigated by the DoF if they appear excessive or inconsistent.

## 6. AIC Member / Trustee Allowances Policy

The Trust believes that paying Trustees/AIC Members allowances, in specific categories as set out below, is important in ensuring equality of opportunity to serve as Trustees/AIC Member for all members of the community and so is an appropriate use of academy funds. The specific items allowable reflect this objective.

All Trustees/Members of the Trust will be entitled to claim the actual costs, which they incur, as follows:

1. Trustees/Members will be able to claim allowances providing the allowances are incurred in carrying out their duties, as a Trustee/Member of the Trust, and are agreed by the DOF or Director of Governance and Development that they are justified before any reimbursable costs are incurred.
2. Trustees/Members will be able to claim for the following, on a case-by-case basis and with the prior approval of the DOF or Director of Governance and Development:
  - The cost of travel relating only to travel to meetings/training courses at a rate of £0.40 pence per mile, over 15 miles from their academy;
  - Travel and subsistence costs in accordance with the Expenses Policy;
  - Telephone charges, photocopying, stationery, postage etc;
  - Any other justifiable allowances.

### The Trust acknowledges that:

- Trustees/Members will not be paid attendance allowance;
- Trustees/Members will not be reimbursed for loss of earnings.

AIC members wishing to make claims under these arrangements, once prior approval has been sought, should complete a claims form (obtainable from the Academy Business Manager or DOF), attaching receipts, and return it to the Trust within two weeks of the date when the allowances were incurred, when they will be submitted for approval by the DOF. Trustees should send claim forms to the Director of Governance to be approved by the DOF.

Claims will be subject to independent audit and may be investigated by the DOF if they appear excessive or inconsistent.

## 7. Transport

**Cars** - Where it is cost effective for you to use your car for business travel, and you have been authorised to do so, you can a claim mileage allowance on proof of mileage in accordance with the current authorised mileage rates authorised by the Trust. The cost of reimbursement for mileage will be 40p per mile. All mileage claims need to be authorised by the Principal/DOF before being paid via payroll.

Any employee claiming mileage allowance must provide proof of business insurance to the Academy Business Manager or Director of People (for central staff).

**Trains** – The Trust/Academy will endeavour to book all trains in advance to your travel date but if not done so you will be reimbursed for the cost of standard class travel unless expressly authorised by the trust. A receipt should be obtained for submission with an expenses claim form.

**Taxis** – The Trust/Academy will reimburse any reasonable costs for taxis to and from the train station/ venue to your hotel or place of work.