SANCTA FAMILIA
CATHOLIC ACADEMY TRUST

Staff Expenses

Internal Use

Policy Owner:	CFO
Review Cycle:	Annually
Date of last review:	July 2026
Date of next review:	July 2027

Contents

Introduction

The Sancta Familia Catholic Academy Trust applies this policy to all employees of the Trust (collectively referred to as "you" and "Staff" in this policy) who are advised to familiarise themselves with its content.

This policy sets out the Trust's guidelines for the reimbursement of travel, hotel and other expenses you may incur whilst working for the schools/ Trust. It also sets out the procedure for obtaining reimbursement, including the evidence you must provide and the level of authorisation you must obtain.

This policy does not form part of any employee's terms and conditions of employment. It is not intended to have any contractual effect. We reserve the right to amend this policy at any time.

In providing reimbursement of expenses, we will comply with our obligations in respect of PAYE deductions for income tax and national insurance contributions.

If you are uncertain as to whether a particular expense will be reimbursed, please contact the School Business Manager before the expense is incurred.

Reimbursement of Expenses

We will reimburse all reasonable expenditure incurred in accordance with this policy. Any attempt to make an expense claim that is fraudulent, or in breach of this policy, may lead to disciplinary action in accordance with our Disciplinary Policy and Procedure.

In accordance with this policy, you must obtain the prior approval from your Headteacher (or in the case of the Headteacher claiming expenses, the CEO) before incurring any expenses.

The following expenses are those not permitted to be claimed by staff:

- employees acting as agents for the School/Trust – where an employee pays for any goods and services which are not specifically consumed by the employee then the reimbursement should be made via accounts payable;
- relocation expenses;
- parking and speeding fines.

Expenses will only be reimbursed if they are:

- claimed using forms that are available from your School Business Manager and submitted to your Line Manager;
- submitted within 12 weeks of the date on which they were incurred (unless in exceptional circumstances);

- supported by relevant documents (for example, VAT receipts, tickets, and credit or debit card slips); and
- where required, authorised in accordance with instructions in force at the time the expense was incurred.

Claims for authorised expenses submitted in accordance with this policy will be paid directly into your bank/building society account.

In exceptional circumstances we may, at our discretion, agree to reimburse expenses that have not been incurred or submitted in accordance with this policy. In each case you should provide full details of why it was not possible to follow this policy.

Any questions about the reimbursement of expenses should be put to your Line Manager before you incur the relevant costs.

Submitting Expenses Claim

When submitting your claim, you must provide evidence of the expenses claimed in the form of original receipts, invoices or similar documents setting out:

- the name, address and VAT registration number of the supplier;
- the cost (including VAT) and description of the goods or services; and
- the date of the supply.

When submitting claims for items paid by credit card, you must provide an itemised receipt giving details of VAT registration numbers and amounts.

We reserve the right to refuse to reimburse any claim that has not been submitted before the deadline set out above, unless exceptional circumstances apply explaining the late submission.

Travel Expenses

We appreciate that significant amounts of travel is essential for some roles in our Trust. Therefore, we will reimburse the reasonable cost of necessary travel in connection with our business for those working across several schools and expected to travel to those schools regularly. The most economic means of travel should be chosen if practicable / possible and you should use existing travelcards and season tickets wherever possible. Travel expenses should be agreed in advance by colleague's line managers. Travel expenses should not be claimed by colleagues for travel that is mainly for their own purposes.

1. **Trains**
   You will only be reimbursed for the cost of standard class travel unless expressly authorised in accordance with the current authorisation procedure to travel first class. A receipt should be obtained for submission with an Expenses Claim Form.

2. **Taxis**

We do not expect you to take a taxi when there is public transport that would not greatly increase your journey time. However, when this is not the case, or the number of staff travelling together makes it cost effective to do so, you can travel by taxi. A receipt should be obtained for submission with an Expenses Claim Form.

3. **Car**
Where it is cost effective for you to use your car for business travel, and you have been authorised to do so and have insurance for business use, you can claim a mileage allowance on proof of mileage in accordance with the current authorised mileage rates as stipulated by HMRC. Details of the current mileage rates can be obtained from your School Business Manager. You can also claim for any necessary parking costs which need to be supported by a receipt or the display ticket.

Accommodation and other Overnight Expenses

If you are required to stay away overnight in the course of your duties, you should discuss accommodation arrangements with your Line Manager in advance. Where possible, arrangements will be made by School Business Manager on your behalf, but where this is not possible you will be advised of the documentation that you will need to submit to reclaim expenses.

When making a hotel booking for the purpose of Trust business you are expected to exercise common sense when choosing your hotel, based on cost, location and availability. The cost of accommodation should not exceed £150. We may choose not to reimburse you for any amount in excess of these limits.

For the avoidance of any doubt, when the cost of attending an event (such as a conference) involving an overnight stay includes the cost of accommodation and/or meals, additional claims under this policy must not be made for those items.

Entertaining Expenses

You must obtain prior authorisation from the CEO before incurring expenses for entertaining clients and/or suppliers.

Your Line Manager will normally authorise such entertaining expenses if they are within the budget and the purpose of entertaining the particular client and/or supplier, for example, to discuss a particular business project, or to maintain an existing business connection (or to form a new one).

We will reimburse you for entertaining expenses provided they are authorised in advance, within the budget set for the event and incurred wholly, exclusively and necessarily in the performance of your duties.

A proposal to entertain clients should be made in writing and should include the following details:

- what form of entertainment is proposed (for example, a meal at an identified restaurant);
- who will be attending both from our business and from the client;
- how it is considered that our business interests will be furthered by your proposal; and
- the costs it is anticipated will be incurred.

Your Line Manager will discuss your proposal with you and, subject to authorisation, where possible, arrangements will be made by the finance team on your behalf. Where this is not possible you will be advised of the documentation that you will need to submit to reclaim expenses.

We will not normally reimburse you for the cost of entertaining other employees of the Trust.

To ensure compliance with the Bribery Act 2010, you must ensure that any client and/or supplier entertaining is in accordance with our Gifts and Hospitality Policy.

Training Courses

We will meet the reasonable cost of training courses which we consider necessary to enable employees to improve their effectiveness at work.

All costs and expenses of any internal training courses will be covered by the Trust. However, we will also meet the reasonable cost of external training courses where we consider such training is necessary or will lead to the development of knowledge, skills or personal qualities which are likely to prove useful in performing your current or potential duties of employment. This decision is entirely at our discretion.

Training courses for which we will pay, must be authorised by the appropriate by the Headteacher (or in the case of the Headteacher, the CEO). A request may be refused, but in these cases a reason will be given.

Any related accommodation and travel costs will be subject to the provisions set out above (see 'Accommodation and other Overnight Expenses' and 'Travel Expenses').

Subscriptions to Professional Bodies

Professional subscriptions are the personal responsibility of individual members of staff.
We will not normally meet the cost of subscription to an approved professional body or learned society, although individual staff members may be able to claim tax relief for these costs either through their tax code or on their own tax self-assessment returns.

However, if there are benefits to us through being a member of an organisation, payment may be allowed but this must be agreed, prior to the expense being incurred, by the Headteacher (or in the case of the Headteacher, the CEO).

Telephone [and Personal Device] Expenses

If you use your private mobile or landline telephone for business telephone calls, we will reimburse you for the reasonable cost of these calls on submission of a copy of the itemised telephone bill(s), where they are wholly, properly, and necessarily incurred in the proper performance of your duties.

Spectacles for Display Screen Equipment (DSE) users

Members of staff required to operate DSE in order to carry out their duties will receive appropriate training to do so.

We may pay an amount up to £25.00 towards the cost of an eye test and provision of spectacles for DSE users.

Any payment made by us towards the costs of spectacles will be limited to the specified amounts. Expense claims must be authorised by your Headteacher (or in the case of the Headteacher, the CEO) and should be made to the School Business Manager.

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