Bishop Chadwick Catholic Education Trust

Staff Expenses Policy

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1 Introduction and Scope

Bishop Chadwick Catholic Education Trust (the "Trust") Staff Expenses Policy reflects the need to ensure that public funds are used only for activities and events which are necessary to support the promotion of the aims of the Trust and the need to provide value for money.

This policy applies to all staff and to all expenditure, regardless of the funding source, and covers all personal business expenses irrespective of the payment method applying equally to credit card transactions, purchase invoices and individual expense claims.

The policy reflects the need to manage our activities efficiently, keeping bureaucracy to a minimum, while complying with tax and other statutory obligations. In this policy, "Trust" applies to all parts of Bishop Chadwick Catholic Education Trust, including the academies and the Central Trust team.

2 Guidelines

a) Travel

Using your own vehicle on business

All authorised business journeys will be reimbursed at the rates outlined in this policy.

Staff are encouraged to car share where practical in order to reduce unnecessary costs to the Trust and to promote our sustainability agenda.

Staff are encouraged to make journeys exceeding a 50-mile radius by public transport unless a car journey is more efficient and approval for mileage to be paid is given in accordance with the authorities set out in section (f).

Should an employee choose to use his/her own transport for a journey in excess of a 50-mile radius it will be paid at the rate of public transport (the number of passengers multiplied by the public transport rate OR mileage at the appropriate rate, whichever is lower.)

Commuting mileage refers to journeys each way from home to workplace and workplace to home on normal/contractual working days and will not be reimbursed.

Business Mileage

Journeys that you make for approved business reasons, including journeys to a temporary workplace (temporary workplaces are those where you will attend, or work at, on a temporary basis and for a limited time) will be reimbursed in full.

Reference must be made to the HMRC guidance if there is any doubt over what is classed as business mileage.

Staff must use the most direct route and claims are subject to checks on distance claimed and may be revised if incorrect.

The authorised mileage rate is the prevailing HMRC Rate

Type of vehicle	First 10,000 miles p.a	Over 10,000 miles p.a
Car	55p	25p
Motorcycle	24p	24p
Cycles	20p	20p

__Private Vehicle – Insurance and MOT__

Employees who use their own vehicle must ensure that the insurance covering that vehicle is adequate. The cover must be sufficient to permit the employee to drive the vehicle for business purposes. Vehicles must have a valid MOT as required. Documentation will be checked by the Business Lead.

NB the trust has an occasional business use policy via the fleet insurance policy. Staff must check via their Business Lead that they are eligible prior to making any journey for which they intend to rely on the policy.

__Car Parking Charges and Road Tolls__

Car parking charges will be reimbursed on production of a valid receipt. Road/bridge tolls will be reimbursed where they are necessary as part of the journey.

The Trust is not liable for any parking fines or road traffic penalties incurred by staff, regardless of circumstances.

__Train/Bus/Taxi/Air Travel__

Wherever possible travel will be booked and paid for directly by the Trust

If transport is not pre-booked using the Trust's financial procedures, reimbursement will be made via the appropriate claim form, on provision of appropriate supporting documentation.

__Train Travel__

Standard class rail travel together with the cost of reserving the seat will be paid, except in exceptional circumstances where first class travel is more cost effective and is approved in advance by the Headteacher or Chief Executive Officer (see section (f)).

__Taxis__

Taxi use must be reasonable and will only be reimbursed when staff are travelling late at night or if a taxi provides a more efficient option than public transport. Fares will be reimbursed only on production of a valid receipt and the cost of any tips given will not be reimbursed.

__Air Travel__

Staff who need to travel by air should travel at standard/economy class. Air Travel will be approved in advance (in line with the approvals per section (f)) and must be booked and paid for directly by the Trust.

b) Subsistence

__Meals and subsistence__

Employees are eligible to claim subsistence expenses if they are required to work away from the normal workplace and they must actually and necessarily incur additional expenses. Rates for approved expenses are as follows:

Expenses	Allowance
Out of pocket expenses (see note a) Out of pocket expenses, residential training courses only	• Per Night (£4.20) • Per Week (£16.75)
Subsistence allowances and reimbursements Actual Cost of Standard Meal in Restaurant Car (see note b)	• Breakfast (£7.15) • Lunch (£9.85) • Tea (£3.90) (see note b)

	• Evening Meal (£13.75) • Evening Meal – London (£20.00)

The Trust will reimburse the costs as stated on the receipt, or the amount stated above, whichever is the lower. Tips and service charges paid will not be reimbursed unless they are included as part of the bill.

Notes:

a) Receipts must be obtained for all expenditure incurred.
b) Tea or evening meal allowances claimed are taxable (P11D).

Alcohol

No reimbursement will be made for alcoholic drinks when on Trust business.

Overnight Accommodation

When meetings, conferences, events involve one or more overnight stays away from home, the accommodation expenses eligible for reimbursement will be agreed with the Headteacher/CEO (taking advice from the Central Services Finance team as required) in advance.

Wherever possible accommodation will be booked and paid for directly by the Trust.

Except in exceptional circumstances or with the prior approval of the Headteacher or Chief Executive Officer (in respect of Headteachers and Central Services staff), accommodation should not exceed a 'reasonable standard', i.e. a 3* standard, however if a 4* accommodation can be obtained at an equivalent price, or no 3* accommodation is available, this would be acceptable.

c) Uniforms

The Trust may provide uniforms for some employees. The provision of clothing will be arranged by the Trust. Costs may not be claimed by way of reimbursement in cash.

The academy or Trust logo will be imprinted/stitched into or otherwise permanently attached to all clothing provided, other than safety helmets.

d) Professional subscriptions

Unless otherwise agreed, personal professional subscriptions for members of staff are the responsibility of individual members of staff.

e) Telephone calls and IT related expenses

Home and personal mobile telephone calls

Trust staff that are required to make business calls on their home or personal mobile telephones must attach the appropriate bill to the staff expenses claim form with the relevant business calls highlighted and only these will be reimbursed. If you are away on business overnight and need to make essential personal calls, see Subsistence, above.

Colleagues are encouraged to use school land lines to call parents or students rather than personal mobiles. Where colleagues are unable to use the school telephone and use their personal mobile, arrangements must be taken to conceal your personal number before dialling.

Broadband and Internet Connections

The Trust will not reimburse staff for broadband or internet connections except for reasonable wifi connection costs when travelling on business.

Provision of a mobile phone

Certain staff will be provided with a mobile telephone, funded by the Trust, where it is necessary for them to fulfil their responsibilities. In such circumstances, the bill will be directed to the Trust and will not need to be claimed via the Expenses Claim procedures above. Such mobile phones are for business use and personal calls should be kept to an absolute minimum.

f) Claim Forms

All mileage, travel and meals claims must be paid via claim forms and not via petty cash. Claims should be made on a regular basis and should be authorised, checked and signed by the Business Lead as appropriate. No claimant may authorise their own claims and therefore the following applies:

- Claims for the Business Lead must be approved by the Headteacher.
- Claims by Central Team staff will be authorised by the Chief Executive Officer.
- Claims by the Headteacher will be authorised by the Chief Executive Officer.
- Claims by the Chief Executive Officer will be authorised by the Chair of the Board.

Claims should be submitted monthly.

Payment of claims may be withheld if they are not made promptly or if journeys were not previously authorised, or if claims are deemed to be unreasonable, excessive or above the level previously authorised for the individual. VAT receipts for actual expenditure (other than mileage) must be provided in order to claim reimbursement.

All payments will be made through payroll and any taxable elements will be deducted as required. There is no need to declare expense payments paid in this manner in any personal tax return.

Any attempt to submit a false claim form is fraud and will be treated as a serious disciplinary offence.

g) Links to other policies

This Travel and Expense policy statement should be read in conjunction with the following Trust and academy policies:

- Staff Code of Conduct
- Cardholder Use Policy
- Finance Policy
- Disciplinary Procedure
- Equality, Diversity and Inclusion Policy.

This policy statement will be reviewed at least every three years.