



# Staff Expenses Policy

Revised: July 2025

To be reviewed: July 2026

SIGNED BY CHAIR OF TRUST BOARD:

DATE APPROVED: 10<sup>th</sup> July 2025

## Principle Academy Vision

We put children first, pioneering excellence and championing each and every child.

## Introduction

Staff may claim reimbursement for reasonable expenses incurred wholly, necessarily and exclusively in the course of the school's business. These may arise from attending meetings, training or conferences, or purchases made on the school's behalf. Any purchase made on behalf of the school must be approved by the budget holder prior to purchase.

It is essential that Inland Revenue regulations are met and therefore this policy must be adhered to when making an expenses claim.

## Claiming Expenses

Payments for the personal expenditure of staff must be made using a Staff Expenses Claim Form.

All claims should be submitted as soon as possible after the date the expense was incurred.

The purchase of classroom equipment and items must be completed using the purchase ordering system and paid for directly by the school. A Staff Expenses Claim Form **may not** be used for reclaiming the cost of such purchases.

Staff should make **reasonable efforts** to get the best value possible when purchasing items, food or travel tickets.

Supporting documents required as evidence, such as receipts and bills, must be attached to the Staff Expenses Claim Form. Claim forms must be approved and signed by the budget holder or Head Teacher. Claims by the Head Teacher must be authorised by the Chief Operating Officer, Chief Finance Officer or Regional Director.

Claims which do not meet approval will not be processed and will be returned. The submission of false claims will be treated as a serious matter and may lead to disciplinary action.

## **Tax considerations**

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. Other expenses will be paid via payroll. If appropriate, these will be treated as benefits-in-kind and taxed accordingly.

## **Travel Expenses**

Payment for mileage will be paid at the HMRC rate (currently 45p per mile). The rate is paid irrespective of the fuel type or capacity of the car.

Staff are encouraged to car pool where possible.

If a member of staff starts/ends their journey at their home, and the distance travelled is less than the distance that would have been travelled had they started/ended at the school, the lesser distance will be paid.

The date of, reason for, starting point and destination of the journey should all be shown on the Staff Expenses Claim Form. Claims submitted over 60 days after the expense incurred may not be paid.

Parking or speeding fines will **never** be reimbursed.

## **Vehicle Insurance**

The school does not provide car insurance for staff using their own vehicles. Staff members are responsible for ensuring they are appropriately insured prior to travel. Staff must also ensure that the car is safe and legal to drive.

## **Use of Public Transport**

The use of public transport for eligible journeys will be reimbursed upon receipt, provided the expenses are reasonable. Staff should use the most economical class of travel. Generally, standard or economy class.

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.

## **Subsistence Allowances**

### **Overnight Subsistence Rates**

- Reasonable expenses for the cost of accommodation, food and drink will be reimbursed **when supported by receipts**.
- 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.
- 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.

## **Telephone and Mobile Expenses**

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.

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.

Line or equipment rental will not be reimbursed.

The School only provides mobile phones for operational purposes. Such phones are only to be used in emergencies and the individual will be required to reimburse the school for any personal use.

## **Enquiries**

All enquiries should be addressed to the line manager.

**TPA – STAFF EXPENSES CLAIM FORM**

NAME: \_\_\_\_\_

DATE: \_\_\_\_\_

QTY	Description / Details	Unit Price	Total Cost	Reason For Purchase
<b>TOTAL COST: £</b>				

AUTHORISATION GIVEN BY: \_\_\_\_\_

SIGNATURE: \_\_\_\_\_

DATE: \_\_\_\_\_

----- Please tear off & destroy bank details below once entered -----

**EMPLOYEE BANK DETAILS:**

Account Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

Sort Code: \_\_\_\_\_