

# Applecroft School



## Staff Expenses Policy

<b>Person Responsible:</b>	<b>Finance &amp; Business Manager</b>
<b>Review Cycle:</b>	<b>Annually</b>
<b>Reviewed Date:</b>	<b>January 2026</b>
<b>Next Review Date:</b>	<b>January 2027</b>

# Staff Expenses Policy

## 1) Introduction:

### **School Vision:**

'To be a positive and inspiring community that nurtures each individual and empowers leaders for life.'

### **School Mission Statement:**

'Nurturing Potential, Inspiring Minds, Changing Lives'

### **School Values:**

- Ambition and Leadership
- Kindness and Supportiveness
- Respect and Honesty
- Determination and Resilience

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. Efforts must be made to keep expenditure to within a reasonable budget.

The procedures in this policy are mandatory to all staff. Failure to comply with the procedures may result in disciplinary action.

## 2) Claiming Expenses:

All expenses must be authorised and no claimant may authorise their own claim. By authorising a claim, the authoriser is confirming that the costs have been incurred and incurred wholly for the purposes of the school's business, that there is sufficient budget to cover the expense and that supporting documentation, such as a receipt, is presented.

- Payment claims for the personal expenditure of staff must be made using a "Payment Request Form"
- The purchase of the majority of classroom equipment or educational items must be completed using the purchase ordering system and will be paid directly by the school
- Staff should make reasonable efforts to get the best value possible when purchasing items or food
- Supporting documents required as evidence, such as receipts and bills, must be attached to the "Payment Request Form"
- "Payment Request Forms" must be approved and signed by the budget holder, where appropriate
- Claims by the Headteacher must be authorised by the Chair of Trustees
- Claims that do not meet approval will not be processed and will be returned unpaid

- Claims submitted over two months after the expense is incurred may not be paid
- The original completed voucher will be recorded and stored with any supporting documents, within the Finance Office after payment has been made

### 3) Travel Expenses:

To help to minimise the school's carbon footprint, staff are encouraged to use public transport wherever possible.

#### 4) Use of Public Transport:

- The use of public transport for eligible journeys will be reimbursed (provided the expenses are reasonable), via payroll, upon completion of a travel expenses claim form
- Staff should use the most economical class of travel. Generally, standard or economy class. Efforts should be made to book tickets in advance rather than on the day of travel
- The use of taxis are only permitted when public transport is not available i.e. from home to a train station, station to a hotel/meeting. Taxi journeys should be limited to less than £10 where possible
- If special transport needs are required (due to disability for example) this should be discussed with the Headteacher prior to travel
- 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

#### 5) Using your own car on school business:

- The school has occasional business use motor insurance for staff using their own vehicles when carrying out the business of the school
- Payment for mileage will be paid at the Inland Revenue approved 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 (unless specific restrictions apply)
- 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
- Full details of the journey, including date, reason for journey, starting points and destinations, should be shown in the appropriate columns of the travel expenses claim form - a recent valid fuel receipt should also be attached to the travel expenses form where appropriate
- Claims submitted over one month after the expense was incurred may not be paid
- Parking or speeding fines will never be reimbursed

#### 6) Car Park Costs:

Parking costs incurred in the course of business travel may be claimed via the travel expenses claim form - relevant receipts should be attached.

## 7) Subsistence Allowances:

In relation to the level of subsistence offered by the school it is only the cost of accommodation required for business purposes that will be provided. The school will not meet the cost of additional parties or accommodation provided to a spouse or other family member. Full authorisation must be sought from the Headteacher before any booking is made.

As a rough guideline the following should be considered:

- Hotel cost less than £100 per night (Premier Inn, Travel Lodge preferred)
- Breakfast included in the hotel cost or less than £10
- Lunch less than £10
- Evening meal less than £25
- Tea/Coffee/Water at your discretion
- Alcoholic beverages will not be reimbursed.

## 8) Training Courses:

Subject to prior approval from the Headteacher, the school will bear the cost of external training courses where the training leads to the acquisition or improvement of knowledge, skills or personal qualities which are likely to prove useful in carrying out the duties of your employment or which better qualify you to undertake the duties of other areas of the school in due course.

## 9) Entertainment:

There will be occasions when it is appropriate to provide catering to visitors. For those visitors having a school meal cooked by our caterers, the school will be charged by invoice. If you are purchasing food directly the cost needs to be reimbursed using the same procedures as claiming expenses.

## 10) Enquiries:

All enquiries should be addressed to the Headteacher or Finance & Business Manager.