



**THIS POLICY COVERS ALL ACADEMIES/SCHOOLS WITHIN
ARDEN MULTI-ACADEMY TRUST**

Name of Policy	Staff Expenses Policy	
Lead	Martin Murphy, CEO	
Governor Committee	Business & Personnel Committee	
	Awaiting Approval	No
	Trustee Approved	9 th July 2024
Next Review	Autumn Term 2024	
Version No.	1	
Amendments		



Aims

The Arden Multi Academy Trust Staff expenses policy aims to detail when, how much and how employees can claim when incurring expenditure as part of their duties as an employee of Arden Multi Academy Trust.

It aims to ensure incurred staff expenses are reimbursed on a timely basis.

It aims to ensure that staff are aware that the Trust has a fair and transparent expenses policy in place that ensures public funds are used for their intended purpose.

Policy:

Arden MAT will reimburse employees the actual travelling and reasonable subsistence costs incurred by employees which are wholly, exclusively and necessarily incurred in the performance of their duties and the Trust's business.

Arden MAT will not reimburse employees for any expenses relating to private travel (this includes travelling to and from their regular workplace). Any personal expenditure or fees will require approval by Associate Headteacher, Executive Headteacher or CEO.

1. Travel expenses

When travelling on Arden MAT business the employee should use the most cost-effective form of transport available, this should be consistent with the purpose and schedule of the trip and take into account the number of people travelling and the time of day.

Wherever possible employees should travel by public transport, either train, bus or car sharing when making the same journey.

a) Public Transport Train Travel

Train travel, other than for local/short distance journeys, should be prebooked wherever possible. Staff are encouraged to get best value tickets and seek discounts as may, from time to time, be available. First Class or equivalent is allowable but only where it is needed to accommodate disability or accessibility needs (and no Standard Class facilities are available that would accommodate these needs) or where justified for information security reasons — for example, travel when working on sensitive/confidential matters.

b) Other travel

Taxis can be used at the discretion of the approver, but the reason for doing so rather than using public transport should be included on the expense reclaim form, e.g.:

- it is more economical because several employees are travelling together
- timing is critical for making an onward travel connection
- public transport is not available
- safety reasons
- health reasons or disability

2. Mileage

Use of private vehicles

Employees who use their private car on Trust business must seek prior authorisation from their Line Manager. Any employee driving on school business must adhere to the Arden MAT Drivers Policy and Handbook.

Employees must ensure that their car insurance includes business use and, when asked, be able to produce their insurance certificate.

If the employee uses their private vehicle for Trust business mileage the mileage will be reimbursed at the current HMRC tax free rates (Payroll/HR will notify employees of any changes to these rates):

	First 10,000 business miles in the tax year	Each business miles over 10,000 in the tax year
Cars and Vans	45p per mile	25p per mile
Motorcycles	24p per mile	24p per mile
Bicycles	20p per mile	20p per mile

Employees travelling during the working day departing from and returning to their place of work will be reimbursed the mileage for the journey.

If any employee travels directly from their home or returns directly to their home they must deduct their normal mileage from their home to their place of work from their mileage claim (*eg/ if an employee normally travels 5 miles to work but on this day has to travel from their home to a different Academy at a distance of 15 miles, they must deduct the 5 miles from their mileage claim, so can claim 10 miles*) and vice versa.

The mileage claim must include full details of the journeys including the date, reason for the journey, starting point and destination and the total mileage travelled. The distance travelled should be the shortest journey unless traffic conditions are such that it is more cost effective to take a different route.

Under no circumstances will the Trust reimburse the cost of speeding fines. Parking fines will be refunded in exceptional circumstances, where the situation is beyond the control of the employee and the situation must be approved by the approver.

3. Overnight Accommodation

If an employee is required to stay overnight on MAT business the MAT will reimburse the costs of hotel and subsistence.

The cost of a hotel should be as cost effective as possible. If the cost of the hotel is in excess of £80 (London £120) authorisation must be obtained by your Associate Headteacher/Executive Headteacher/ CEO prior to booking.

When staying overnight the employee can claim the following costs:

Breakfast £15 maximum if not included in the overnight accommodation cost
Evening meal £30 maximum

VAT receipts must be obtained for all expenditure. **Under no circumstances will Arden MAT reimburse the costs of any alcohol purchased.**

If the meal rates (especially breakfast) in the hotel you are staying in are greater than the above limits then you may use your reasonable discretion and claim a higher sum, for an evening meal the amount to be limited to a 2-course meal and a soft drink.

4. Overseas Travel – excluding school trips

Any overseas travel (excluding travel relating to school trips) must be approved in advance by the CEO/Chair of Trustees.

5. School Trips

Any subsistence for Staff accompanying pupils on residential trips is normally included within the costs of the trip. If any additional subsistence costs are to be incurred they should be included on the initial trip authorisation form and approved by the Senior Leadership Team.

6. Entertaining

It is recognised that there is a legitimate business need, on occasions, for representatives of the Trust to entertain or provide hospitality to official visitors to the Academies within the Trust.

When entertaining official visitors, the representation from the Academy should not be disproportionate to those being entertained. There should be more external guests than Academy employees at any one event and only essential employees should attend.

Water, teas, coffee, and other refreshments, including light lunches or a modest dinner are a permissible expense when providing hospitality to external visitors to the Academy, or candidates for interview. In-house catering provision will be used wherever possible and appropriate.

Hospitality costs must be authorised in advance. The reason for any such expense should be recorded including how it provides value for money to the Academy. The costs should be kept to a minimum.

The following information should be provided to support the expense claim:

- The names of the attendees.
- The organisation which they represent.
- The purpose of the entertainment.
- The reason why this provides value for money to the Academy.

Except in extenuating circumstances, when providing entertainment, if more than one member of the Trust is present, the most senior leader at the event must pay all the expenses associated with the event.

If the cost of entertaining is in excess of £50 per person (maximum of £300 per event) prior authorisation must be obtained from the Chair of Trustees or Chair of the MAT Business and Personnel Committee

Staff entertaining

Academy funds should not be ordinarily used to provide hospitality or meals for staff, but in special circumstances (such as training or interviews) as agreed by the Associate Heads/EHT/CEO or Trust Board a modest lunch may be provided (up to £30 per head).

Under no circumstances will the Trust reimburse staff for the purchase of alcohol

Good Working Practice

Any purchase that can be made in advance must be done so through normal methods of procurement. Staff members should not use their own credit cards/cash to make purchases for items that can be made through the Schools finance departments to maintain probity and budgetary control.

Expenditure on school purchase cards must abide by the Arden MAT expenses policy and must be reported in the same detail as reimbursed expenditure.

Where it has been established that expenses have been claimed that are contrary to this policy, and have not been correctly approved, the sums involved will be recovered from employees.

Similarly, expenses found to have been wrongly incurred on a Purchasing Card or through corporate contracts will also be recovered from employees.

If a member of staff attempts to submit a false claim this will be treated as a serious offence which may lead to disciplinary action and referral to the police.

Reimbursement

Claims should be made on the relevant form and submitted within three months of the date of expenditure. Claims must not transcend financial years.

a) Non-Mileage expenses

All non-mileage expenses should be claimed through the Arden MAT employee reimbursement claim form.

The form should be completed in full, all VAT receipts attached and authorisation obtained by the employee's Line Manager and Associate Headteacher, Executive Headteacher or the MAT CEO.

Authorised forms should be given to the school Finance Office for payment. Payment will be made by BACs on the next scheduled payment run.

b) Car Mileage

Mileage claims must be claimed through the Arden MAT employee mileage form. The authorised form must be returned to the School HR Manager to be processed through the school's payroll system. Payment will be made in conjunction with your salary payment on the next payroll run.