Staff Expenses Policy

Last Reviewed: November 2025

Next Review: November 2026

Implementation from: January 2026

Cycle: Annual

Version: 1.0

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Registered Office: The Old Grammar School, 13 Moorgate Road, Rotherham, S60 2EN

Contents

Changes to this Edition

DATE	DETAILS OF CHANGES
January 2026	First Edition – no changes

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1.0 Aims and Introduction

This policy sets out St Francis CMAT's rules and procedures for claiming reimbursement for expenses, including travel and accommodation, incurred wholly, necessarily and exclusively on the business of the trust or their school. Any attempt to claim reimbursement for expenses fraudulently or in breach of this policy may result in disciplinary action being taken as per St Francis CMAT's disciplinary policy.

It applies to all employees of St Francis CMAT. Trustees and local governing body members should instead see our policy on governors' allowances and expenses.

This policy does not form part of any contract of employment or other contract to provide services and St Francis CMAT may amend this policy at any time.

2.0 2.0 Roles and responsibilities

2.1 Authorisation

ROLE OF EMPLOYEE CLAIMING EXPENSE	EXPENSE TO BE AUTHORISED BY
School staff (excluding headteachers/heads of school)	Headteacher
Headteachers	CEO
Central trust team	CEO
CEO	CFO/chair of trustees

In addition, members of the trust hold the following responsibilities:

2.2 Finance Director

- Ensure all expense requests received are handled according to this policy
- Review this policy on a regular basis [annually]
- Ensure compliance with all financial regulations
- Investigate expenses claims that appear excessive or inconsistent

2.3 Headteachers

- Ensure all expense requests received are handled according to this policy
- Ensure all school staff are aware of the procedures set out in this policy

2.4 All staff

- Follow the procedures set out in this policy
- Keep full records of any expenses incurred, including any receipts

3.0 Travel Expenses

Employees are responsible for any costs incurred in journeys between their home and normal place or work. This is defined as 'ordinary commuting'.

Travel beyond the normal place of work to carry out work on behalf of the school/trust is defined as travel for 'business purposes'.

St Francis CMAT is committed to sustainable practices, and reducing the resources expended on travel, including staff time. As such, where possible, business travel should be avoided in favour of telephone or video calls as the first choice.

Employees should agree in advance with the person responsible for authorising their expenses (see section 2.1) whether the journey and chosen method of transport is appropriate.

3.1 Public transport

Employees are required to seek out the most cost-effective method of public transport for travelling for business purposes. This may include:

- Comparing different methods of transport
- Where possible, booking in advance to access reduced fares
- Using any railcards or season tickets

Employees should travel in standard/economy class unless the cost of first class is the same or less.

3.2 Taxis

Taxis may only be reimbursed in the following limited circumstances:

- Where staff have heavy luggage that can't be taken on public transport
- Where there's no suitable or cost-effective alternative method of public transport
- For the personal safety of employees, e.g. when traveling after dark in certain circumstances
- Where a group of employees are traveling together, resulting in lower costs than buying individual tickets
- When pre-arranged with the person responsible for authorising expenses in the case of illness, injury, disability, pregnancy or related factors

3.3 Personal vehicles and mileage

Employees may use their own vehicle for travel for business purposes, where it is convenient and cost effective, and subject to the vehicle being safe, legal to drive, and having the appropriate insurance cover in place.

St Francis CMAT will cover relevant expense claims for:

- Tolls and congestion charges
- Reasonable parking costs including car parking incurred when visiting the Trust Offices
- Mileage, in line with current HMRC rates for travel

When calculating mileage expenditure, employees should use the distance travelled for business purposes. If setting out from home, the distance that would usually be travelled under ordinary commuting should be deducted. Claims must be submitted within one month not rolled over to the year end.

St Francis CMAT will not cover the costs of:

- Vehicle insurance
- Fines (e.g. traffic offences, parking fines, wheel clamping unlocking)

4.0 Accommodation and Subsistence

4.1 Accommodation

If an employee requires overnight accommodation for business purposes, wherever possible a room should only be booked to a maximum cost of:

- £100 for outside of Greater London
- £150 for in Greater London

The school or trust will not meet the costs of any extension to the stay for personal reasons, or for accommodation for individuals other than the employee, for instance a partner, friend or family member.

4.2 Subsistence

Where employees are working away from their usual place of work and meals are not provided, they may claim reasonable subsistence costs up to a maximum of:

- £5 for more than 5 hours
- £10 for more than 10 hours
- £13.80 for more than 12 hours
- £21.25 for more than 24 hours

St Francis CMAT will not reimburse the purchase of any alcohol.

5.0 Other Expenses

The person responsible for approving expenses (see section 2.1) may approve other categories of expenses occurred while on the business of St Francis CMAT, on a case-by-case basis.

As a general rule, employees **cannot** claim on expenses for the following costs:

- Items which should be obtained through the school's procurement processes (e.g. IT, stationery)
- Internet connection
- Telephone and mobile expenses
- The cleaning of uniforms/equipment
- Greetings cards, gifts and flowers for employees or contractors
- Staff entertainment

Please note that the above list is not exhaustive and St Francis CMAT may amend this list from time to time.

6.0 Process for claiming expenses

Wherever possible, employees must seek approval from the person responsible for approving their expenses (see section 2.1) before incurring them, in writing via e-mail. In most cases, this will be the headteacher. This is especially necessary for expenses which may fall outside of the categories or spending limits set out in this policy. Any failure to seek prior approval before expenses are incurred may result in St Francis CMAT withholding reimbursement of the expenses.

Employees must keep all receipts and proofs of purchase for incurred costs.

To claim expenses, employees must:

- Input onto Manage HR.
- Attach all relevant documents (e.g. receipts or tickets)
- Submit the Manage HR form and relevant receipts to the person responsible for approving their expenses (see section 2.1) within 7 days of the expense being incurred
- If approved, the employee will receive reimbursement in the pay packet following approval.
- In the case of disagreement about whether an expense should be approved, the case may be escalated to the Trust by e-mailing finance@stfranciscmat.com

7.0 Monitoring and review

The Finance Director to monitor the implementation of this policy, including making sure it is updated to reflect the needs and circumstances of the Trust.

This policy will be reviewed annually.

The Trust Board is responsible for approving this policy.