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2024/2025 Expenses Policy

Building foundations and providing opportunities to create confident, aspirational, and independent members of our community.

Approved by Governing Body on:	3/12/2024
Signed by Chair of Governors:	<i>P. A. Evans</i>
Head Teacher:	O M Flowers
Lead Personnel:	G Davies/A Gibson
Date of Review:	3/12/2026

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1. Introduction

At The Westminster School, staff may claim reimbursement for reasonable expenses incurred wholly, necessarily and exclusively in the course of the business of the school. These may arise from attending meetings, training or conferences, or purchases made on the school's behalf. Any purchase made 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.

2. Claiming Expenses

Payments for the personal expenditure of staff must be made using a Staff Expenses Claim Form or Staff Mileage form as appropriate.

The purchase of classroom equipment and items should normally be completed using the purchase ordering system and paid for directly by the school. A Staff Expenses Claim Form may be used for reclaiming the cost of such purchases on occasion and if approved by the budget holder **in advance of the purchase being made**.

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. All items purchased over the internet, must show the delivery address as the school address, any claims without the correct support documentation will not be paid.

Claim forms must be approved and signed by the budget holder in accordance with the Scheme of Financial Delegation

Claims by SLT must be authorised by the Chair of Governors.

Claims which do not meet approval will not be processed and will be returned.

The submission of false claims will be treated as a fraud and will lead to disciplinary action.

3. 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. These will be treated as benefits-in-kind and taxed accordingly.

4. Travel Expenses

Payment for mileage will be paid at the prevailing rate in the local authority in which the school is situated.

Staff are encouraged to car pool where possible and sharing is expected where staff start from and return to the same location after making the same visit.

An SMBC Car Registration Form to claim care allowances must be completed by the staff member in advance of the first trip. This must be supported by a copy of the staff member's business insurance certificate. This Form will be authorised by the Head Teacher. A copy of this will be kept on file and staff must update this with any change of vehicle or personal details (eg name change). Business insurance renewal documents must be submitted to the school Finance Office to ensure records are kept up-to-date.

The date of, reason for, starting point and destination of the journey should all be shown on the Mileage Claim Form. Claims should be submitted monthly. Claims submitted over 3 months after the expense was incurred or relating to the previous financial year will not be paid. The Head Teacher must authorise all claims before payment will be made.

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Parking fines or speeding fines will never be reimbursed. Toll road charges may be reimbursed if the budget holder's permission has been granted before the journey is made.

Business mileage will never be paid for a journey from home to a normal place of work.

If a journey starts at home or finishes at home, the mileage claimed should be the lesser of the distance actually travelled compared to normal home to work mileage.

5. 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 (business use insurance) prior to travel.

Staff must also ensure that the car is safe and legal to drive.

6. Travel by Public Transport

The use of public transport for eligible journeys will be reimbursed upon receipt, provided the expenses are reasonable. Staff should ensure they travel by the most economical method bearing in mind both the cost and travel time.

Staff should use the most economical class of travel. Generally, this is standard or economy class unless the cost of first class is at the same cost. If a member of staff wishes to travel first class they may do so on reimbursement to the school of the difference in the fare.

Train travel must be booked through the school Finance Office, and must be approved in advance by the Head Teacher. Train tickets will be emailed directly to staff. Staff must not organise or pay for train travel themselves.

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.

7. Cost of Meals and Accommodation

The cost of meals purchased by staff required to work at a location away from their home or the normal place of work may be claimed. No reimbursement will be made for an activity or visit where the staff member normally have provided their own lunch **e.g. school trips**. However, the cost of meals will be paid when on a course or otherwise away overnight.

Reasonable expenses for the cost of food and drink when working away will be reimbursed when supported by receipts. Clarification should be obtained from the Finance Officer, as to what is reasonable if there is any doubt.

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. A limit of £85.00 per person, per night will apply for hotels, with the exception of when staying in London when £120.00 per person, per night will apply. Only the Head Teacher can authorise any stay outside of these rates and will only do so in exceptional circumstances.

Accommodation must always be pre-booked through the school Finance Office as there is an account with Premier Inn.

Personal items, such as alcoholic drinks, mini-bars, newspapers, movies etc. will not be reimbursed and their total should be deducted from any bills submitted for expenses purposes.

8. Telephone and Mobile Expenses

Business calls made from a home telephone or personal mobile phone may be reimbursed subject to provision of an itemised telephone bill and their inclusion on the Staff Expenses Claim Form. Line or equipment rental will not be reimbursed.

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The School provides mobile phones for operational purposes and to some senior staff. Such phones can be used for personal use (for example to let someone know you will be late home) on occasion but bills will be monitored and any excessive personal use will need to be reimbursed.