

St Ralph Sherwin
Catholic Multi Academy Trust

Staff Expenses Policy

Version 7
October 2026

One of three Catholic Multi Academy Trusts in the Diocese of Nottingham

St Ralph Sherwin
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Document Provenance

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4.0	15/03/2022	PB suggested changes
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6.0	28/04/2026	Alignment with ATH 2025
7.0	14/10/2026	Updated reference to ATH, mileage claims, meal claim limits

'If one of you is planning to build a tower, you sit down first and figure out what it will cost, to see if you have enough money to finish the job.'
Luke 14:28

1. Introduction, Purpose and Objectives

1.1. The intention of this policy is to set out requirements to staff claiming expenses so that they can ensure that only expenditure that is wholly, necessarily and exclusively incurred whilst engaged on Trust business is claimed and reimbursed.

1.2. The policy sets out the examples of expense categories against which staff can make expense claims, the manner of their approval and sets some limits for expenditure. However, all expense claims will be reviewed by the Trust's Finance Team, who will have the ability to approve or reject claims according to the specific circumstances and to ensure compliance with the Academy Trust Handbook 2025 is achieved.

1.4. It is the responsibility of the claimant to only make claims for expenses that meet the criteria and that are within the limits set out in this policy. It is the responsibility of the person authorising a claim to thoroughly check its compliance.

1.5. Limits within this policy will apply to all staff, except where conditions in employment contracts differ, in which case the employment contract will prevail.

2. Scope and responsibilities

2.1. This policy is owned by the Trust's Finance and Estates Committee and will be adopted by each academy but will be implemented by the Chief Financial Officer across the Trust on a day-to-day basis.

2.2. Policies and procedures implemented by the Trust are in place to control the organisation's exposure to risks identified within the risk register. All staff should take appropriate steps to make themselves be aware of this and all policies of the Trust and the procedures in place including any updates issued from time to time. Should staff have any queries relating to this or any other policy or procedure they should contact the Trust's Governance Lead who will provide guidance and where appropriate, training.

2.3. This policy applies to all staff and external contractors employed by the Trust.

2.4. Trustees/Foundation Directors and Governors are covered by a separate policy.

3. Legislation and Regulation

3.1. The Trust has a responsibility to manage its financial resources in accordance with the Department for Education (DfE) Academy Trust Handbook 2025 which sets out mandatory requirements for regularity, propriety and value for money as a condition of the Trust's funding agreement.

4. Allowable expenses

4.1. All expense claims must comply with the principles of regularity, propriety and value for money, as defined in the Academy Trust Handbook 2025 and HM Treasury's Managing Public Money guidance. No claim will be reimbursed where expenditure is considered irregular, improper, excessive or does not demonstrably represent value for money, regardless of prior approval.

4.2. The following sections identify several anticipated business expenses that employees might incur, though provision is made in the final line as a catch-all.

4.3. Where limits are included below, these are maximum amounts, and do not represent authority to spend up to these levels on every occasion. Employees must always ensure that expenditure is appropriate, reasonable and represents value for money, and take advantage of special rates and discounts wherever possible.

4.4. Where maximum amounts are exceeded, authority for the expense should be sought by the approver from the Chief Financial Officer. If it is known or expected that financial limits may be exceeded before expenditure is incurred, approval should be sought in advance.

4.5. **Travel**

- Mileage claims must be net of any mileage that is travelled from your home to your normal place of work.
- The expense claim form has the HMRC approved rates built into it, but for information purposes, at the time of writing, these are 45p per mile up to 10,000 miles and 25p per mile thereafter. An extra 5p per mile may be claimed for a passenger. Motorcycle and bike rates (where relevant) are 24p and 20p per mile respectively.
- Employees are responsible for having adequate insurance cover for business use and must submit a copy of this annually.
- Any public travel should be via standard/economy class unless it is demonstrably cheaper via first-class due to a promotional offer.

- If an employee chooses to travel at a higher class, they can do so but must pay the differential and provide support for the lower amount reclaimed.

- Where practicable, staff should use Senior Railcards or any other discount card to which they are entitled.

- If employees have Season Tickets or Travelcards that cover part of their business journey, only the additional cost from that covered by the existing ticket may be claimed.

- Taxis and minicabs 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;
  – this list is not intended to be exhaustive.

- Car hire can be organised for specific occasions where merited but must be agreed with the Chief Financial Officer in advance and must be more cost effective than the alternatives, likely because of several employees making the same trip. Petrol cost rather than a mileage claim should be made in this instance.

- Car parking can be reclaimed, care should be taken to minimise the period claimed.

- Toll road charges can be reclaimed where this is deemed reasonable by the approver but will be subject to review by the Finance Team.

- Fines, penalties or charges arising from breaches of traffic or parking regulations, including but not limited to parking tickets, speeding fines, congestion charges incurred through non-compliance, penalty charge notices (PCNs), or similar sanctions, are strictly personal liabilities and must not be claimed or reimbursed under any circumstances. This applies regardless of whether the employee was engaged on Trust business at the time the fine or penalty was incurred

4.6. **Meals**

- Employees may claim for the reasonable cost of ***meals*** purchased whilst working away or if required to work late by their line manager. We apply HMRC approved rates for this as follows:

Period of Attendance	Maximum Claim Limit
Breakfast allowance for a duty of more than 4 hours concluding before 12 noon	£5
Lunch allowance for a duty of more than 4 hours concluding after 12 noon	£10
Dinner allowance for a duty of more than 4 hours concluding after 6pm	£15
(Receipts must be submitted to support all claims)	

- The Limitations on Reimbursement are:
  o Attendance of more than 4 but less than 8 hours, the cost of 1 main meal
  o Attendance of 8 hours or more but less than 12 hours, the cost of 2 main meals
  o Attendance of 12 hours or more, the cost of 3 main meals

- ***Alcohol*** may never be claimed

4.7. **Accommodation**

- Overnight stays are likely to be limited given the geographical proximity of our Trusts however, it is recognised that lengthy journeys before or after an event on the same day are not always conducive to good productivity, or even safety of staff if travelling by car. As such, these are not prohibited, but agreement from the Chief Financial Officer should be sought in advance.

4.8. **Other**

- The cost of business calls made on a personal phone may be reimbursed where the phone is on a "pay as you go" contract, or a monthly payment plan where the business calls result in the monthly limits being exceeded. Employees expected to make and receive business calls on a regular basis will be provided with a company mobile phone.

- At the Chief Financial Officer's discretion, the Trust will contribute in whole or in part to an employee's relevant professional subscriptions.

- Other items not specifically mentioned above (including childcare) may be reimbursed at the Chief Financial Officer's discretion – clearance in advance is required.

5. Reclaiming Expenses

5.1. **Mileage Claims**

- All mileage claims must be submitted through the Employee Self Service (ESS). Claims submitted outside of ESS will no longer be accepted.
- Step-by-step guidance on submitting mileage claims via ESS is available in the Company News section on the home page. There is also guidance available on iTrent for People Managers in the latest Company News section.
- Mileage claims will now be approved by the reporting manager recorded for you in iTrent. Please ensure your reporting manager details are correct. You can view the reporting manager for your role on ESS by clicking into Employment, then selecting the relevant role. You will see your reporting manager at the bottom of the screen.
- Mileage claims will now be paid via payroll, rather than by a separate BACS payment.
- As mileage claims will now be processed through payroll, claims must be submitted and approved by the payroll cut-off date to ensure payment in that pay period. Claims submitted after the cut-off will be paid in the following payroll run. We recommend submitting claims as early as possible to avoid delays.

5.2 **Completion of Expenses Claim Form**

- Claims should be made via the form available from the finance department.
- Claims should not only indicate the items or services provided, but also indicate the purpose of the purchase or event to which it relates in the "Reason for Attendance" column.
- VAT receipts must be attached to expense claims and Procurement Card statements, the only exceptions being travel by public transport and cabs, where VAT receipts are not normally produced.
- If VAT receipts are not attached to a claim, no payment will be made other than exceptional circumstances, and the reason for the lack of attaching a receipt must be stated on the claim (e.g. wallet stolen).

5.2. **Approval**

- Staff in academies should have their expenses approved by the Headteacher.

- Central Staff below the Executive Team should have expenses approved by a member of the Executive Team or the Senior Executive Team.

- Executive Team members should have expenses approved by a member of the Senior Executive Team.

- The CEO should approve the Chief Financial Officer's expenses.

- The Chief Financial Officer should approve the CEO and other Senior Executive Team members' expenses.

5.3. **Procurement Cards**

- These are another means of paying for goods and services, and employees should ensure that purchases made via these comply with the Competitive Tendering Policy and this Expenses Policy **and the principles and requirements of the Procurement Act 2023, as referenced in the Academy Trust Handbook 2025.**

6. Other considerations

6.1. In exceptional cases, cash advances may be available to meet specific anticipated expenditure. Applications should be made in advance and be approved by the Chief Financial Officer.

6.2. Where it has been established that expenses have been claimed that are contrary to this policy or the Academy Trust Handbook 2025, and have not been correctly approved, the sums involved will be recovered from employees.

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

7. Monitoring, compliance and review

7.1. The Finance and Estates Committee has overall responsibility for monitoring and reviewing the impact of this policy and making recommendations for updates and revisions as needed, or when there are changes in regulations and legislation to which the Trust must respond.

7.2. The Finance and Estates Committee will review and sign off this policy every three years unless there are regulatory and legislative changes necessitating an earlier review.