



Southwark Diocesan
Board of Education
Multi-Academy Trust

STAFF EXPENSES POLICY

Part of the 2025/2026 Trust Operating Manual

STAFF EXPENSES POLICY

Contents

1. INTRODUCTION.....	2
2. TRAVEL EXPENSES.....	2
3. OTHER EXPENSES.....	2
4. MISCELLANEOUS EXPENSES.....	3
5. HOW TO CLAIM EXPENSES.....	3

STAFF EXPENSES POLICY

1. INTRODUCTION

- 1.1 All staff employed by Southwark Board of Education Multi-Academy Trust (SDBE MAT) may claim reimbursement in respect of actual expenditure incurred by them arising from attending meetings, training and conferences and purchases made on behalf of their academy.
- 1.2 Claims must be made within 60 days of the cost being incurred.
- 1.3 Throughout this policy, the term 'Senior Leader' includes the Academy's Chair of Governors, Headteacher or member of the school's leadership team. In the case of Trust Central staff, the Chief Executive are classed as Senior Leaders.

2. TRAVEL EXPENSES

- 2.1 Staff are expected to make use of public transport where it is available, unless its use results in considerable inconvenience, expense or if it is not a viable option due to a disability or the need to take equipment or passengers.
- 2.2 All staff are encouraged to undertake car-sharing where possible and when travelling to the same venue.
- 2.3 When using their own vehicle in the course of their employment, staff must ensure that their car insurance policy covers business use. They must also ensure that the car is safe and legal to drive.
- 2.4 Academy staff must obtain agreement from a Senior Leader in advance for any journeys being undertaken for which a claim will be made.
- 2.5 Individuals are free to determine the method of travel which they choose to use but should do so in the knowledge of the basis which will be used for calculation of reimbursement. The decision as to whether public transport is impractical should be taken by an appropriate Senior Leader.
- 2.6 Decisions should be made in a fair and equitable manner to ensure fair treatment of staff within the Academy and throughout the Trust.
- 2.7 Rail fares: the actual cost incurred for standard return second class tickets will be reimbursed. Staff should seek the lowest fare available for the journey and the time of day. Where the journey, on a single train, will be greater than two hours and employees are able to undertake specific work tasks whilst traveling, consideration will be given to purchasing first class tickets if the additional cost over a standard fare is not unreasonable.
- 2.8 Wherever feasible, advance booking should be used to secure the cheapest fare. However, Senior Leaders should not unreasonably withhold full reimbursement when it has not been possible to book in advance.
- 2.9 Used tickets or a receipt are required for a claim to be accepted.
- 2.10 Bus and underground fares: expenses can be claimed as incurred. Staff should register their Oyster cards online and provide a printout showing journeys made.
- 2.11 Where travel by public transport is impractical, the rate of reimbursement for car mileage will be at a fixed rate as determined by the Inland Revenue rate (currently 45p per mile).
- 2.12 Staff can also claim an additional allowance of 5p per passenger per business mile for carrying fellow employees in a car or van on journeys which are also work journeys for them.
- 2.13 Mileage will be calculated according the shortest route to and from the required destination (deducting any mileage that would normally be covered travelling to and from the place of work).
- 2.14 When travelling by car, free parking is usually available for most destinations within a reasonable walking distance. Car parking will only be reimbursed were this in not possible. Car parking will not be reimbursed if also claiming public transport.

3. OTHER EXPENSES

- 3.1 A member of staff attending a meeting, training conference, or another school, which involves a need for overnight accommodation may be entitled to be reimbursed for reasonable costs incurred for accommodation.

STAFF EXPENSES POLICY

- 3.2 If the Trust or Academy is to cover the cost of accommodation, then this has to be agreed by a Senior Leader before any cost is incurred.
- 3.3 The recommended accommodation should be equivalent to a three-star standard or less and should be no greater than £120 per night in a major city and £100 elsewhere.
- 3.4 Where it is not possible to obtain accommodation within the outlined limits, the CEO is authorised to make exceptions based on the needs of the Trust.
- 3.5 Once the costs have been sanctioned, and before they are actually incurred, the appropriate purchase order needs to be raised so that the cost can be allocated within the budget.
- 3.6 In deciding, the Senior Leader will consider the following points:
 - (a) Is it necessary to attend the event at this venue?
 - (b) Is there a clear benefit to the Academy/Trust by having the member of staff attending the event?
 - (c) If the benefit in attending is solely for the member of staff's own personal development, then reimbursement cannot be considered.
 - (d) How long is the travelling time from to the venue using the fastest mode of transport?
- 3.7 If the journey time is not considerable, then payment of overnight accommodation will not be considered. If, however, attendance at the venue is required for several consecutive days, but the journey time criteria are not met, consideration should be given for paying for overnight accommodation, if this would be more cost effective than paying for daily travelling costs.
- 3.8 Where overnight accommodation has been agreed, a member of staff is also eligible to claim for meals as follows:
 - (a) For breakfast and lunch, up to £15 for each meal can be claimed.
 - (b) For dinner, cost up to £25 can be claimed
 - (c) The costs claimed for meals is inclusive of non-alcoholic drinks.

!! IT IS EXPLICITLY FORBIDDEN TO PURCHASE ALCOHOL USING ACADEMY FUNDS !!

4. MISCELLANEOUS EXPENSES

- 4.1 The Trust/Academy provides mobile phones only where a specific operational need arises.
- 4.2 It is the policy that no private use is made of such mobile phones except in emergencies.
- 4.3 Staff members will be required to reimburse the Academy for the costs of any non-emergency private calls.
- 4.4 The Trust will not reimburse staff for the use of private mobile phones but will meet the actual cost of business calls made on private phones subject to evidence of the calls being provided with the staff claim form.
- 4.5 Purchases made on behalf of an Academy (e.g. perishable items for cookery) must be approved by the budget holder prior to purchase.
- 4.6 If prior approval has not been obtained from the budget holder the Trust/Academy reserves the right not to reimburse the cost.
- 4.7 If, when using the Academy minibus, a member of staff incurs a penalty charge notice the cost will not be reimbursed.
- 4.8 This will also be the case if the minibus is being used for business purposes unless there are extenuating circumstances.

5. HOW TO CLAIM EXPENSES

The procedure for claiming expenses is as follows:

- 5.1 Complete the relevant expense form and attach supporting evidence of expenditure e.g., receipts or bills.

STAFF EXPENSES POLICY

- 5.2 Ensure it is appropriately authorised either by Senior leader or other authorised member of staff.
- 5.3 Finance staff will process the expenses claim on Access system (The Trust finance system) and the claims will be included in the 'Supplier's payment run. All claims by staff members will be paid via BACS.