



EVERYONE MATTERS  
SCHOOLS TRUST

# Expenses Policy

## Everyone Matters Schools Trust Central Policy



<b>Policy Owner</b>	CEO and Trustees
<b>Scope of the Policy</b>	Trust wide
<b>Last reviewed by trustees</b>	<b>September 2025</b>
<b>Next review due</b>	<b>September 2028</b>
<b>Summary of key changes</b>	No changes
<b>Committee Responsible</b>	FAR

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HEAD OFFICE  
HIGHER LANE RAINFORD ST HELENS  
MERSEYSIDE WA11 8NY  
COMPANY NO: 10455406 10455406

## 1 SCOPE AND PURPOSE

- 1.1 This policy deals with claims for the reimbursement of expenses.
- 1.2 The purpose of this policy is to:
  - 1.2.1 Define the School's policy and procedures relating to travel on school business and related expenditure;
  - 1.2.2 Provide guidance on the types of expenditure that can and cannot be reimbursed by the Trust; and
  - 1.2.3 Inform staff and those approving expenses of their responsibilities.
- 1.3 This policy does not form part of any employee's contract of employment and the **School** may amend it at any time.

## 2 WHO IS COVERED BY THIS POLICY?

This policy covers all employees at all levels and grades including senior managers, employees, trainees, part-time and fixed term employees undertaking travel and associated activities and incurring personal expenses in the course of their employment. This policy will also apply to persons who are not employees but are travelling on the official business of the **School** (e.g. governors/trustees) and to whom permission has been expressly granted to recover expenses under this policy (collectively referred to as **staff** within this policy).

## 3 WHO IS RESPONSIBLE FOR THE POLICY?

- 3.1 The **Trust** has overall responsibility for the effective operation of this policy and for ensuring compliance with any statutory framework.
- 3.2 The **Trust** has delegated day-to-day responsibility for operating the policy and ensuring its maintenance and review to the Principal / Headteacher. The Principal / Headteacher has a specific responsibility to ensure the fair application of this policy and all members of staff are responsible for ensuring its success.

## 4 REIMBURSEMENT OF EXPENSES

- 4.1 The School will reimburse expenses properly incurred in accordance with this policy.
- 4.2 Where expenses must be authorised before they are incurred it will be clearly stated within this policy together with information as to who can authorise them. If an expense is not clearly covered by this policy then authorisation must be obtained from the Principal / Headteacher before it is incurred (in the case of the Principal / Headteacher authorisation must be obtained from the Chair of the Governing Body/Chair of Trustees/Chief Executive Officer).
- 4.3 Expenses will only be reimbursed if they are:
  - 4.3.1 claimed using forms that are available from the school office and submitted to an authorised signatory of more senior status, normally an individual's line manager (claims by the Principal / Headteacher must be authorised by the Chair of the Governing Body/Chair of Trustees/Chief Executive Officer)
  - 4.3.2 submitted within **three** months of being incurred;
  - 4.3.3 supported by relevant itemised documents where possible (for example, VAT receipts, tickets, and credit or debit card slips); and

- 4.3.4 where required, authorised in accordance with instructions in force at the time the expense was incurred.
- 4.4 Claims for authorised expenses submitted in accordance with this policy will be paid directly into a member of staff's bank/building society account.
- 4.5 The purchase of classroom/office equipment and sundries must be affected using the requisition/purchase ordering system and paid for directly by the School. As such, an expense claim must not be submitted under this policy for the costs of such purchases.
- 4.6 Claims which have not been approved in compliance with this policy will not be processed and will be returned. Self-authorised claims will not be accepted for payment under any circumstances and if a member of staff attempts to submit a false claim it will be treated as a serious matter which may lead to disciplinary action.
- 4.7 Any questions about the reimbursement of expenses should be put to an individual's Line Manager before the relevant costs are incurred.

## 5 TRAVEL EXPENSES

- 5.1 The School will reimburse the reasonable cost of necessary travel in connection with School business. The most economic means of travel should be chosen if practicable/possible. The following are not treated as travel in connection with School business:

- 5.1.1 travel between a member of staff's home and usual place of work;
- 5.1.2 travel which is mainly for a member of staff's own purposes;
- 5.1.3 travel which, while undertaken on the School's behalf, is similar or equivalent to travel between a member of staff's home and usual place of work;
- 5.1.4 travel costs associated with non-mandatory full-time or part-time academic courses or professional qualifications; and
- 5.1.5 travel costs incurred by Trustees for attending meetings (unless the meeting is being held at an alternative site).

### 5.2 Trains

Staff will only be reimbursed for the cost of standard class travel. A receipt should be obtained for submission with an expenses claim form.

### 5.3 Taxis

Staff should not take a taxi when there is public transport that would not greatly increase the journey time. However, where it is cost effective or more practical (e.g. several people travelling; time constraints; for reasons of personal security; heavy luggage), staff can travel by taxi may be permitted. A receipt should be obtained for submission with an expenses claim form.

### 5.4 Car

- 5.4.1 Where it is cost effective or more practical for a member of staff to use their own car for business travel (e.g. several people travelling; time constraints; for reasons of personal security; heavy luggage), and they have been authorised to do so, staff can claim a mileage allowance on proof of mileage in accordance with the current authorised mileage rates authorised by HM Revenue & Customs. Details of the current mileage rates can be obtained from the finance office. Staff can also claim

for any necessary parking costs which need to be supported by a receipt or the display ticket.

- 5.4.2 Any vehicle used to travel on School business must be insured for business travel purposes. A member of staff can be required to evidence this on request.

## 5.5 **Air travel**

5.5.1 If staff are required to travel by plane in the course of their duties they should discuss travel arrangements with the Principal / Headteacher in advance. Where possible, arrangements will be made by the School on the member of staff's behalf but where this is not possible staff will be advised of the documentation that they will need to submit to reclaim expenses.

5.5.2 The School will not reimburse any penalty fares or parking fines or driving offences that staff may incur while travelling on School business.

## 6 **ACCOMMODATION AND OTHER OVERNIGHT EXPENSES**

6.1 If staff are required to stay away overnight in the course of their duties they should discuss accommodation arrangements with the Principal / Headteacher in advance. Where possible, arrangements will be made by the School on a member of staff's behalf, but where this is not possible the member of staff will be advised of the documentation that they will need to submit to reclaim expenses.

6.2 When staff are required to stay away overnight in the course of their duties, to the extent that these are not included in the cost of accommodation, the School will reimburse their reasonable out-of-pocket expenses provided they are supported by receipts for the following:

6.2.1 breakfast up to a maximum of £15 a day;

6.2.2 lunch and an evening meal including non-alcoholic drinks up to £5 a day for lunch, £20 a day for an evening meal or, where both are incurred on the same day, an overall maximum of £25

6.3 For the avoidance of any doubt, when the cost of attending an event (such as a conference) involving an overnight stay includes the cost of accommodation and/or meals, additional claims under this policy should not be made for those items.

## 7 **ENTERTAINING VISITORS**

7.1 Staff may entertain visitors and guests where it is within budgetary limits and prior approval has been given by the Principal / Headteacher in accordance with the School's Anti Corruption and Bribery Policy.

7.2 All claims must be supported by relevant itemised documents (for example, VAT receipts, tickets, and credit or debit card slips) and a list of attendees.

## 8 **GOVERNOR/TRUSTEE RELATED EXPENSES**

The school considers the following as legitimate Governor/Trustee expenses, where supported by relevant itemised documents:

8.1.1 communication support (e.g. translating documents into Braille for a blind Governor/Trustee, provision of alerting and listening devices, and other special aids for people with a hearing impairment);

8.1.2 providing special transport, equipment or facilities for a Governor/Trustee with a disability;

- 8.1.3 cost of reasonable overnight accommodation and subsistence (in line with this policy) while attending Governor/Trustee meetings or specialist conferences and training courses held at a location other than their respective school.

## 9 **DISCRETIONARY PAYMENTS**

There may be expenditure not covered by this policy or incidences where a legitimate claim is over and above the parameters established in this policy. In such cases these must be agreed in advance with the Chair of the Governing Body/Chair of Trustees/Chief Executive Officer.