

The Bishop Wheeler Catholic Academy Trust



Policy

Staff Expenses

Published: December 2017

To be reviewed: 2020-2021





Our Mission

The school communities of The Bishop Wheeler Catholic Academy Trust will work together in truth and love to provide the best possible opportunities for all our young people and their families.

Our mission is the provision, development and future safeguarding of a World Class Catholic Education where every child, member of staff and family matters

The schools, their governors and the trust directors will work together, based on the principle of subsidiarity, in faithfulness and humility, to provide an education where Christ and His values of respect, service, tolerance, dignity and forgiveness are at the heart of everything we do.

This policy was adopted by the Trust Board

Signature:

Mrs C Hyde
Chair of Trust Board

Date:

6.12.17

THE BISHOP WHEELER CATHOLIC ACADEMY TRUST

STAFF EXPENSES POLICY

Bishop Wheeler employees may need to travel in connection with work and will be reimbursed for travel costs incurred wholly, necessarily and exclusively in the course of the Trusts business. The Bishop Wheeler Catholic Academy Trust is committed to supporting sustainable travel and best value for money. This policy should be referred to in conjunction with the Trust's travel expense claim form, which is available on the individual Academy's websites or via finance administration staff.

Any purchase made on behalf of the school 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.

Travel Expenses

Home to work travel

Costs associated with travelling to and from an employees' home and their place of work is **not** reimbursable. Travel claims must identify costs incurred to and from their place of work. Some employees may have multiple places of work within the Trust, identified in their contract of employment. Therefore, their 'place of work' may vary.

Car and Motorcycle

Employees who are driving must hold a full and valid driving licence, with current vehicle insurance and MOT certificate.

The authorised reimbursement rate per mile is 0.45p. This is the non-taxable rate approved by HMRC. This rate applies up to 10,000 miles per financial year, thereafter at the rate of 0.25p per mile.

Vehicle Insurance - The Trust does not provide car insurance for staff using their own vehicles. Staff members are responsible for ensuring they are appropriately insured prior to travel. The cost of business insurance is reflected in the above reimbursement rate, which also covers general wear and tear of the vehicle as well as fuel.

Parking - Please ensure that a receipt is retained and the cheapest available option is utilised.

Use of Public Transport

The use of public transport for eligible journeys will be reimbursed upon receipt, provided expenses are reasonable – if the journey can be pre-planned staff must book the journey through the administration team.

Staff should use the most economical class of travel – standard or economy class.

Taxis - should only be used as a last resort, when no other public transport options are available or practical. Please retain a receipt

Subsistence Costs

Employees are eligible to claim subsistence expenses when they are required to work away from their place of work, where meals are not provided. Subsistence claims will not be reimbursed for overtime working.

The Bishop Wheeler Catholic Academy Trust is a charity and a company limited by guarantee, registered in England and Wales

Company Number: 8399801

Registered Office: St. Mary's Catholic High School, Bradford Road, Menston, LS29 6AE

Telephone Number: 01943 883000

Lunch

In most cases it is assumed lunch would be provided, however should the period of business include an overnight stay and lunch is not provided, up to £7.50 maximum can be claimed.

Dinner

£15.00 maximum.

Accommodation

Overnight accommodation must be booked through the Academy's finance office. It is assumed that the cost of breakfast will be included. Accommodation should be booked in advance wherever possible, taking advantage of reduced cost websites.

Allowances:

Outside London: up to a maximum of £75 per person per night, including VAT and breakfast

London: up to a maximum of £150 per person per night including VAT and breakfast.

Headteachers may apply discretion should accommodation costs be unavoidably more expensive.

Exclusions

- Alcohol is not reimbursable.
- Fines and penalties are the sole responsibility of the employee.

Submission of Claims

1. All relevant VAT receipts, including fuel receipts, must be attached to the claim form. If a receipt is unavailable then the claim will not be reimbursed.
2. Expense claims should be submitted **monthly**, at the discretion of the Headteacher for exceptional circumstances.
3. Reimbursement will be made by bank transfer. Employees should ensure that the finance office have correct bank account details.
4. Claim forms must be authorised by the Headteacher.

Payment of claims may be withheld if the journey has not been correctly authorised, in line with the Academy's procedures, by the Headteacher.

 The 10 schools in our Trust:

St. Mary's Menston, a Catholic Voluntary Academy
St. Joseph's Catholic Primary School Otley, a Voluntary Academy
Ss Peter and Paul Catholic Primary School, a Voluntary Academy
Sacred Heart Catholic Primary School Ilkley, a Voluntary Academy
St Mary's Horsforth Catholic Voluntary Academy
St. Joseph's Catholic Primary School Pudsey, a Voluntary Academy
St Joseph's Catholic Primary School Harrogate, a Voluntary Academy
St Mary's Catholic Primary School Knaresborough, a Voluntary Academy
St. Stephen's Catholic Primary School and Nursery, a Voluntary Academy
Holy Name Catholic Voluntary Academy



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A Catholic Voluntary Academy
Bradford Road
Menston
LS29 6AE

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Chair of the
Trust board: Mrs C Hyde

Vice Chair of the
Trust Board: Mrs D Gaskin