

Title	Staff Expenses Policy
Associated Policies	

**REVIEWED: September 2024**

**NEXT REVIEW: September 2027**

## 1. Policy Statement

- 1.1 The Brooke Weston Trust is committed to ensuring that there is transparency and openness in terms of how it uses government funding to advance education. Academy employees should not be out of pocket and should be able to claim reimbursement for legitimate expenses incurred in carrying out their duties.
- 1.2 The Brooke Weston Trust aims to ensure sufficient internal controls are in place to ensure appropriate levels of authorisation are obtained in respect of reimbursed expenditure.
- 1.3 It will be expected that employees will be aware of the need to minimise the costs of travel, subsistence and incidental expenses.

## 2. Who does this policy apply to?

- 2.1 This policy applies to all employees of the Academy and of the Brooke Weston Trust.

## 3. Who is responsible for implementing and reviewing this policy?

- 3.1 It is the responsibility of all Academy employees to follow the procedure for claiming expenses outlined in this policy.
- 3.2 The implementation of this policy will be monitored by The Brooke Weston Trust and remain under review by The Brooke Weston Trust.

## 4. Procedure

- 4.1 Whenever an employee wishes to claim back costs incurred on behalf of the Trust, **appropriate proof of payment must be provided**. In all cases, receipts must be provided to support claims.
- 4.2 The Trust will reimburse staff for all reasonable expenses necessarily incurred in the performance of their duties, such as mileage, car parking, rail fare and incidental expenditure. Consideration should always be given to using the most practical and cost-effective method of travel. Rail travel is only permitted by standard class unless a cheaper option is available. All reimbursement claims will be paid via the payroll system.
- 4.3 All claims must be made using the relevant Trust claim form.
- 4.4 Authorisation and Responsibility:
  - All employees must complete and submit expense claim forms to the School Finance Officer and HR Administrator within one month of which the travel or expenditure was incurred.
  - It is the responsibility of the employee to sign the claim form, seek authorisation for the expenditure from the relevant budget holder before the expense is incurred and to ensure the amounts claimed are justifiable and represent value for money.
- 4.5 Mileage/Travel expenditure
  - Mileage claims will only be paid for business miles undertaken on behalf of the Brooke Weston Trust or its academies, the reimbursement of personal mileage or commuting mileage are excluded.
  - Business mileage will not be payable for any journey from home to your place of work

- Business mileage will only be paid if a journey starts from your place of work and/or returns to your place of work OR if a journey starts at home or finishes at home, the mileage claimed should be less the regular commuting distance.
- The mileage allowance is 45p per mile and can be claimed on all authorised Trust journeys using the 'Staff Travel Claim Form'.
- All claims for the purchase of rail travel and car parking must be made using the 'Staff Travel Claim Form' supported by the appropriate proof of payment/receipt.

#### 4.6 Other expenditure

- **Alcohol is not permitted for purchase under any circumstances.**
- All claims for the purchase of incidentals must be made using a Staff Purchase Claim Form
- Expenditure incurred on behalf of the Trust will be reimbursed via the payroll
- All claims must be authorised by the budget holder prior to the expense being incurred.
- A VAT receipt as proof of purchase must accompany all purchases.

### 5. Policy Review

- 5.1 This policy will be monitored as part of the Trust's annual internal review and reviewed on a three year cycle or as required by legislature changes.

#### Document Control

<b>Date of last review:</b>	September 2024	<b>Author:</b>	Financial Controller
<b>Date of next review:</b>	September 2027	<b>Version:</b>	3
<b>Approved by:</b>	Strategic Delivery Group	<b>Status:</b>	Ratified

#### Summary of Changes:

**V3:** Inclusion of a reminder about the prohibition on purchasing alcohol (**section 4.6**).