



Policy: Staff Expenses Policy

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Person responsible for policy: Stephen Dean, Chief Executive Officer

Authorised by: Board of Trustees

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This Policy applies to all schools within the Primary QuEST Multi-Academy Trust. Primary QuEST is a Church of England Trust which seeks to ensure all pupils flourish, together in a supportive and caring environment.

Flourishing Together Through LIFE

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1. Aims and introduction

This policy sets out Primary QuEST rules and procedures for claiming reimbursement for expenses, including travel and accommodation, incurred wholly, necessarily and exclusively on the business of the trust or their school. Any attempt to claim reimbursement for expenses fraudulently or in breach of this policy may result in disciplinary action being taken as per Primary QuEST disciplinary policy.

It applies to all employees of Primary QuEST.

This policy does not form part of any contract of employment or other contract to provide services and Primary QuEST may amend this policy at any time.

2. Roles and responsibilities

2.1 Authorisation

EMPLOYEE CLAIMING EXPENSE	AUTHORISED BY
School staff (excluding headteachers/heads of school)	Headteacher
Headteachers, executive headteachers and trust improvement advisor	CEO
Central trust team	CEO
CEO	Trust Business Manager

In addition, members of the trust hold the following responsibilities:

2.2 Accounting officer

- › Ensure all expenses requests made to them are handled according to this policy
- › Review this policy on a biennial basis
- › Ensure compliance with all financial regulations
- › Investigate expenses claims that appear excessive or inconsistent

2.3 Headteachers

- › Ensure all expenses requests made to them are handled according to this policy
- › Ensure all school staff are aware of the procedures set out in this policy

2.4 All staff

- › Follow the procedures set out in this policy
- › Keep full records of any expenses incurred, including all receipts

3. Travel expenses

Employees are responsible for any costs incurred in journeys between their home and normal / expected place or work. This is defined as 'ordinary commuting'.

Travel beyond the normal place of work to carry out work on behalf of the school/trust is defined as travel for 'business purposes'.

Primary QuEST is committed to sustainable practices, and reducing the resources expended on travel, including staff time. As such, where possible, business travel should be avoided in favour of telephone or video calls as the first choice.

Employees should agree in advance with the person responsible for authorising their expenses (see table in section 2.1) whether the journey and chosen method of transport is appropriate.

3.1 Public transport

Employees are required to seek out the most cost-effective method of public transport for travelling on business purposes. This may include:

- › Comparing different methods of transport
- › Where possible, booking in advance to access reduced fares
- › Using any rail cards or season tickets

Employees should travel in standard/economy class unless the cost of first class is the same or less.

3.2 Taxis

Taxis may only be re-imbursed in the following limited circumstances:

- › Where staff have heavy luggage which cannot be taken on public transport
- › Where there is no suitable or cost-effective alternative method of public transport
- › To ensure the personal safety of employees, e.g. when travelling after dark in certain circumstances
- › Where a group of employees are travelling together, resulting in lower costs than buying individual tickets
- › When pre-arranged with the person responsible for authorising expenses in the case of illness, injury, disability, pregnancy or related factors

3.3 Personal vehicles and mileage

Employees may use their own vehicle for business purposes, where it is convenient and cost effective, and subject to the vehicle being safe, legal to drive, and having the appropriate insurance in place.

Primary QuEST will cover expenses claims for:

- › Tolls and congestion charges
- › Reasonable parking costs
- › Mileage, in line with [current HMRC rates for travel](#)

When calculating mileage expenditure, employees should use the distance travelled for business purposes. If setting out from home, the distance that would usually be travelled under ordinary commuting should be deducted from the total journey distance. For the central / school improvement

team a central point (either Hartpury C of E Primary School or Staunton and Corse C of E Primary Academy (which is the nearest) will be used to calculate the travel under ordinary commuting initial distance).

Primary QuEST will not cover the costs of:

- Vehicle insurance
- Fines (e.g. traffic offences, parking fines, wheel clamping unlocking)

4. Accommodation and subsistence

4.1 Accommodation

If an employee requires overnight accommodation for business purposes, wherever possible a room should only be booked to a maximum cost of

- £80 outside of Greater London
- £140 in Greater London

Any costs above these rates must be agreed with the person responsible for authorising expenses.

Primary QuEST will not meet the costs of any extension to the stay for personal reasons, or for any accommodation for individuals other than the employee, for instance a partner, friend or family member.

4.2 Subsistence

Where employees are working away from their usual place of work and meals are not provided, they may claim reasonable subsistence costs up to a maximum of:

- £10 per working day
- £25 per 24-hour period away

Primary QuEST will not reimburse the purchase of any alcohol.

5. Other expenses

The person responsible for approving expenses may approve other categories of expenses occurred while on the business of Primary QuEST on a case-by-case basis.

As a general rule, employees cannot claim for the following costs:

- Office stationery
- Internet connection
- Telephone and mobile expenses
- The cleaning of uniforms/equipment

Please note that the above list is not exhaustive and Primary QuEST may amend this list from time to time

5.1 Eye Tests and Glasses

In line with HSE guidance, the Trust will pay for the costs of eye tests for any employee who uses display screen equipment (DSE) who requests one. Costs of up to £25 may be reclaimed in line with this Expenses Policy. Where the cost is proposed to be higher, this must be agreed in advance with the line manager. The Trust will reimburse the costs of glasses for DSE work if the test shows an employee needs special glasses prescribed for the distance at which the screen is viewed.

You are eligible for 1 eye test every 2 years. If tests are required more frequently than this, a report from the optician stating this requirement and that it is due to DSE/Visual Display Unit (VDU) use must be attached to the claim.

6. Process for claiming expenses

Wherever possible, employees must seek approval from the person responsible for approving their expenses (section 2.1) before incurring them. This is especially necessary for expenses which may fall outside of the categories or spending limits set out in this policy. Any failure to seek prior approval before expenses are incurred may result in Primary QuEST withholding reimbursement of the expenses.

Employees must keep all receipts and proofs of purchase for incurred costs.

In order to claim expenses, employees must:

- Fill out the staff expenses form found in Appendix 1 of this policy
- Attach all relevant documents (e.g. receipts or tickets)
- Submit form to the person responsible for approving their expenses within six weeks of the expense being incurred

If approved, the employee will receive reimbursement in the pay packet following approval.

In the case of disagreement about whether an expense should be approved, the case may be escalated to CEO, business manager or chair of trustees.

Appendix 1: Staff expenses form

Primary QuEST

Staff expenses claim

Name:

Job title:

I request the total sum of £_____ for expenses incurred on the business of Primary QuEST as detailed below. I have attached relevant receipts to support my claim.

Signed: _____

Date: _____

Reason for visit / claim:

EXPENSE TYPE	DETAILS	COST £
Public transport		
Taxis		
Mileage for personal vehicle		
Accommodation		
Subsistence		
Other (please specify)		
Total expenses claimed		

This form should be submitted to the central team along with any relevant receipts.

The form should be submitted within 6 weeks of the expenses being incurred.

Approval

Name:

Role:

Appendix 2: Biblical underpinning for Church of England Schools

The punch line of the parable of the 'Dishonest Manager' is Jesus offering this advice, "I tell you, use worldly wealth to gain friends for yourself, so that when it is gone, you will be welcomed into eternal dwellings." (Luke 16:9).

In other words, staff members in accounting for what they spend, do so on behalf of Primary QuEST Trust. The sums spent are spent according to how you will make friends on your return to school, and with the knowledge the books will be read by God.

The early church (Acts 5) shared their goods and accounted for expenses all together. Ananias and Sapphira "kept back some of the proceeds" from the money they were handling. They were later told by their friends "you did not lie to us but to God". A member of staff expenses are part of the collective purse. The PQ policy on staff expenses was written to encourage proper accountability. God knows the numbers.

Jesus instructs his disciples to "carry no purse, bag, or sandals", emphasizing their total reliance on God's provision. Primary QuEST MAT, however, *does not* expect staff to rely on others (or God) for their provision. Jesus today calls his disciples to travel lightly and simply. A staff member should only ask in expenses that which is reasonably required. The PQ Trust does not expect staff members to become unreasonably out of pocket.