



CORPUS CHRISTI
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STAFF EXPENSES, TRAVEL & SUBSISTENCE POLICY



Document Record	
Policy title	Staff expenses, Travel and Subsistence Policy
Date approved	November 2025
Approved by	CEO
Purpose of policy	This policy sets out the arrangements for staff in the Trust claiming reimbursement for travel and subsistence, or other expenses costs incurred whilst engaged in authorised activity.
Author	CFOO
Review period	As required
Date last reviewed	November 2025

This policy will be published on the Trust's website

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1 **PURPOSE**

1.1 This policy aims to ensure that:

- (a) The funds of the Trust are used only in accordance with the law, its articles of association, its Funding Agreement and the latest DfE Academies Handbook.
- (b) Staff are able to claim expenses that have been incurred whilst engaged in authorised activity.
- (c) The level of expenses that may be claimed are fair, consistent across the Trust and reflect HMRC guidelines on National Insurance and income tax considerations.

2 **OVERVIEW**

- 2.1 The Trust respects the integrity of its employees and Directors and expects claims to be made honestly, accurately and in accordance with agreed timescales. Any attempt to falsify expenses will be considered gross misconduct and appropriate action should be expected against the claimant, and potentially authoriser if, without reasonable care, the authoriser should have recognised the fraudulent nature of the claim.
- 2.2 The claimant must seek authorisation from their manager prior to incurring costs that they will be seeking to reclaim.
- 2.3 Claims for expenses should be submitted to and approved by the claimants direct line manager and under no circumstances should anyone authorise their own claim.
- 2.4 Directors' expenses should be approved by the Chair of the Executive Committee. The Chair's and the Chief Executive's expenses should be approved by the Finance Resources, Risk and Audit Committee and a report submitted to the Audit Committee of the expenses claimed by the Directors on a termly basis.

3 **MILEAGE CLAIMS**

- 3.1 Claims for mileage incurred by school staff on Trust business should be made using the standard Expense Claim Form, authorised by the claimant's line manager and submitted to the School Business Manager for processing in Payroll.
- 3.2 Claims for Trust Central staff should be made using the standard Expense Claim Form, authorised by the claimant's line manager and submitted to the HR Team for processing in Payroll.
- 3.3 Claims should not be made for activity that was incurred more than three months of the date of claiming.
- 3.4 Claims may only be made for the distance travelled, taking the most direct route, **less** the normal distance travelled to and from work (defined as 'ordinary commuting'). For example:

Jon lives 5 miles away from his school. He has been invited to attend a briefing at a location 30 miles away. In this instance Jon may claim 25 miles each way.
- 3.5 Ordinary commuting is defined as travel between an employees' normal place of work and:-
 - (a) their home
 - (b) any other place the employee visits for non-work reasons

- (c) any place where the employee performs the duties of another job
- 3.6 The amount that staff may claim for mileage is 45p per mile for cars and 25p per mile for motorcycles.
- 3.7 Employees who use their own vehicle or a vehicle registered and insured in someone else's name, on Trust business, must ensure that the insurance covering themselves and the vehicle is adequate. The insurance cover must be sufficient to permit the employee to drive the vehicle on Academy or Trust business.
- 3.8 The Trust reserves the right to inspect at any time the claimant's:-
 - (a) DVLA Vehicle Registration document
 - (b) Driving licence
 - (c) Vehicle Insurance Certificate
 - (d) Vehicle MOT Certificate
- 3.9 Congestion and car parking fees will be reimbursed only on production of a valid receipt.
- 3.10 The Trust is not liable for any parking fines or road traffic penalties incurred by staff for any reason.

4 OTHER TRAVEL COSTS

- 4.1 Staff who travel on Trust business by other means (eg bus, tram, train, plane or taxi) may recover these expenses in full if they are supported by a VAT receipt.
- 4.2 Wherever possible such travel should be pre-booked in order to achieve the best possible value for the Trust.
- 4.3 Taxis should only be used and expenses reclaimed when it is not reasonably practicable to use public transport (eg because of exceptionally late end to a meeting or because quantities of materials needed to be carried).
- 4.4 Taxis may be used and reclaimed if the cost of such is lower than the cost of car parking plus mileage charge.
- 4.5 For train and air travel the standard/economy class must be used unless it can be proven that a first class or equivalent ticket is cheaper than a standard fare on the same journey.

5 CLAIMS FOR SUBSISTENCE EXPENSES

- 5.1 Staff are entitled to claim subsistence expenses in situations where they are working or are on a conference/course away from their normal place of work and do not arrive home until after 20:00 and are more than 30 miles from school or home, and the relevant meal is not provided as part of the event package.
- 5.2 Subsistence claims should be made on the standard Expenses Claim Form and must be supported by a VAT receipt and be up to a maximum of:-
 - (a) £10 per breakfast, if required to leave home before 06:30
 - (b) £15 for lunch
 - (c) £25 for an evening meal
- 5.3 Alcoholic drinks may not be consumed and reclaimed whilst on Trust business. Alcohol may not be purchased with Trust funds, nor accepted by the Trust as a gift from a 3rd party in any circumstances (except for religious purposes), as this is in direct

contravention of the DfE Academies Handbook. Alcohol may not be sold by the Trust on school premises as this would require a licence from the Local Authority, and such should not be sought by the Trust. Alcohol may be sold on Trust premises by a 3rd party (eg PTA) subject to the express agreement of the LGB, the 3rd party holding an appropriate alcohol sales licence, outside of normal school opening hours, in a segregated area not accessed by children, and covered separate insurance to the Trust's policy. Accidents or damage to Trust property caused by staff the under the influence of drugs or alcohol would not be covered by the Trust insurance policy.

6 CLAIMS FOR OVERNIGHT STAYS

- 6.1 When meetings, conferences, events involve one or more overnight stays away from home all reasonable claims for accommodation and expenses will be met.
- 6.2 For school based staff the prior approval of the Headteacher must be sought before incurring overnight accommodation costs and they should not exceed £130 per night (£160 in London). Employees who incur higher costs than these will be expected to meet the excess themselves. For Trust based staff the prior approval of the CEO will be required.

7 PROFESSIONAL MEMBERSHIPS

- 7.1 Professional membership fees are not usually claimed via expenses and would be the responsibility of the employee as part of an individual's personal CPD requirements.
- 7.2 There may be exceptions to the above, for example if The Trust is supporting a period of training and professional membership is a requirement of this training. In this scenario the fees can usually be claimed via expenses.
- 7.3 Any claims will be subject to approval by the CFOO and are non-contractual.

8 OTHER EXPENSES

- 8.1 School curriculum resources should be purchased through normal school purchasing procedures and not via staff expenses.
- 8.2 In the rare instance where any school expenditure is incurred by staff this will only be reimbursed if it has been approved in advance by the Headteacher and following the submission of a standard expense claim form with supporting receipts (VAT receipt where applicable).
- 8.3 If a staff member incurs school expenditure without prior approval of the Headteacher the claim will be rejected except in exceptional circumstances e.g. a maintenance team member purchasing equipment to stop a leak. In this instance it may not be feasible to get prior approval without exacerbating the degree of damage incurred.

9 POLICY ON STAFF RECEIVING FREE SCHOOL MEALS

- 9.1 Staff who attend all day training events, or meetings with other Trust staff, should not expect a free lunch or dinner to be provided and should make their usual arrangements for mealtimes. This includes meals paid for by a 3rd party (eg training partner, sponsor). Light refreshments may be provided at the Trust's or School's discretion.

- 9.2 Staff who attend meetings with Directors, Governors or other 3rd parties (eg local authority, DfE or Diocese representative etc) over the lunchtime period or early evening may receive a free light lunch or dinner during the course of their official duties. Staff should be aware that accepting such may need to be disclosed to HMRC by the Trust as a taxable benefit via the P11D process.
- 9.3 Staff who provide 1:1 support to vulnerable children during lunchtime, or providing other lunchtime duties should not expect a free school meal to be provided as this would also be considered a taxable benefit and may need to be disclosed to HMRC via the P11D process.
- 9.4 Meals consumed after meetings and not on school premises must not be paid for with Trust funds. Staff should pay for these themselves and not seek reimbursement.

/end