



# The Bishop Konstant Catholic Academy Trust

Learning Communities, Inspired by Faith

## Trust Staff Expenses Policy 2023



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<b>POLICY DOCUMENT</b>	Trust Staff Expenses Policy
<b>Legislation/Category: Academy Schools</b>	<b>Legally required</b>
<b>Lead Member of Staff:</b>	Chief Financial Officer
<b>Approved by:</b>	BKCAT Trust Board
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<b>Review Frequency:</b>	Annually

***All policies are written in line with our Trust Mission statement:***

With Jesus Christ at the centre of the life of the Trust, we seek to provide learning communities offering the highest possible standards of education. We are committed to working in partnership and trust for the common good. We strive to encourage and empower children and young people to recognise and realise their God-given potential and to discern their vocation in life. As learning communities inspired by faith, we celebrate achievement, offering each other challenge and support, as together we follow Christ in self-giving love and service.



## Trust Staff Expenses Policy

### Introduction

This policy sets out the arrangements for meeting the extra expenses incurred by anyone employed by The Bishop Konstant Catholic Academy Trust (BKCAT) on a permanent or temporary basis, when undertaking official Trust business. The aim is to provide for the reimbursement of reasonable expenses incurred actually and necessarily during the course of business. The policy has been developed in line with BKCAT's commitment to openness and value for money.

Claims must not in any circumstances contain charges not occasioned by official duties. BKCAT may refuse to meet in whole or in part claims in respect of unreasonable expenses, or those expenses which could have been avoided had a journey been better planned.

This policy covers travel within the United Kingdom. All foreign travel must be approved by the Headteacher in advance; foreign travel by any Headteacher, Executive Headteacher or member of the Central Team must be approved by the Chief Executive in advance. Foreign travel by the Chief Executive must be agreed by the Chair of Trustees. The expenses implications for foreign travel will be assessed on a case-by-case basis.

### Definitions

The main definitions used within this guide are:

#### ***Eligible employee***

This is any individual employed BKCAT on a permanent or temporary basis, who incurs necessary expenses while undertaking official Trust business. Where mileage expenses are being claimed, this also includes having signed the Trust's Staff Driving Policy/Agreement.

#### ***Official Travel***

This means travel for the purpose of official Trust business, including:

1. Authorised attendance at meetings or to deliver training
2. Authorised attendance at training courses
3. Authorised attendance at another school outside the Trust for the purpose of providing a service or other support

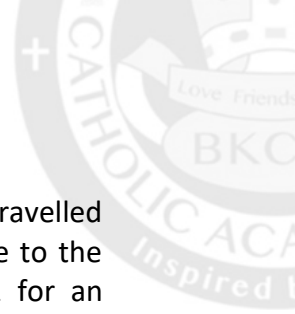
It does not include travel between home and an eligible employee's normal workplace (a 'permanent office' as defined by HMRC). The costs of travel between home and a permanent office are not reclaimable.

#### ***Home***

This means the place where an eligible employee normally lives.

#### ***'Lesser of' Rule***

The "lesser of" rule governs claims for travel expenses and is in line with HMRC information. It applies when an employee travels somewhere other than their normal workplace on official business, usually starting or ending at home. Eligible employees can claim mileage for the distance from home to the place where they are conducting official business or the distance



from their normal workplace to the venue, whichever is the lesser. If the distance travelled from home to the venue is greater than the distance from their normal workplace to the venue, the difference should be recorded as 'unpaid mileage'. See Appendix 2 for an explanation of how to calculate travel under the 'lesser of' rule.

## **Official Travel**

Staff are responsible for ensuring that all travel is undertaken on the most cost-effective basis to ensure efficient and effective use of public funds.

Travel should be by the most economical method available, with regard to efficient use of staff time. Only the actual costs of allowable travel, supported by receipts, will be reimbursed. Individuals may use their private motor vehicles, but this option should be restricted to journeys that cannot be readily made by public transport, or if justified by other reasons. When using public transport, any cheap travel facilities available, e.g. day returns, season tickets or railcards, should be taken advantage of where this is consistent with the efficient use of official time.

## **Travel by Taxi**

Taxi fares are admissible only for journeys when:

- No other reasonable method of transport is available for all or part of the journey;
- Alternative methods of transport are impracticable due to pregnancy, disability, illness or injury;
- It is more cost effective to use a taxi than any other form of transport (e.g. due to multiple staff sharing one taxi compared with other modes of transport).

In the event of a taxi being used for a journey, justification for the use of the taxi must be noted on the expense claim form and a receipt supplied.

## **Travel by Air**

Air travel should only be used when there is a cost advantage. All air travel by staff will require the prior approval of the Headteacher. For air travel by any Headteacher/Executive Headteacher, prior approval of the Chief Executive will be required. Air travel by the Chief Executive will require agreement by the Chair of Trustees. All air travel will be in economy class.

## **Travel by Rail**

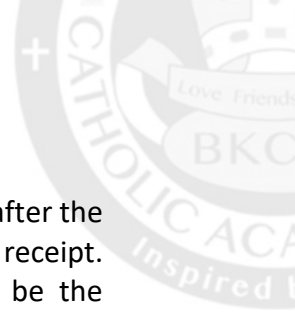
Tickets should be purchased as far in advance as possible to take advantage of advance booking discounts. Staff booking their own train tickets and seeking to reclaim the cost must use booking sites which do not charge a booking fee, as this will not be refunded when there are fee-free options available. At the time of issue, train companies not charging a booking fee include:

[www.grandcentralrail.com](http://www.grandcentralrail.com)

[www.northernrailway.co.uk](http://www.northernrailway.co.uk)

[www.lner.co.uk](http://www.lner.co.uk)

Alternatively a request can be placed with the finance staff in school to book the ticket on behalf of the staff member.



Where staff pay for their own train tickets, they can reclaim the cost of train tickets after the event, provided they submit a copy of the ticket showing the amount paid or card receipt. Individuals should travel by Standard Class. The maximum rate reclaimable will be the “anytime standard open”. If a cheaper ticket is available that does not materially affect the journey (e.g. an advance purchase ticket), the cheaper ticket should be purchased and staff should claim only for the cost of the cheaper ticket. The cheaper ticket may be of a different class to standard.

### **Travel by Private Motor Vehicle**

#### ***Definition***

Mileage expenses are payable when an individual’s private motor vehicle is used. This is defined as a vehicle:

- owned and registered in the employee's name, or,
- being hired by the employee; or,
- registered in the name of the employee’s spouse/partner, provided the appropriate insurance requirements are fulfilled and the vehicle is available for use on official business and to carry official passengers.

Staff claiming mileage for the use of a private vehicle are required to confirm that the vehicle is roadworthy, has a current MOT certificate and is insured for business use. This is confirmed by the staff member submitting the claim form. By submitting the form, staff are also confirming that they are legally allowed to drive, i.e. not disqualified from driving. Staff using their private vehicle for business travel must also have signed a copy of the Trust Staff Driving Policy/Agreement held on file.

#### ***Use of a private vehicle***

Factors which should be taken into account when considering the acceptability of a journey made by private motor vehicle are:

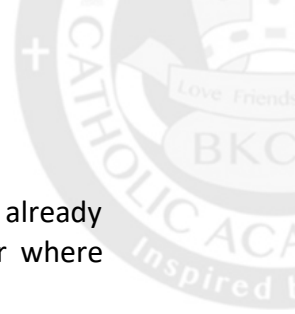
- the nature of the journey;
- any saving in official time;
- the effect on overall efficiency;
- the adequacy of public transport facilities;
- the cost of alternative modes of travel.

### **Food and Drink (Subsistence)**

The actual cost paid by staff for food and drink purchased while on official Trust business outside the schools in the Trust will be reimbursed on production of receipts and up to the limits set out in Appendix A.

These are limits which reflect the maximum amount the Trust will reimburse towards food and drink, not allowances to be paid irrespective of the amount spent, and therefore must be supported by appropriately itemised receipts. A credit card receipt without further detail is insufficient – the receipt must show the items purchased.

The Trust will not reimburse sums paid for alcoholic drinks, as the purchase of alcohol is prohibited by the government’s financial regulations for academies.



Employees will not be reimbursed for items purchased for a meal where one was already provided e.g. lunch provided for delegates at a training course, breakfast/dinner where included in an overnight hotel booking.

Receipts must not include items which are not for the employee’s own consumption on the day the expense is being claimed.

**Other Expenses Claims**

With the exception of travel and subsistence claims, all other expenses must be pre-authorised following the normal processes for authorisation of expenditure. This is to ensure that there is sufficient budget available for the purchase.

See the Gifts and Hospitality policy for details of the arrangements relating to the purchase of gifts by the Trust.

**Procedure for Submitting Claims**

Each individual is responsible for the correctness and completeness of the claim they submit. Claims will be submitted for authorisation using the Trust’s self-service payroll portal. They will be authorised electronically by a designated individual (either the individual’s line manager or the headteacher (where appropriate) in Trust primary schools).

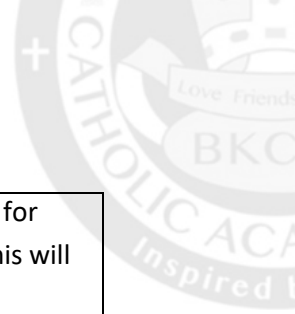
Claims submitted in line with normal payroll deadlines will normally be scheduled for payment in the next payroll run. The deadlines below are for the submission of *authorised* claims to school finance – employees must ensure that they submit claims to their line manager/the individual due to authorise the claim in good time (at least two working days before the deadline; more if they know the individual will be unavailable e.g. due to annual leave).

**Support payroll**

Deadline for authorised overtime/expenses claims to be submitted to school finance	3 <sup>rd</sup> of the month or last working day before if this falls during a weekend/school holiday
August payroll	Three working days before school closes for summer – any expenses incurred after this will be paid in September payroll

**Teacher payroll**

Deadline for authorised overtime/expenses claims to be submitted to school finance	12 <sup>th</sup> of the month or last working day before if this falls during a weekend/school holiday
December payroll (earlier paydate)	6 <sup>th</sup> December or last working day before if this falls during a weekend



August payroll	Three working days before school closes for summer – any expenses incurred after this will be paid in September payroll
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All expenses incurred (excluding travel by car) must be supported by receipts. Claims submitted without receipts will not be paid until a receipt is provided. Copies of supporting receipts will be retained by each school (Finance team for central Trust staff) in line with normal finance document retention periods.

#### *Missed expenses claims*

On occasion, expenses claims are submitted late, authorised late or missed off the payroll run due to human or technical error.

- Where the claim has been submitted by the employee without adequate time for the line manager to authorise the claim (and seek clarification if necessary) before the deadline, the claim will be paid in the next payroll period.
- Where an employee is being reimbursed for a receipted item purchased via expenses (e.g. a hotel room or train ticket), and this has been missed from the payroll despite being submitted in good time by the employee, the school may pay this claim directly as a BACS payment to the employee.
- If a mileage claim submitted by the employee in reasonable time is missed from the payroll due to a failure in the authorisation or payroll submission process, the employee may submit a request for the mileage claim to be paid outside the normal payroll run. As this comes at an additional cost to the school, this will be agreed on a case-by-case basis with consideration given to the value of the claim (claims under £100 will not normally be paid due to the cost of making the payment), the employee's financial circumstances and the reason for the payment being missed.

#### ***Claims on behalf of other eligible employees***

Expenses claims should normally be submitted only for those expenses directly incurred by the eligible employee in respect of their own travel and subsistence arrangements.

On occasion employees from the same school may be travelling together. In these circumstances it is acceptable for one staff member to pay for travel or subsistence items on behalf of themselves and their colleague(s) and claim back the amounts paid (up to the normal maximum allowances per person), provided the name(s) of the other eligible employees for which items were purchased are included in the details on the expenses claim form.

Where staff from different schools are travelling together, separate claims need to be submitted so the charges are applied to the correct school.





## APPENDIX A – EXPENSES CLAIM LIMITS

### Subsistence

Meal	Maximum claim amount	Claim restrictions
Breakfast	£7.00	Employee is on official business outside the Trust for more than 4hrs, having had to leave home before 7am or their normal departure time (whichever is the earlier).
Lunch	£7.00	Employee is on official business outside the Trust for more than 4hrs, departing before 12noon and returning after 2pm.
Tea	£4.00	Employee is on official business outside the Trust for more than 4hrs, leaving before 3pm and arriving home after 6pm.
Evening meal – returning same day	£12.50	Employee is on official business outside the Trust for more than 4hrs, arriving home after 7pm.
Evening meal – overnight stay	£20.00 or actual cost of evening meal in hotel	Employee is staying away overnight on official business for the Trust and an evening meal has not already been paid for as part of the hotel booking.

### Travel

Type of vehicle	First 10,000 miles	Above 10,000 miles
Cars and vans	45p	25p
Motorcycles	24p	24p
Bikes	20p	20p

These rates will be reviewed annually in September.





## APPENDIX 2 – ‘LESSER OF’ RULE

### *Example 1*

Mr Smith lives in Normanton and is going from home to a meeting at St Hilda’s Academy, then back to St Sebastian’s Academy.

Distance from Chez Smith to St Hilda’s Academy	4.7 miles
Distance from St Sebastian’s Academy to St Hilda’s Academy	9.5 miles

In this situation, Mr Smith would claim a total of 14.2 miles (4.7 + 9.5 miles) as the distance from home to St Hilda’s Academy is less than the distance from St Sebastian’s Academy to St Hilda’s Academy.

### *Example 2*

Mrs Jones lives in Knottingley and is going from home to a meeting at St Hilda’s Academy, then back to St Sebastian’s Academy.

Distance from Chez Jones to St Hilda’s Academy	12.8 miles
Distance from St Sebastian’s Academy to St Hilda’s Academy	9.5 miles

In this situation, Mrs Jones would claim a total of 19 miles (9.5 + 9.5 miles) as the distance from home to St Hilda’s Academy is more than the distance from St Sebastian’s Academy to St Hilda’s Academy. She would then record the difference between home to St Hilda’s Academy and St Sebastian’s Academy to St Hilda’s Academy (3.3 miles) as unpaid mileage on the expenses claim.