



Little Way Catholic
Educational Trust

Staff Expenses Policy

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1. Aims and Introductions

This policy sets out the Little Way Catholic Education Trust's (LWCET) rules and procedures for claiming reimbursement for expenses, including travel and accommodation, incurred wholly, necessarily and exclusively on the business of the Trust or its schools. Any attempt to claim reimbursement for costs fraudulently or breach this policy may result in disciplinary action as per the LWCET Disciplinary Policy.

It applies to all LWCET employees. Trustees and Local Governing Committee members should instead see our policy on governors' allowances and expenses.

This policy does not form part of any employment contract or other agreement to provide services, and the Trust may amend this policy at any time.

2. Role and Responsibilities

2.1 Authorisation

<i>Employee claiming expense</i>	<i>Authorised by</i>
<i>School staff (excluding headteachers/heads of school)</i>	<i>Headteacher</i>
<i>Headteachers, executive headteachers and heads of school</i>	<i>Chair of Local Governing Committee / CEO</i>
<i>Shared Service Team</i>	<i>Shared Service line manager / CEO</i>
<i>CEO</i>	<i>CFO / Chair of Trustees</i>

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

2.2 Accounting officer

- Ensure all expense requests made to them are handled according to this policy*
- Review this policy regularly [e.g. annually]*
- Ensure compliance with all financial regulations*
- Investigate expense claims that appear excessive or inconsistent*

2.3 Headteachers

- Ensure all expense 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 homes and their normal place of work, which is defined as 'ordinary commuting'.

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

LWCET 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 are appropriate.

3.1 Public transport

When travelling, Employees must seek out the most cost-effective public transport method for 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 reimbursed 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 vehicles for business purposes where it is convenient and cost-effective, provided the vehicle is safe, legal to drive, and insured.

LWCET 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.

LWCET 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:

- *£120 outside of Greater London*
- *£150 in Greater London*

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

LWCET will not meet the costs of any extension to the stay for personal reasons or for accommodation for individuals other than the employee, such as 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:

£25 per working day

£40 per 24-hour period away

LWCET will not reimburse the purchase of any alcohol.

5. Other expenses

The person responsible for approving expenses may approve other categories of expenditures incurred while on the business of LWCET on a case-by-case basis.

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

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

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

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 that may fall outside of the categories or spending limits set out in this policy. Failure to seek prior approval before expenses are incurred may result in LWCET withholding reimbursement of the expenses.

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

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 one month of the expense being incurred*

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

If there is disagreement about whether an expense should be approved, the case may be escalated to Kevin Parker, CFO.

Appendix 1: Staff expenses form

School Name / Shared Service Team(delete as appropriate)

Staff expenses claim

Name:

Job title:

I request the total sum of £_____ for expenses incurred on the business of [school/Trust] as detailed below. I have attached relevant receipts to support my claim.

Signed: _____

Date: _____

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 your approver along with any relevant receipts.