



# Expenses Policy

May 2024

Review date:	May 2026
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## Woodborough Woods School Expenses Policy – Table of Contents

### Our vision

At Woodborough Woods, we ‘Grow Together’ following Jesus’ example to ‘Love your neighbour as you love yourself’ (Matthew 22:37-39) because through love for one another, we can build a strong learning community ensuring that everyone has the opportunity to flourish.

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## **Introduction**

- 1.0 The Governing Body of Woods Foundation adopted this policy on 22<sup>nd</sup> May 2024. The Finance Committee of the governing body will review and monitor the impact of the policy annually with the head teacher.
- 1.1 The governing body has adopted the policy set out in this document to provide a clear framework for the exercise of its powers and discretions in relation to all staff employed in the school and paid from within the school budget.
- 1.2 The governing body is committed to taking decisions in accordance with the principles of public life as listed in DfE guidance; objectivity, openness and accountability.
- 1.3 The governing body recognises the legal requirements placed upon them by the Education Act 2002 and subsequent amendments, alongside the conditions of employment as set out in the Conditions of Service for School Teachers in England and Wales (Burgundy Book) and the National Joint Council for Local Government Services (Green Book).
- 1.4 The governing body delegates to the Finance Committee the responsibility for decisions on payment of expenses to staff in line with this policy.
- 1.5 The policy set out in this document has been formulated by the above Committee of the governing body supplemented by staff representatives and other Governors - as appropriate. Full consultation with the staff in school and their representatives has taken place. The policy will be reviewed annually by the same representative group.
- 1.6 The governing body will take into consideration advice and guidance from the employer relating to the policy.
- 1.7 This policy should be read in conjunction with the current school pay policy and disciplinary procedure.

## **Equalities and Equal Opportunities**

- 2.0 The governing body recognises its legal responsibilities to staff under the Equality Act 2010 and this policy will ensure equality and fairness regardless of race, sex (gender), sexual orientation, religion or belief,

gender re-assignment, pregnancy and maternity, marriage and civil partnership, disability or age.

- 2.1 All expenses decisions will be taken in accordance with relevant equalities legislation, the Employment Relations Act 1999, the Part-Time Workers (Prevention of Less Favourable Treatment) Regulations 2000 and the Fixed Term Employees (Prevention of Less Favourable Treatment) Regulations 2002. In doing so the Finance Committee of the governing body will ensure that decisions and processes are open, transparent and fair.
- 2.2 The governing body is also aware of its responsibilities and those of the employer in respect of the Equal Pay Act 1970 which requires that men and women have a right to equal treatment and equal pay for work of equal value.
- 2.3 The governing body is aware of its responsibilities under the Freedom of Information Act 2000 and to make available this policy to all staff at the school.

### **Aims of the Policy**

- 3.0 The aims of the governing body's Expenses Policy are as follows:
  - a) To ensure staff are paid appropriate expenses incurred whilst undertaking school business or activities; and
  - b) To provide a framework that ensures fairness and transparency regarding the payment of expenses to staff.

### **Roles and Responsibilities**

- 4.0 The head teacher will ensure that all employees are aware of the governing body's commitment to pay expenses incurred whilst carrying out their role.
- 4.1 Where the governing body determines expenses are payable in line with this policy the head teacher will ensure these are paid.

### **Road Worthiness and Insurance of Vehicles**

- 5.0 In this school employees will be given the [NCC Driving Safely Handbook](#) and [B37: Occupational Road Risk](#) document to read and understand prior to using their vehicle on school business.

- 5.1 All employees must complete and sign [SR63 and/or SR64 Driver Record and Risk Assessment Forms](#) prior to using their vehicle on school business. These forms confirm the employee has a valid driving licence, MOT, road tax and motor insurance, amongst other factors.
- 5.2 All employees who use their vehicles, or someone else's, including that of their partner, on school business must ensure that the relevant motor insurance policy covers the use of that vehicle on school business. The certificate of insurance should state the use permitted and this will be checked.

### **Travel Rates**

- 6.0 Mileage allowances for travelling on authorised school business are determined by the governing body using HM Revenue & Customs (HMRC) approved rates. There are locally determined rates for motorcycles, and bicycles.
- 6.1 Car mileage rates, effective from 6 April 2011 and in line with amendments to the HMRC recommended rate are;

Per mile (first 10,000 miles)	45p
Per mile (after 10,000 miles)	25p

- 6.2 Locally determined mileage rates for other forms of transport are as follows;

Motorcycles	24p
Bicycles	20p
Volunteers Rate	45p
Public Transport Rate	22.6p

### **Travelling Allowances**

- 7.0 The normal daily commute journey between home and the permanent work base is considered by HMRC to be commuting and, therefore, not claimable.
- 7.1 Where possible, and appropriate, school vehicles should be used for official journeys. Any such journeys must have prior-approval and are not claimable.

7.2 Official mileage from and to the school should be undertaken and claimed by the shortest available route, unless a standard mileage has been determined.

7.3 Where official mileage is claimable from and to the employee's home address, this should normally be undertaken by the shortest available route and must be claimed on the basis of;

Home address to first call – Whichever is the shorter distance between mileage from home to first call and mileage from the school to first call.

Last call to home address – Whichever is the shorter distance between mileage from last call to home and mileage from last call to the school.

7.4 Prior approval of the governing body, or head teacher, must be sought if an employee intends to use their car for a journey beyond 30 miles round trip from the school. Employees should always investigate the use of public transport as their first option for such journeys.

7.5 Where any such approval has not been given, but the employee chooses to travel by car, claims will be limited to the cost of public transport.

7.6 Parking fees will be reimbursed where use of a public car park is unavoidable.

7.7 The school shall have the right to require an employee to carry official passengers without any additional payment and employees should not use their own cars on journeys where there is room on one of the school's vehicles or in the car of another employee making the same journey.

7.8 As far as possible, employees should travel together to reduce the number of journeys made.

7.9 When attending training courses mileage claims are limited to the excess over the normal daily home to school expenses. Additional mileage will be paid at the appropriate rate.

### **Use of Public Transport and Taxis**

8.0 Employees travelling by bus or train will be reimbursed the cheapest possible combination of tickets for the journey(s) undertaken.

- 8.1 Where possible, train tickets will be pre-booked using the standard class fare, unless travel by other classes of ticket is cheaper overall.
- 8.2 If pre-booking, train tickets should be booked through the School Business Manager).
- 8.3 In exceptional circumstances, and at the discretion of the governing body/head teacher, taxis may be used by employees for journeys.
- 8.4 All taxi bookings will be made through the Executive Headteacher / School Business Manager.

### **Employees Involved in a Permanent Change of Base**

- 9.0 The governing body is responsible for considering applications from employees for disturbance allowances in circumstances where the work base permanently changes for reasons beyond their control.
- 9.1 In broad terms, the national provisions prescribe that employees shall not bear any travel costs beyond those which they previously incurred.
- 9.2 In this school, disturbance allowances, where applicable, will be paid for a maximum of two years from the date of the change in work base.
- 9.3 In the first instance the governing body will seek to provide free travel facilities by way of private hire transport.
- 9.4 Employees who cannot make use of any free travel facilities will need to complete an Application for Reimbursement of Disturbance Allowances form before making a claim. This approves the amount to be claimed.
- 9.5 Employees who travel by car should claim the Public Transport Rate (PTR) for the extra miles by the shortest route.
- 9.6 Employees travelling by other methods of transport should claim the appropriate rates as outlined in paragraph 6.2.
- 9.7 Any employee who, in the two-year period, moves home of their own accord shall not qualify for any greater excess payment than originally approved. Payments will reduce or cease if the new home is nearer to the new base than the previous home was.

## **Employees Involved in a Temporary Change of Base**

- 10.0 Circumstances may arise where, for example, an employee is moved between schools in a job rotation as part of a Collaboration or Federation, or some other career development arrangement.
- 10.1 As the circumstances may vary, it is proposed that any issue arising will be dealt with on an individual basis and in accordance with the provisions for a permanent change in base.
- 10.2 If an employee has a temporary work base for less than 24 months, HMRC classes travel between home and the temporary base as business mileage.

## **Subsistence Allowances**

- 11.0 In the event of working away from school staff shall not be entitled to claim a meal allowance.  
If a member of staff chooses to eat a school dinner in the school hall at lunchtime they shall be entitled to a free school meal. This must be agreed prior with the Headteacher or School Business Manager.

## **Making a Claim**

- 12.0 All claims should be submitted to the head teacher for approval on a monthly basis for approval by the end of the month.
- 12.1 Claims must only be completed by the employee incurring expenditure, detailing dates, reasons for all journeys and the full names of places visited.
- 12.2 For schools using NCC Payroll claims will then be processed by the Portal Administrator using the appropriate [NCC Travel and Expenses Claims Form](#).
- 12.3 Claims will be delayed if the form is not filled in correctly and/or VAT receipts are not provided.
- 12.4 **Wherever possible everything that can be paid for should come from the schools ordering system.**

## **False Claims**

- 13.0 If it is considered that any expenses claimed were not legitimately incurred on behalf of the school, further details may be requested.



- 13.1 Payment of expenses may be withheld where insufficient supporting documents have been provided.
- 13.2 Where payment has been made prior to the discovery that the claim was not legitimate or correct, the value of that claim may be deducted from the claimant's salary with notice as required.
- 13.3 In the event of false claims becoming evident disciplinary action, where appropriate, will be taken in line with the school's Disciplinary Procedure.

### **Monitoring and Review**

- 14.0 Where changes to this policy are proposed the governing body will undertake an Equality Impact Assessment (EQIA). The governing body will make available to staff the outcomes of the Equality Impact Assessment.

### **Consultation and Agreement with the Recognised Trade Unions**

- 15.0 The Nottinghamshire School Expenses Policy is recommended for adoption by all community, voluntary aided, voluntary controlled, academy, foundation, and trust schools who purchase their HR Service from Nottinghamshire County Council.
- 16.1 The document has been agreed with the following Nottinghamshire recognised trade unions: ATL; ASCL; NAHT; NUT; NASUWT; UNISON and GMB.