

# Viking Academy Trust



## Expenses Policy

The VIKING ACADEMY TRUST 'Expenses Policy' has been written following guidance from **The Academies Financial Handbook**

**Approved by the Trust: Term 2 2017**

**Reviewed every two years: Term 1**

**Last review date: Term 1 2026**



**Signed:**

**Chair of Trustees**

# Expenses Policy

## The Viking Academy Trust

Empowering Children Through Education: One Childhood – One Chance

Schools in the Viking Academy Trust (VAT)

Chilton Primary School  
Ramsgate Arts Primary School  
Upton Junior School

This '**Expenses Policy**' is for the aforementioned schools.

### Contents:

General Policy Statement	3
Overview	3
Travel Expenses	4
Travel Allowances	4
Subsistence	5
Claim for reimbursement	6



## General Policy Statement

It is the Viking Academy Trust's policy to reimburse staff for all necessary travel, accommodation and other expenses incurred while engaging on authorised Trust business (excepting normal day to day travel to and from home).

This policy sets out clear guidance for expenses across all schools across the VAT and for all staff claims. The aim of this policy is to ensure that all decisions on claims for expenses are managed in a fair, just and transparent way.

The Board of Trustees will undertake to:

- Ensure all staff and trustees are treated fairly and equitably under this policy
- Ensure compliance with the principles set down by the Committee on Standards in Public

This Expenses Policy is applied consistently across all schools and for all staff working for the VAT. It follows recommendations set out in the Academies Schools Financial Handbook. A copy of which is on the Trust website and saved on Sharepoint for key personnel, governors and Trustees to access.

### 1. Overview

- 1.1. The Trust will set levels of expenditure that are deemed appropriate and cost effective and which may only be varied at the discretion of the Executive Headteacher.
- 1.2. The level of reimbursement allowed should be sufficient to provide a standard and quality that adequately meets the needs of members of staff and promote the effective conduct of the Trust's business. The rate of reimbursement is set out below.
- 1.3. All staff should complete travel and expenses claim forms (*Staff Payroll Claim on key survey*). This is sent out to all staff across the first week of every month.
- 1.4. All claim forms should be submitted within **one month** of the event or payment being made. Claim forms that are submitted later than this will only be paid if the staff member can show adequate justification for the delay.
- 1.5. Failure to follow this policy may lead to non-payment of expenses or where the employee has intentionally sought to defraud the Trust, disciplinary action.
- 1.6. The expenses policy will be monitored by the CFOO under delegated responsibility from the FAR committee every two years.

### 2. Travel Expenses

- 2.1 The Trust's Financial Regulations require cost-effective travel arrangements. Car users should not therefore automatically use their cars for travel. Public transport can be more convenient, or air travel may be more cost effective for longer journeys. In order to achieve best value, the person who makes a claim should ensure that they are able to demonstrate the cost effectiveness of the journey claimed.
- 2.2 Where more than one person is travelling to the same event, arrangements should be made to share transport if appropriate and convenient.

### 3. Travel Allowances

- 3.1 The casual user car allowance is: 55p per mile for the first 10,000 business miles (25p thereafter). This can be claimed on all authorised Trust journeys.



- 3.2 Car parking costs, while on Trust business, will be met when receipts are provided. Necessary road and bridge toll cost will be met including the congestion charge where there is a genuine business need to incur it.
- 3.3 Taxi fares may be claimed when travelling in an unknown location, where the saving in time is important and where there are issues surrounding personal safety. A limit of 20 miles per trip should be placed on taxi journeys. Receipts should be obtained. Planned taxi bookings must be made through the Trust finance team.
- 3.4 When using your car on Trust business you must have a current clean driving licence, use a vehicle that is roadworthy, and have a valid MOT and personal insurance protection that covers business use. All fines for motoring offences, including parking tickets, are the responsibility of the individual, not the Trust.

**By train:**

- 3.5 Rail tickets should be booked whenever possible well in advance, preferably pre-booking tickets to travel on specific timed trains. Open tickets may only be booked if you have no way of knowing what time your meeting with finish. Travel should normally be by standard class. First class travel is only appropriate if either, there are no standard class facilities to accommodate disabled or other special needs requirements, or the cost of the first class ticket is less than a cheapest equivalent ticket for standard class. Booking should be made through the Trust finance team using the Trust 'One card'.

**By air:**

- 3.6 Because of distance, air travel may be the most cost effective mode of transportation. If this is the case, value for money should be demonstrated. As with train travel, whenever possible, flights should be booked well in advance using the most cost effective ticketing arrangements. For flights over six hours duration, business class travel is justifiable on health and work-related grounds. All air tickets should be booked through the Trust finance centre using the Trust 'One card'. All air travel should be authorised by the Executive Headteacher or the Chair of Trust.

**4. Subsistence**

- 4.1a Members of staff necessarily incurring additional expenses when away from home on Trust business with respect of meals or overnight accommodation will be reimbursed (subject to prior authorisation) up to the following amounts:

Overnight stay in hotels up to £150 per night  
Overnight stay in private accommodation up to £50 per night

**Meals:**

Breakfast – if not included in the overnight stay up to £10;  
Lunch – if not part of the course / conference / event up to £15;  
Evening meal if staying overnight up to £25 (this must not include alcoholic drinks).

- 4.1b Members of staff on school trips/residential are welcome to purchase refreshments if prior agreement has been sought from Head of School/EHT eg day trip to France staff accompanying children to have hot drink on ferry crossings.
- 4.2 These are the maximum limits and where less is spent the actual amount should be claimed. Claims for meals and/or overnight accommodation should not apply when provided as part of a course/conference package. Expenses should be claimed using an expenses claims form (*Appendix 1*) accompanied by receipts. Overnight accommodation should be booked through the Trust finance team using the Trust 'One card'. Please note if you fail to provide receipts then the costs cannot be reimbursed.



Appendix 1:

[VAT Staff Payroll Claim Form](#) (including overtime/mileage etc)

Appendix 2:

[VAT Expenses Form Claim for Reimbursement](#)

**PLEASE ATTACH ORIGINAL VAT RECEIPT AND SUBMIT CLAIMS WITHIN ONE MONTH OF EXPENDITURE**

