

# Shottery St Andrew's CE Primary School



This policy is underpinned by our school vision based on the scripture,

*'Let your light shine before others, that they may see your good deeds and glorify your Father in heaven.'*  
Matthew 5:16

## Allowance and expenses Policy

<b>Date adopted by Governors:</b>	<b>June 2024</b>
<b>Date for policy review:</b>	<b>June 2026</b>
<b>Person responsible for review:</b>	<b>Headteacher</b>
<b>Signed by Chair of Governors</b>	<i>L Cranelly</i>

All employees are entitled to claim for out of pocket expenses such as travel costs in the course of carrying out their responsibilities and duties, for staff this excludes travel to their normal place of work and for Governors this excludes travel to regular meetings. This policy governs and manages the way in which reimbursement is made and supports our principles that no employee should profit, or lose money when undertaking work for the school.

All staff and governors are required to comply with this policy and are subject to the same audit requirements of providing receipts, having their expenditure authorised /approved by the Headteacher and Chair of Governors, and retaining records of purpose and mileage undertaken.

Governors may not claim for actual or potential loss of earnings or income.

**This policy will be reviewed annually in line with updates from HMRC with regard to amounts which may be claimed.**

## Subsistence

Employees who as a result of their official employment duties have to stay away overnight or leave/return at unreasonable hours may claim reimbursement of the actual expenditure incurred (excluding alcoholic drinks) up to the maximum. A valid receipt for the actual expenditure incurred must accompany and support each claim otherwise no reimbursement will be made. All hotel bookings will be made directly by the school and the school will be invoiced accordingly.

Expenses may be claimed where the employee is required to attend a meeting or course before 7:00am or after 8:30pm. Receipts must be provided.

Description	Amount (up to)
<b>Breakfast rate</b> (only where an employee leaves before 6:00am and returns after midday) - The rate may be paid where a request from the school requires an employee leaves home earlier than usual and before 6.00 am and incurs a cost on breakfast taken away from his home after the qualifying journey has started. If an employee usually leaves before 6.00am the breakfast rate does not apply.	£5.00
<b>Late evening meal rate</b> - The rate may be paid where the employee has to work later than usual, finishes work after 8.30 pm having worked his normal day and has to buy a meal before the qualifying journey ends which the employee would usually have at home.	£15.00

The breakfast and late evening meal rates are for use in exceptional circumstances only and are not intended for employees with regular early or late work patterns. Staff intending to claim against these rates should ensure they have authorisation from the Headteacher prior to the initial spend.

## Travelling allowance

Travelling allowances are payable where staff or governors need to travel to carry out official duties for example attending training booked by the school. Employees must ensure the vehicle used for the purposes of this travel is insured and taxed correctly to do so.

The mileage rates will apply where personal cars are used for business purposes irrespective of engine size.

When undertaking school business, staff and governors should adhere to traffic regulations. Any parking penalties or other liabilities that arise from the way the vehicle is used, particularly breaches of the Road Traffic acts, the Traffic Management Act and Motor Vehicles (Construction and Use) Regulations are not the responsibility of the school and must not be claimed as an expense to be reimbursed. This includes excess charges incurred (eg: compound charges) by not buying such items as congestion charge tickets, car parking tickets, etc.

Employees should agree in advance with their Head Teacher and Chair of Governors whether travel by car, train, flight or other public transport is appropriate before any journey is undertaken and should be reviewed regularly to ensure that it is still effective. Employees are required to research the most economical method of purchasing public transport tickets, e.g. bus, train, taxi tickets. The costs cannot be reimbursed via a Personal Expense Claim. All travel by train should be by Economy Class unless a more economic means is available. Receipts for any expenses associated with public transport e.g. train tickets which could not be pre-purchased, should be attached to the claim form.

Receipts or confirmation of travel will be required for all journeys in order for claims to be reimbursed. teaching commitment at the start of the day.

Mileage is paid from home to the business venue and vice versa unless the member of staff is required to attend work prior to the meeting/ course for example due to.

**The current mileage rate paid by WCC is 40p per mile, the remaining 5p should be claimed through a tax return.**

Governors may claim for travel to attend WCC training requested by the school/FGB/ Chair, if a governor wishes to attend other WCC training and wishes to claim for travel this should be agreed prior to the training to ensure there are sufficient funds. Staff will not be paid travel for attendance at courses which have not been booked by the school.

All governors and associate members are eligible to claim allowances in accordance with this scheme.

Only in exceptional circumstances, will the school book training outside of Warwickshire, this is because there are insufficient funds to reimburse travel costs of this level. Governors should be mindful of this policy and accordingly if a governor or member of staff wishes to attend a training course or conference outside of Warwickshire and is anticipating claiming travel expenses, approval for the true cost must be gained in advance. Staff and governors should not simply attend events because they look interesting, all training should be linked to the SIDP.

#### **Care arrangements**

School staff are eligible to claim for care arrangements where they are required to attend official duties beyond their agreed reasonable normal working hours and where this necessitates child care or babysitting expenses which are not able to be provided by a relative or partner or for care arrangements for an elderly or dependent relative, where these are not provided by a relative or partner. These will be used in exceptional circumstances only for events such as parents evening, training outside of Warwickshire which would result in the member of staff being unable to collect or look after their dependent or changes to agreed working patterns.

Care Arrangements	Actual costs incurred, up to a maximum of £5.00 per hour per dependent
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Governors may also claim for care arrangements as above, however this should be identified at the previous governing body meeting to enable consideration for an alternative date to be set.

#### **Allowance Rates**

Rates at which allowances are payable are as defined for staff members. Where a governor requires childcare facilities to attend a meeting or training they may make use of the school's afterschool club at no charge until 5:30pm (this applies to children who are pupils at Shottery only).

#### **Criteria for Claims**

All claims must be submitted to the head teacher on the official form, held in the school office within one month of the expenditure being incurred. (Receipts must be supplied to support claims for

reimbursement, e.g. bus ticket, taxi receipt, till receipt, childcare invoice, a VAT petrol receipt should be supplied for any mileage claims.)

### **Financial Systems**

The school's normal systems for authorising and processing payments will apply to claims made under this scheme.