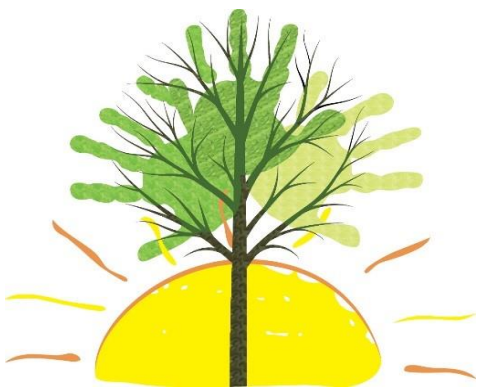


SHINE Multi Academy Trust Staff
Expenses part of SHINE's suite of 'Take
Care' policies for staff



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Management log

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Chair of the Board



CEO

Document history

Version	Date authored	Author	Date approved	Date issued	Comments
V1	May 2017	Sarah Brown	22 June 2017	22 June 2017	To secure a staff expenses policy to support SHINE and its academies
V2	January 2020	Sarah Brown	6 February 2020	7 February 2020	Biennial review as SHINE has grown to five academies and there are differing levels of staff supporting business and finance.
V3	June 2024	Sarah Brown	6 June 2024	6 June 2024	Review as SHINE has grown to six academies

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Any printed copies should therefore be viewed as 'uncontrolled' and as such, may not necessarily contain the latest updates and amendments.

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Directorates and departments affected by this policy – All staff

1. Equality statement

1.1 The SHINE Multi Academy Trust (SHINE) is committed to promoting equal opportunities and all stakeholders will receive equal treatment regardless of age, disability, gender reassignment, marital or civil partner status, pregnancy or maternity, race, colour, nationality, ethnic or national origin, religion or belief, sex or sexual orientation (Protected Characteristics).

2. Overview

2.1 It is SHINE's policy to reimburse staff for all necessary travel, accommodation and other expenses incurred while engaged on authorised SHINE business (excepting normal day to day travel to and from home).

2.2 The Board of Trustees (Board) will set levels of expenditure that are deemed appropriate and cost effective and which may only be varied at the discretion of the CEO or headteacher (as applicable). The key principle to be applied is value for money.

2.3 The level of reimbursement allowed should be sufficient to provide a standard and quality that adequately meets the needs of members of staff and promotes the effective conduct of SHINE's business. The rate of reimbursement is set out below.

2.4 All staff should complete travel and expenses claim forms and return them to their academy business manager or the chief finance officer (CFO), as applicable.

2.5 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.

2.6 Failure to follow this policy may lead to non-payment of expenses or where the employee has intentionally sought to defraud SHINE, disciplinary action.

2.7 This Expenses Policy will be monitored by the resources committee and reviewed every two years.

3. Travel expenses

3.1 SHINE's Financial Regulations require cost-effective travel arrangements. Car users should not therefore automatically use their cars for travel. Public transport – trains, buses or trams can be more convenient and cost effective. 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.

3.2 Careful consideration will be given to staff with mobility problems when undertaking journeys. Adjustments may, for example, include payment of taxi fares or overnight accommodation.

3.3 Where more than one person is travelling to the same event, arrangements should be made to share transport if appropriate and convenient.

3.4 Headteacher expenditure will need to be approved by the chair of the local governing body. Any expenditure by the CEO must be approved by the chair of the Board.

4. Travel allowances

4.1 By Car:

4.1.1 The Casual User Car Allowance is 45p per mile for the first 10,000 business miles (25p thereafter). This can be claimed on all authorised SHINE journeys. The distance between the staff member's normal place of work and the meeting / conference / course venue should be claimed except when the distance between home and venue is shorter. In this case, the home to venue mileage should be claimed.

4.1.2 Car parking costs, while on SHINE 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.

4.1.3 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 business manager or CFO after approval by the CEO or headteacher (as applicable).

4.1.4 When using your car on SHINE business you must have a current and clean driving licence, use a vehicle that is roadworthy, has 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 Board.

4.2 By Train:

4.2.1 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 will 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 the cheapest equivalent ticket for standard class. Booking should be made through the SHINE Central Team using the company account, of which the individual academy will be recharged.

5. Subsistence

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

- Overnight stay in hotels:
 - London - up to £160 per night excluding VAT;
 - outside London - up to £100 per night excluding VAT;
 - overnight stay in private accommodation - £25.

- Meals:
 - Breakfast - if leaving home before 6.00am and if not included as part of an overnight stay package - up to £5. If the employee usually leaves before 6am the breakfast rate does not apply.
 - Lunch - if not part of the course / conference / event - up to £5. The rate may be paid where the employee has been undertaking qualifying travel for a period of at least 5 hours and has incurred the cost of a meal
 - Evening meal - if arriving home after 8.00 pm or staying overnight - up to £15.
- 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

5.2 These are the maximum limits and where less is spent the actual amount should be claimed.

Claims for meals and overnight accommodation should not apply when provided as part of a course/conference package. Expenses should be claimed using an expense claim form accompanied by receipts. Overnight accommodation should be booked through the business manager or CFO (as applicable) using the debit card.

Please note if you fail to provide receipts then the costs cannot be reimbursed.