

Expenses Policy

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1. Definitions

- 1.1 **Trust** means the Diocese of Ely Multi-Academy Trust
- 1.2 **DEMAT** means the Diocese of Ely Multi-Academy Trust.
- 1.3 **Academy** means a constituent academy of DEMAT.
- 1.4 **Central Team** means staff who are not employed within an academy.
- 1.5 **Central Leadership Team** means any Director or Head of a Function in the Central Team.
- 1.6 **Senior Manager** means a Senior Manager within the academy or a Hub Director or Senior Manager within the Central Team.
- 1.7 **Headteacher** means Leader of an academy. In any academy that has an Executive Headteacher, it means Executive Headteacher.
- 1.8 **Line Manager** means any member of staff with management responsibility including Headteachers and or Central Team Managers.
- 1.9 **Hub-Worker** means an employee who works to support a group of academies.
- 1.10 **Non-Teaching Staff** means any employee not employed in a teaching role within an academy.
- 1.11 **Staff** means any person employed by DEMAT, temporarily or permanently.
- 1.12 **Employee** means any person employed by DEMAT, temporarily or permanently.

2. Application of this policy

This policy applies to all teaching and non-teaching employees of DEMAT based either in academies or within the central team.

All volunteers referred to in our Volunteer Policy are also covered by this policy.

This policy does not form part of any employee's Contract of Employment or Volunteer Agreement and may be amended, at any time, following consultation with recognised unions.

3. Relationship with DEMAT Values

The application of this policy must be applied at all times in a way that reflects the values of DEMAT and our Christian Ethos:

Love – We engender love and tolerance between and for our staff, pupils and others to foster an inspiring atmosphere of mutual support.

Community – We are committed to ensuring our schools are a living part of the community and contribute positively to its needs.

Respect – We do everything to provide a caring, safe and secure place for our staff and pupils to be happy and respected in our schools so they may achieve their potential.

Trust – We acknowledge accountability and responsibility for our actions and ensure that we encourage each other to make brave decisions and then learn from any mistakes.

Ambition – We are determined that our schools offer a place for the joy of learning, enabling those of all abilities to thrive and go on to lead rewarding lives

4. Associated Policies and Documents

This Policy/Procedure should be read in conjunction with the [HMRC Approved Mileage Rates](#) and following DEMAT Policies/Procedures:

Colleague Code of Conduct

Pay Policy

Expenses Form – Available from hrteam@demat.org.uk

5. Version Control

Policy type	DEMAT Trust Policy
Author	Helen Rothwell, Head of HR
Reviewed by	Helen De Spretter, Head of Finance
Approved by	Adrian Ball, Chief Executive Officer Date: 25 November 2025
Release date	8 December 2025
Review	BI-ANNUAL Policies will be reviewed in line with DEMAT's internal policy schedule and/or updated when new legislation comes into force.
Description of changes	The policy has been reviewed in line with legislation and best practice to provide clarity, greater consistency and support for Line Managers and staff. For further information regarding the specific changes please contact the HR Team at hrteam@demat.org.uk

This document will be reviewed on a bi-annual basis. For all questions in relation to this policy, please contact the HR Team hrteam@demat.org.uk

6. Purpose and Scope

- 6.1 This policy sets out a clear framework for expenses incurred by staff or volunteers when working or providing services to DEMAT. It includes any relevant travelling expenses and any purchases that staff may be required to make on behalf of the academy which must always be in line with this policy.
- 6.2 This policy is aligned with Inland Revenue Regulations and the principles and obligations under the Academy Trust Handbook.
- 6.3 Staff may claim reimbursement for reasonable expenses incurred wholly, necessarily and exclusively for the academies business and/or services. These may arise from attending meetings, training courses or conferences, but excludes home to work journeys.
- 6.4 This policy also covers purchases for academies which are wholly necessary and must be approved by the budget holder prior to purchase.

7. Policy Statement

- 7.1 The Trust is committed to continually ensuring that public funds and other resources entrusted to our organisation are used appropriately, efficiently and always seeking best value.
- 7.2 It is recognised that payment of expenses must be handled fairly and transparently whilst taking care to keeping expenses to the minimum, wherever possible.
- 7.3 This policy covers our commitment to ensuring the procurement of goods and services on behalf of each academy is a simple process. Staff should avoid making purchases themselves to claim back via expenses however, where this is not possible staff should revert to this policy to ensure they adhere to the terms necessary to ensure reimbursement of purchase.
- 7.4 Claims adhering to the procedures in this policy will be paid without deduction from income tax. However, it is the claimant's responsibility to ensure payment for any due tax is made. Other expenses may constitute benefits-in-kind and will be taxed accordingly. For advice on this, contact hrteam@demat.org.uk
- 7.5 Any expenses claim form (travel or purchases) submitted that is inappropriate or false may lead to disciplinary action.
- 7.6 This policy is not exempt from our commitment to promoting equality of opportunity and will ensure that no one receives less favourable treatment based on any of the protected characteristics as defined in the Equality Act 2010 (age, disability, sex (gender), gender reassignment, sexual orientation, marriage and civil partnership, race, religion or belief, pregnancy and maternity).

8. Roles and Responsibilities

Each of the following have key roles and responsibilities to ensure that accurate and timely claims are processed.

8.1 Line Managers

- Ensure all staff are aware of this policy and understand the deadlines and authorisation process for submitting claims.
- Consider the most carbon efficient and cost-effective methods for your own travel and authorise your team's mileage and expense claims in accordance with this.
- Before authorising any claim, establish that there is sufficient money in the budget to meet the costs and due consideration is being given to achieving value for money.
- Ensure all claims are in line with this policy and that each claim contains full details including verification that employees hold a driving license and relevant insurance. Where there is mileage or multiple purchasing, expenses are checked for accuracy.
- Enable any reasonable adjustments that are required under the Equality Act in connection with all aspects of this policy.

8.2 Staff

- Ensure that all journeys are necessary and use alternative travel where it is cost effective and carbo efficient.
- Complete your expenses form in a timely manner and attach receipts that are required as proof of purchase of items, food or travel tickets.
- Ensure the relevant Line Manager authorises the claim form. Claims that do not meet the approval will not be processed.
- Ensure your vehicle is roadworthy, you drive within the law, and you have the appropriate documentation (including business travel, MOT and up-to-date tax).
- Check your corresponding payslips following any claim to ensure accuracy of payments and retain a copy of the claim form for 12 months.

8.3 HR Team

- Ensure the claims are checked and processed in a timely manner, having regard for meeting deadlines, any supportive documentation and appropriate authorisation.
- Provide support to staff on any expenses related queries.

9. Procedure for Travel Expenses

9.1 Academy Staff & Central Team

Leaders and academy staff, alongside central team staff who are not 'Hub Workers' must adhere to the following:

The key principles to be followed are that travel expenses (mileage claims) will not be payable for 'to and from' journeys to your designated work-base. However, where you are required to travel for business reasons to our academies or undertake business travel outside the Trust, mileage will be payable subject to the following:

9.1.1 In accordance with Her Majesty's Custom and Revenue (HMRC) where a staff member uses a car, van or motorcycle they may claim rates in accordance with this. Where changes are applied to the HMRC rates these will be applied to our mileage policy.

9.1.2 Any mileage claims starting or finishing from home must have your normal commute mileage deducted from the claim. Mileage claim forms should include your home to work mileage for reference.

9.1.3 For occasions where staff travel together the driver may claim a passenger business mileage rate in line with current HMRC rates. The claim should not include the driver's 'home to work' journey.

9.1.4 Any mileage over 10,000 per year will be payable at reduced rate in line with HMRC regulations see [HMRC Approved Mileage Rates](#). A record of personal cumulative mileage should be retained with the start date aligning with the start of the tax year. Please email hrteam@demat.org if you have any queries relating to your individual mileage.

9.1.5 Reimbursement of mileage expenses via claims forms (available from hrteam@demat.org.uk) subject to the following:

- (I) They have been wholly necessary for the purpose of travelling for Trust business or services.
- (II) They have not been reimbursed by another party.
- (III) The mileage expenses form is accurate (See Appendix 1).
- (IV) Car insurance is up to date and includes business travel.
- (V) The vehicle has valid vehicle tax and an up-to-date MOT (if applicable)
- (VI) Claim forms should include the starting and destination.
- (VII) Claim forms should be authorised appropriately and submitted by the deadline.
- (VIII) Claim forms that are delayed by 6 months or more will not be reimbursed.

9.2 Travel Expenses - Hub-Workers

9.2.1 Hub Workers are eligible to receive an allowance to cover mileage to their academies on an agreed frequency based on the role. This is based on the following criteria:

- (I) For consistency for Hub Workers, mileage to each academy in the hub is payable minus 12 miles (each way)
- (II) The working pattern of how many visits per month will be dependent on your role.

- (III) The total mileage is based on 10 months travel (to incorporate non-term time) and paid monthly over 12 equal instalments.
- (IV) Mileage is paid at the HMRC approved rates - [HMRC Approved Mileage Rates](#)
- (V) The allowance is subject to tax and NI in line with HRMC

9.2.2. Hub workers are not eligible to claim mileage to our Ely Office due to this being classed as a 'permanent workplace' alongside academies in the Hub.

9.2.3 Hub Workers may claim additionally for the following subject to 9.1.1 – 9.1.4 above being applicable:

- (I) Any journeys undertaken between academies on the same day. For example, where a visit to one academy in the hub is followed by travel another before returning home. Claims can be made for the full distance travelled minus 12 miles (each way).
- (II) Any travel outside of your hub or the Trust for business/service purposes (excluding our Ely Office should also have the 12 miles deducted (each way).

9.2.4 Where Hub Workers change their academy profile, their allowance will be adjusted accordingly.

9.2.5 All mileage as above will be reimbursed in line with HMRC approved rates - [HMRC Approved Mileage Rates](#)

10. Use of Public Transport

10.1 The use of public transport for eligible journeys will be reimbursed upon receipt, provided the expenses are reasonable.

10.2 Staff should use the most economical class of travel and seek value for money. Generally, standard or economy class.

10.3 In addition to public transport (trains, buses, ferries); Staff may claim for taxis where it is economical or critical.

10.4 It is recommended that UK rail is booked well in advance of the date of travel to take advantage of discounted fares.

10.5 Staff may also claim for car parking, congestion charges and or/toll charges subject to the travel being required for business/service purposes.

11. Subsistence Allowances

11.1 Overnight subsistence rates will only be payable where travel is for DEMAT's business purposes. DEMAT will not meet the cost of additional parties or accommodation provided to a spouse or other family members.

11.2 Reasonable expenses for the cost of accommodation, food and drink will be reimbursed if 11.1 applies but must be supported by receipts and wholly necessary for the purposes of DEMAT.

11.3 Subsistence may only be claimed if an overnight stay is involved and you are away from home, this must reflect the actual cost of meals/beverage up to a maximum of:

Breakfast: £ 12.50 Lunch: £ 10.00 Dinner: £20.00

11.4 Personal items including alcoholic drinks, mini bars etc., will not be reimbursed and such items should be deducted from any claim.