



TITLE		REF	VERSION
Expenses Policy		FIN002	3.0
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Group Executive Team		13/07/2022	13/07/2024
LEAD PERSON		Group Director of Finance, Cost Manager	
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EXPENSES POLICY

Policy Statement

Activate Learning is committed to ensuring that all financial obligations are met in a timely manner. This policy sets out the Organisation's approach for reimbursing staff for reasonable expenses incurred whilst completing their role.

Background

A majority of anticipated expenditure is covered by supplier contracts and paid within agreed payment terms once a service or product has been provided. In some instances staff will incur expenses in the course of their duties which cannot reasonably be avoided and cannot be accommodated within existing supplier agreements. This document sets out the Organisation's policy in relation to reimbursing staff for expenses incurred.

Purpose

This policy is intended to provide staff with clear guidance in relation to the types of expenditure that can be reclaimed via staff expenses and the authorisations which must be obtained from an employee's line manager prior to the expenditure being committed.

Scope

This policy applies to all staff of Activate Learning Group.

Definitions

Abbreviations used throughout this policy are:

- **The Organisation** - Activate Learning Group
- **Individual** – Employees of the Activate Learning Group

Responsibilities

Job title	Responsibilities
Individual	To ensure that expense claims are valid and includes all necessary supporting documentation i.e. receipts
Individuals Line Manager	Ensure that the claim is in line with policy and approve in a timely manner
Payroll Department	To pay authorised expenses claims in the monthly payroll runs

Claiming Expenses

This policy outlines the regulations around individuals claiming expenses where they relate to work taking place on behalf of the organisation which include but are not exclusive to following:

Travelling Expenses – Domestic and International

Travelling expenses may be claimed by staff required to travel away from their contractual place of work in the course of their duties. Travel should be planned and undertaken bearing in mind the need to minimise the cost to the organisation.

The International Division holds the budget for the majority of overseas travel undertaken for the purpose of international student recruitment and transactional education (TNE) project development, and will produce an annual plan of overseas visits to be undertaken.

Any expenditure associated with overseas visits must be approved by the Group Executive Director in advance of any bookings being made.

Subsistence Expenses

Subsistence is defined as food and drink. Where a member of staff incurs subsistence expenses as a direct result of being away from their permanent base in connection with their duties, they may claim reimbursement subject to the conditions set out within the Expenses Procedure.

Accommodation Costs

Where a member of staff incurs accommodation expenses as a direct result of being away from their permanent base in connection with their duties, they may claim reimbursement subject to the conditions set out within the Expenses Procedure. Overnight accommodation will be arranged by the individual staff member where necessary. Standard rooms should be booked unless there is a clear cost advantage to booking an upgraded room package or there is a safety or security concern.

Flights

Where a member of staff incurs flight expenses as a direct result of being away from their permanent base in connection with their duties, they may claim reimbursement subject to the conditions set out within the Expenses Procedure. All short/medium haul flights will be booked in Economy Class. Short/medium haul is defined as flights between 30 minutes and 6 hours in duration. Long haul is defined as flights of more than 6 hours in total from point of origin to final destination.

Expenses incurred for using DSE Equipment

Employees who regularly use DSE equipment as a significant part of their normal work are entitled to a voucher to cover the cost of an eye test and a contribution towards new glasses. See Expenses procedure for more details.

Non defined Expenses

Employees may purchase, and reclaim the cost of, materials that are essential for the operation of the business. Approval must be obtained from the employee's line manager prior to any expenditure taking place.

It is the responsibility of the individual to ensure that all claims are made in a timely manner, ideally within 1 month of the expenditure date or within a maximum of 3 months from date of expenditure.

The Expenses Procedure document will provide further guidance on how to claim a reimbursement, the supporting documentation required and further details on rates which can be claimed.

References

This policy should be used in conjunction with the Expenses Procedure which provides more information on how this policy is applied.