



Carlton Academy Trust Travel and Expenses Policy

Ratified Date:	Sept 2020
Signed on behalf of the Trustees:	R Butterfield
Signed on behalf of the CEO:	A Kneeshaw
Review Date:	Sept 2022

Scope and General Principles

This policy applies to all trust employees, for the reimbursement of travel and associated expenses incurred solely and necessarily in the performance of their duties. Employees should travel and be accommodated in safety and reasonable comfort. Expenditure should be kept to the minimum consistent with the effective performance of work on behalf of the trust. Employees should neither gain nor lose financially, with the mode of travel being the most cost-effective consistent with the business needs of the trust.

Bookings and Claims

Wherever possible, travel reservations should be made well in advance to take advantage of cheaper fares or accommodation. For this purpose, bookings should be made through the school/trust finance personnel. First Class travel will not be authorised. Any purchasing decision shall not be adversely influenced by any promotional incentive such as personal credit card discounts or rebates.

Claims for reimbursement should be made as soon as possible after the expenditure has been incurred and conform to HM Revenue & Customs requirements. To be compliant claims need to demonstrate:

- The purpose and details of the journey.
- The amount paid or reimbursed.
- Details of any hospitality providers

All claims made for business travel and expenses must relate to actual expenditure incurred and wherever possible should be supported with receipts. Mileage rates for use of a personal vehicle are in line with current HM Revenue & Customs guidelines:

Petrol and Diesel Cars	45 p per mile
Electric Cars	12 p per mile

Supporting receipts must be provided for mileage claims so that VAT can be reclaimed. Journeys should follow the shortest route, but allowances may be made for journeys taken by other routes where greater mileage is incurred for convenience or speed. Claim forms should be submitted within one month of incurring the expense.

Definitions

The following are considered business journeys:

- Travel between the permanent workplace and a temporary workplace
- Travel between home and a temporary workplace
- Travel between two temporary workplaces

Claims for business journeys that start or end at home should be for the lesser of:

- the distance travelled
- or
- the distance that would have been travelled if the journey had started or ended at the employee's normal place of work.

Partner/Friend's Expenses

Partners or friends must not travel at the trusts' expense, except when their presence is required for an authorised business purpose. In all cases, the Head of School or CEO must provide authorisation in advance, and wherever possible their travel costs should be paid privately. The trust will not be liable for insuring the partner or friends travel.

Car Hire

Car hire may be considered more cost-effective for long journeys. Finance personnel must be contacted at least two weeks in advance of the travel date so that arrangements can be made. The trust will not be responsible for any traffic violation, speeding/parking fines or similar incurred whilst on trust business.

Use of own car

Members of staff who use their own vehicle on trust business must have a valid licence, ensure their vehicle is roadworthy and legal, and ensure that their motor insurance policy covers them for the relevant business use. Employees may be required to provide evidence of business use insurance, licence and MOT before travel is authorised.

Accommodation

When employees are necessarily away from home on trust business they are entitled to hotel or other suitable accommodation. Basic standards include cleanliness, privacy, and personal security. Wherever possible, the relevant finance personnel should be contacted at least two weeks in advance of the travel date so that arrangements can be made.

Should an employee wish to stay with friends/relatives, they may make a small contribution towards costs. Supporting receipts should be provided and should be less than an equivalent stay in a hotel and must not include alcohol. Additional costs incurred travelling to the friend/relative's house, will not be reimbursed.

Car Parking

The trust will reimburse car parking costs incurred whilst on business away from the employee's normal place of work. Claims must be supported by receipts. Where a parking meter is used and no receipt available, a note detailing this must be included in the claim.

Parking excess charges, fines, wheel clamp unlocking etc. will not be met by the trust.

Taxis and Public Transport

Where possible, taxi use should be authorised in advance, and only used when it is not feasible to use public transport for cost and/or necessity. Claims must be supported by receipts. The trust reserves the right not to reimburse claims for taxi fares which have not been authorised in advance, or reasonably justified. All public transport journeys must be supported by receipts.

Allowances

There is no provision for the payment of breakfast expenses (including drinks), except for when on overnight stays. Lunch expenses are not normally reimbursed, but there may be specific circumstances that warrant this. In these circumstances, there should be prior approval from the Head of School or personnel of similar or higher seniority. Expenses for evening meals are allowable if the return journey is scheduled to arrive at school/outbound travel station or similar after the close of the school day (6pm).

Staff are entitled to claim expenses for relevant meals whilst on overnight stays. Limits for each meal are as follows:

Breakfast: £10 (if not included in accommodation)

Lunch: £10 (if not included in course, training or similar)

Evening Meal: £20 (if not provided elsewhere)

- Staff may choose to purchase a meal to a greater cost but will only be reimbursed up to the individual meal limits.