



**CARLTON**  
ACADEMY TRUST

**Carlton Academy Trust  
Travel and Expenses Policy**

**Approved on behalf of Trustees:**

**Gareth Logan**

**Review Date:**

**November 2023**

**Next review date:**

**November 2025**

## **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 school/Trust duties.

Staff should travel and be accommodated in safety and comfort. Expenditure should be limited at a level appropriate to effective performance of their work on behalf of the Trust. This means that greater expenses may be justified according to the importance of the work and/or the involvement of the employee in this work, to ensure satisfactory fulfilment of Trust corporate objectives.

## **Definitions**

The following are considered business journeys:

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

## **Bookings and Claims**

Bookings must be made through school or central Trust finance personnel, except for occasions where circumstances make this impractical or impossible. They should also be made well in advance to take advantage of cheaper fares or accommodation.

Claims for reimbursement should be made within one month of the expense being incurred and conform to HM Revenue & Customs requirements including:

- Details and purpose of the journey/expense
- Amount claimed.

## **Vehicles Mileage**

Mileage rates for use of a personal vehicle (first 10,000 miles) are in line with current HM Revenue & Customs guidelines:

Cars (petrol/diesel/electric):	45p per mile
Motorcycles:	24p per mile
Electric Cars	12 p per mile

Journeys should normally follow the shortest route, but allowances may be made for journeys taken by quicker, more convenient routes. Claims for travel starting and ending at the employee's home address should also subtract mileage incurred in their typical daily commute (where relevant).

Central Trust staff do not have a nominated site, school, or place of work. Therefore, the travel to the first school or trust site each day will be classed as the 'commute'. Subsequent travel during the day will then be eligible for mileage claims. Wherever possible and practicable, travel between schools during the day should be minimised to prevent wastage of time incurred in travelling and monies incurred in mileage expenses.

Claims do not need to be accompanied by fuel or charging receipts to be approved. However, checks may be made to establish whether journeys are justified, reasonable, and approved by line managers (where relevant).

### **Partners and Friends**

Partners or friends must not travel at the Trusts' expense and their costs must be paid separately by the employee. The exception to this is when their presence is required for an approved business purpose, authorised in advance. The Trust is not liable for insuring the partner/friend's travel.

### **Car Hire**

Car hire may be more cost-effective in specific circumstances. Wherever practicable, school/Trust finance personnel should be given at least two weeks' advance notice to make a booking. The Trust is not responsible for any traffic violations, speeding fines, parking fines, or similar.

### **Use of Own Car**

Members of staff who use their own vehicle must provide evidence that:

- They have a valid licence.
- Their vehicle is legal and roadworthy through an MOT certificate for cars 3+ years of age.
- Their motor insurance policy covers them for the relevant business use or is at least insured if using the schools 'Occasional Business Use' insurance.

They must also sign a CAT 'Vehicle Indemnity Form' (Appendix 1) to further confirm these details.

Schools have purchased an 'Occasional Business Use' policy to cover their staff on rare occasional business use.

### **Accommodation**

Wherever possible, school/Trust 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, the Trust may make a small contribution towards costs. Supporting receipts should be provided and should be less than an equivalent stay in a hotel. Additional costs incurred travelling to the friend/relative's house, will not be reimbursed.

### **Car Parking**

The Trust will reimburse reasonable car parking costs. Claims must be supported by receipts, except where a parking meter is used, and no receipts are available. Where this occurs, a note detailing this must be included in the claim. Parking excess charges, speeding fines, or charges for wheel clamp unlocking etc. will not be met by the Trust.

## **Taxis and Public Transport**

Wherever possible, taxis should be authorised in advance, and only used when it is not feasible, practical, or cost-effective to use public transport. For example, a taxi for five people in London may be less than the cost of five individual underground tickets.

## **Meal Allowances**

These should be discussed and approved in advance in the context of the journey. However, generally, expenses for evening meals are allowable if the return journey is scheduled to arrive at school/finish after 6pm.

Allowances for meals are as follows (if not provided elsewhere):

**Breakfast:** £10

**Lunch:** £10

**Evening Meal:** £20

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

## **Alcohol**

The Trust will not reimburse any claims for expenditure on alcohol in any circumstances.

## **Approval**

Where prior approval is required, the follow guidelines must be followed:

**Head of School** – for all school-based staff.

**CEO** – for all Central Trust staff.

**Chair of Trustees** – CEO

## **Receipts**

All claims should be supported by receipts. Exceptions are for vehicle mileage claims, or where impossible or impractical.

## **Trust Right of Refusal**

The Trust at its sole discretion retains the right not to reimburse claims where they do not follow policy guidelines such as being booked in advance, supported by receipts, deemed as reasonable in the circumstances, etc.



## Appendix 1: Use of Private Vehicle on Trust Business Indemnity Form

### **Employee Details**

Name:

School:

Position

### **Vehicle Details**

Make/Model:

Engine Capacity:

Diesel / Petrol

Registration Number:

### **Insurance and Vehicle**

I confirm that:

- A) My vehicle is in a roadworthy condition and has a valid MOT certificate (where appropriate).
- B) I can confirm that my vehicle has business use insurance and covers the person driving the vehicle on school business OR I can confirm I am using the schools 'Occasional Business Use' insurance as this is a one off journey.
- C) I understand that I must advise payroll of any changes to A or B as soon as reasonably possible.

**Name:**

**Signature**

**Date:**



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**Appendix 2: Mileage Claim Form**

**Name:**

**School and Role:**

**Vehicle Make and Model:**

**Registration Number:**

**Engine Capacity (CC):**

I have completed the Car Indemnity form and supplied a copy of my insurance certificate confirming a have Business Insurance

I am using the schools 'Occasional Business Use' insurance for this journey and I am aware this is only for occasional/irregular journeys

<b>Date</b>	<b>Journey Details/Reason</b>	<b>Mileage Private</b>	<b>Mileage Official</b>	<b>Mileage Claimed</b>
			<b>Total Mileage Claimed</b>	

**Declaration:** I agree/confirm that:

- These expenses have been wholly, exclusively, and necessarily incurred during authorised business duties.
- Accurately represent costs incurred.
- I will report any duplicate payment or overpayment without delay.
- I have attached a relevant fuel receipt.

**Name:**

**Signed:**

**Date:**

**Authorised by:**