



Travel Policy

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1. RATIONALE

1.1. Academy staff may be required to undertake travel and other duties which result in claims for travel expenses and subsistence. The nature of the travel and subsistence varies considerably due to the diverse involvement in a range of local, national and international initiatives.

1.2 Routine travel between sites as part of a cross-Academy role is NOT eligible for further reimbursement of travel costs. An annual allowance dependent on the travel band of the role already compensates for this travel. The levels of this annual allowance will be reviewed annually (see Appendix A)

1.3 Travel on Academy business outside the normal role of a member of cross-Academy staff will be reimbursed in full, provided the rules in the next sections of this Policy are followed.

1.4 All staff members are recommended to consult with their manager if they are unsure whether travel costs will be reimbursed before travelling.

1.5. Staff should follow the academy school travel and subsistence policy procedures. These take into account Inland Revenue regulations.

1.6. For a number of international projects the level of travel and subsistence is dictated by the provider of the funding for travel and in these cases the Academy should adhere to the provider's rules and levels

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2. TRAVEL

2.1. PRIVATE VEHICLE – Insurance

2.1.1. Employees who use their own vehicle or a vehicle registered or insured in someone else's name, on academy business, must ensure that the insurance covering themselves and the vehicle is adequate. The cover must be sufficient to permit the employee to drive the vehicle on academy business.

2.2. PRIVATE VEHICLE- Casual Car User Allowance

- 2.2.1. Where an employee, whether full or part time is authorised to use a private car or motor cycle on academy business, the employee will receive an allowance of forty (40) pence per mile.

2.3. PRIVATE VEHICLE – Calculating Mileage

- 2.3.1. Commuting mileage – refers to one journey each way from home to work and work to home on normal/contractual working days and will not be reimbursed.
- 2.3.2. Journeys that begin at home, travel directly to a site address and then on to the school will be reimbursed on the basis of the actual mileage less normal commuting mileage one way
- 2.3.3. Journeys that begin at school, travel to a site and then on to home, will be reimbursed on the basis of actual mileage less normal commuting mileage one way
- 2.3.4. Journeys that start and finish at home, travel to a site address and then directly back to home will be reimbursed on the basis of actual mileage less normal commuting mileage each way.
- 2.3.5. For the avoidance of doubt mileage claims involving a journey to school (2.3.2 to 2.3.4) will be supported by a standardised form clearly showing the actual mileage covered, less the normal commuting mileage
- 2.3.6. Congestion Charge. Any congestion charge fee incurred on a journey for academy business which is not a journey each way from home to work and work to home on a normal/contractual working day, will be reimbursed only upon the submission of a valid receipt or monthly statement from TFL upon which the relevant journeys are clearly marked.

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2.4. PRIVATE VEHICLE – Car Parking Charges

- 2.4.1. Car parking charges will be reimbursed only on production of a valid receipt.
- 2.4.2. The academy is not liable for any parking fines or road traffic penalties incurred by staff, regardless of circumstances.

2.5. CLAIM FORMS

- 2.5.1. All mileage, parking, taxi and subsistence claims must be paid via claim forms and not via petty cash. This ensures the correct information is available to the Inland Revenue, and for calculating P11D returns.

- 2.5.2. Claims should be made on a regular basis and should be authorised, checked and signed by Authorised School Signatories before sending to the school office.
- 2.5.3. The timetable for submitting claims is the 15th of each month following the month to which the claim relates.
- 2.5.4. Claims should be submitted within 3 months of being incurred . After this date claims will not be processed.

2.6. OTHER JOURNEYS

- 2.6.1. Where employees travel by bus or train or taxi to get to a site or meeting away from school, then reasonable expenses, supported by receipts, will be reimbursed in full. At all times the most cost effective and/or efficient means of transport should be used. All claims are required to clearly state the date, origin, destination and reason for travel.
- 2.6.2. Wherever possible train, coach or air travel should be pre-booked in order to achieve the best possible value for the Academy.
- 2.6.3. Reimbursement will be made via the appropriate claim form, via payroll, on provision of appropriate supporting documentation.
- 2.6.4. Taxis should only be used when it is not reasonably practicable to use public transport (e.g. because of exceptionally late end to meeting or because quantities of materials need to be carried)

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2.7. TRAIN TRAVEL

- 2.7.1. Standard class rail travel together with the cost of reserving the seat in advance will be paid. First class travel will not be paid except in exceptional circumstances approved by the Principal or where it can be proven that a first class ticket is cheaper than a standard fare on the equivalent journey.

2.8. AIR TRAVEL

- 2.8.1. Air travel being paid for using Eden Academy funds will always be in economy class, although booking business class fare and recharging the Academy the economy price would be acceptable. The exception to this is the scenario as set out in schedule 2.8.3 when a fee is being received by the Eden Academy from which the cost of appropriate travel will be borne.

- 2.8.2. Where travel on business by air is required and being paid for by the client, the level of travel dictated by the provider of the funding (in accordance to their rules and levels) will be adhered to.
- 2.8.3. In cases where travel on business by air is required, the Eden Academy is receiving a fee for that work and where the level of travel is not dictated by the provider of the funding, the following rules shall apply: Where travel flight duration is up to and including five (5) hours an economy seat must be booked. If the flight duration is greater than five (5) hours and up to and including eight (8) hours then premium economy may be booked where available. If the flight duration is greater than eight (8) hours then business class may be booked. For flights of between five (5) and eight (8) hours duration, where premium economy is not available, then business class may be booked providing there is no alternative carrier with premium economy provision available.
- 2.8.4. For the avoidance of doubt, flight duration refers to the actual scheduled flight time advertised in advance by the airline. This means the actual amount of time spent in the air and does not include aircraft changes and layovers. The exception to this is advertised technical stops which are built in to the flight time.
- 2.8.5. The difference in cost between economy and premium economy or business class should be borne by the provider of the funding where possible. If the cost of upgrades is not borne by the provider of the funding then the academy can bear the cost provided that this is covered by any relevant fee income. Where possible it is preferable that this cost is built in to any relevant fee income thus maximising revenue for the academy.

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3. SUBSISTENCE

- 3.1. Employees are entitled to claim subsistence expenses in situations where they are working or are on a conference/seminar/training course away from school, and do not arrive home until after 22:00, and are more than 30 miles from school or home. Upon production of receipts, employees will be reimbursed for their actual expenditure up to the maximum allowances (£8.00 for breakfast, £10.00 for lunch, £20.00 for evening meal). Employees required to leave home before 06.30 in order to attend a meeting, event etc, may be reimbursed for breakfast to a maximum of £8.00. Claims should be submitted on the monthly car allowance claim form.
- 3.2. Claims will only be reimbursed in cases where the relevant meals are not provided as part of the event package.

DRINKS

- 3.3. No reimbursement will be made for alcoholic drink when on academy business. The only exception to this is when it forms part of a pre-arranged meal/ entertainment and will be subject to approval in advance by the Principal.

REFRESHMENTS

- 3.4. When attending exhibitions, reasonable claims for refreshments and lunch during the day will be reimbursed to a maximum of £10.00 per day.

OVERNIGHT STAY AWAY FROM HOME IN UK

- 3.5. When meetings, conferences, events involve one or more overnight stays away from home, the type of expenses eligible for reimbursement will be agreed with the Head of School in advance. If the event/ conference requires residential accommodation, all reasonable claims for accommodation and expenses will be met.
- 3.6. Except in exceptional circumstances or with the prior approval of the Principal, accommodation (i.e. bed and breakfast) charges should not exceed £90.00 per night (or £140.00 in London) and evening meal £20.00 per night. Payment will only be made on actual expenditure supported by receipts. Where an employee chooses to exceed the maximum amount, the school will only reimburse to the maximum level and the employee will bear other costs.

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VISITS ABROAD

- 3.7. Where visits abroad are not subject to specific funding provider rules, the type of expenses eligible for reimbursement will be agreed by the employee with the principal in advance. For guidance, reasonable claims for accommodation, meals, refreshments and Academy work related telephone calls will be reimbursed where these are not supplied by the provider of funding for the visit.
- 3.8. For international travel a daily subsistence rate of GBP10.00 (£10.00) for each night stayed abroad may be payable with the agreement of the Principal in advance.
- 3.9. Summary of Subsistence Allowances

- Breakfast: maximum £8.00 (if leave home before 06.30 on the day of outward travel)
- Lunch/refreshments: maximum £10.00 per day
- Evening meal: maximum £20.00 (if return home after 22:00 on the day of inbound travel or away)

This document was approved and adopted by the Board of Trustees on 03rd May 2018.

Name of the Chair of Trustees Barry Nolan

Signature of the Chair of Trustees: _____

Date: May 2018

To be reviewed: May 2019

Appendix A

In order to reduce time and bureaucracy, a tariff system has been identified for members of the central team that will result in an annual, salaried and therefore taxable payment. This appendix therefore details the current tariffs in relation to the Eden Academy travel policy and the methodology for assigning a particular tariff to a staff member.

This appendix will be reviewed on an annual basis by the finance committee.

Methodology

Staff members belonging to the central team (or any other member of staff deemed to be undertaking frequent and regular journeys) should discuss their potential tariff level with their line manager on an annual basis in order to allocate a suitable tariff.

Discussions should be based on journeys that are deemed 'regular and frequent'. By regular and frequent, that would mean predictable and weekly journeys. Other journeys that may take place sporadically (e.g. home visits and out of hours meetings) that are not weekly should therefore be claimed for separately. Staff members should come to this meeting prepared to indicate their working pattern over the previous month.

The line manager will inform the Head of Finance and Resources about the outcome of the discussions.

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Tariffs (2018)

- **Tariff 1: 1 or 2 journeys every week. £200**
- **Tariff 2: 4 or 5 journeys every week. £500**
- **Tariff 3: 6 or more journeys £750**

Those staff who undertake irregular journeys, outside of their regular work routine, should continue to claim expenses for this via the travel claim system.

The timetable for submitting claims is the 15th of each month following the month to which the claim relates.

Claims should be submitted within 3 months of being incurred . After this date claims will not be processed.