



The View Trust
MULTI-ACADEMY TRUST

STAFF TRAVEL, EXPENSES AND ALLOWANCES POLICY THE VIEW TRUST

CONTENTS

- 1. Introduction**
- 2. Travel expenses and allowances**
- 3. Travel by car**
- 4. Travel by train**
- 5. Travel by air**
- 6. Subsistence expenses and allowances**

This Policy will be reviewed by the Board of Trustees on an annual cycle

Person responsible for the Policy:	School Business Manager (Tor View School)
Colleagues affected by this Policy:	All Trust employees
Approved and adopted by Trustees:	9 th March 2017
Next Review:	2018

STAFF TRAVEL, EXPENSES AND ALLOWANCES POLICY

1. INTRODUCTION

It is The View Trust's policy to reimburse staff for all necessary travel, accommodation and other expenses incurred while engaged on authorised Trust business (excepting normal day to day travel to and from home).

The Trust will set levels of expenditure that are deemed appropriate and cost effective and which may only be varied at the discretion of the Principal at each school. In this instance, the key principle to be applied is value for money.

The level of reimbursement allowed should be sufficient to provide a standard and quality that adequately meets the needs of members of staff and promote the effective conduct of the Trust's business.

All staff must ensure that:

1. Expenses associated with the trip have been agreed by the Principal before committing to the travel. Colleagues should be aware that failure to do this may result in a claim not being reimbursed if the purpose and/or costs associated with the claim are disputed.
2. Claim forms must then be submitted to the appropriate line manager to confirm that the travel has taken place and/or that the expenses are authorised.
Note: Claim forms without this confirmation will be returned to the employee without being processed for payment
3. Once authorised, claim forms must be submitted to the School Business Manager by the published date on the calendar for processing
4. All claim forms should be submitted within one month of the event of payment being made. Claim forms that are submitted later than this will only be paid if the staff member can show adequate justification for the delay
5. This policy will be monitored by the Trust Finance Team and will be reviewed annually by The View Trust Board of Trustees

Important!

- Failure to follow the guidelines may result in non-payment of claims
 - Where a claimant has been proven to defraud the Trust, disciplinary action will be taken and this may result in dismissal

STAFF TRAVEL, EXPENSES AND ALLOWANCES POLICY

2. TRAVEL EXPENSES AND ALLOWANCES

- a) The Trust's Financial Regulations require cost-effective travel arrangements:
 - Car users should not automatically use their cars for travel
 - Public transport may be more convenient
 - Air travel may be more cost effective for longer journeys
- b) In order to achieve best value, the person who makes a claim must ensure that they are able to demonstrate the cost effectiveness of the journey claimed
- c) Careful consideration will be given to staff with mobility problems and the difficulties they may experience when undertaking journeys. Adjustments may, for example, include payment of taxi fares or overnight accommodation.
- d) Where more than one person is travelling to the same event, arrangements must be made to share transport if appropriate and convenient

STAFF TRAVEL, EXPENSES AND ALLOWANCES POLICY

3. TRAVEL BY CAR

- a) Business and Training mileage - The Casual Motor Mileage Allowances (per mile):

Travel Type	Car	Motorcycle	Bicycle
Business	45p	24p	20p

- b) The allowances can be claimed on all pre-approved and authorised Trust and or Academy journeys
- c) The distance between the staff's substantive Centre and the meeting / conference / course venue should be claimed except when the distance between home and venue is shorter. In this case the home to venue mileage must be claimed
- d) Parking costs, while on Trust business, will be met when receipts are provided
- e) Necessary road and bridge toll cost will be met including any congestion charges where there is a genuine business need to incur it
- f) Taxi fares may be claimed (but **must** be pre-approved) when travelling:
- In an unknown location or
 - Where the saving in time is important or
 - Where there are issues surrounding personal safety
 - The number of permitted miles per trip will be placed on taxi journeys at the time they are pre-authorised
 - Receipts should be obtained
 - Planned taxi bookings must be made through the Trust finance department
- g) When colleagues are using their own car on Trust business, they **MUST**:
- hold a current and clean driving license
 - use a vehicle that is roadworthy and have a valid MOT certificate
 - have current car and personal insurance protection that covers Business use
- Note: A copy of a valid insurance certificate must be presented to the School Business Manager before any claims can be approved**

Important!

All fines for motoring offenses, including parking tickets, remain the responsibility of the individual, not the Trust

STAFF TRAVEL, EXPENSES AND ALLOWANCES POLICY

4. TRAVEL BY TRAIN

- a) Wherever possible, rail tickets must be booked well in advance of the journey
- b) Tickets on specific timed trains (most economical) must be booked unless not operationally feasible
- c) Open tickets may only be booked if there is no way of determining what time the work commitment will finish
- d) Travel should normally be by standard class
- e) First class travel is only appropriate if:
 - There is a requirement to undertake Trust or School related work whilst travelling
 - There are no standard class facilities to accommodate disabled or other special needs requirements
 - The cost of the first class ticket is less than the cheapest equivalent ticket for standard class
- f) Requests for travel should be directed through the Trust Finance Team, in order for the booking to be made using the appropriate School's debit card

STAFF TRAVEL, EXPENSES AND ALLOWANCES POLICY

5. TRAVEL BY AIR

Because of distance, air travel may be the most cost and time effective mode of transportation. If this is the case value for money must be clearly demonstrated:

- Flights should be booked well in advance using the most cost effective ticketing arrangements
- For flights over six hours duration, business class travel is justifiable on health and work-related grounds
- All air tickets should be booked through the Trust Finance Team using the appropriate School's Trust debit card
- All air travel **MUST** be authorised by the CEO or, in the case of the CEO, the Chair of Trustees

STAFF TRAVEL, EXPENSES AND ALLOWANCES POLICY

6. SUBSISTENCE EXPENSES AND ALLOWANCES

Members of staff may incur additional costs when undertaking Trust related work away from school, not as part of the 1265 Directed Time hours. This could include expenses for School Business and/or allowances for Outreach commitments.

Expenses:

- Receipts must be submitted when claiming for breakfast, lunch and/or dinner so that actual purchasing costs can be reimbursed (see important information below)
- Expenses must be claimed using the approved expenses claims form
- Costs will be refunded to staff via Payroll. Refund of expenses by cash will only be approved in exceptional circumstances and when agreed by the Headteacher
- Claims for meals and overnight accommodation will not be honoured when already provided as part of a course/conference/events package
- Overnight accommodation must be booked through the Trust Finance Team using the appropriate School's debit card

Note: Costs cannot be reimbursed if claims are not accompanied by appropriate receipts

Meals and overnight accommodation will be reimbursed (subject to prior authorisation) up to the following **maximum** amounts:

Claim for Expenses	Location	Maximum rate per night ex VAT	Max allowance Ex VAT
Overnight	London	£160.00	
Overnight	Outside London	£100.00	
Overnight (claimed as an allowance)	Private arrangements	£25.00	
Breakfast if travelling before 8am and not included as part of package			£8.00
Lunch if not part of the course/ conference/ event			£12.00
Evening meal if arriving home after 7.30pm or staying overnight			£20.00

Allowances:

- Allowances must be claimed using the approved expenses claims form
- Reimbursements will only be made to staff via the payroll system, cash payments will not be approved

Claim for Allowances	Location	Maximum rate per night ex VAT	Max allowance
Allowances for undertaking additional Outreach work outside School hours	Anywhere	Not applicable	£25.00

This Policy will be reviewed by the Board of Trustees on a 3-yearly cycle

Person responsible for the Policy:	School Business Manager (Tor View School)
Colleagues affected by this Policy:	All Trust employees
Approved and adopted by Trustees:	9 th March 2017
Next Review:	2020