

Travel and Subsistence Policy

RELATING TO

All Academies of the Shaw Education Trust
for the financial year 1st September 2016 to 31st August 2017

WAS APPROVED BY THE MANAGEMENT BOARD

ON

SIGNED BY MEMBER OF THE BOARD

NAME [Print].....

POSITION.....

ADOPTED BY THE ACADEMY COUNCIL OF:

_____Academy

ON

SIGNED BY THE CHAIR OF THE ACADEMY COUNCIL

NAME [Print].....

POSITION.....

Travel and Subsistence Policy

The Shaw Education Trust will reimburse expenses that have been “wholly and exclusively” incurred whilst engaged in authorised activity on its behalf.

The Trust respects the integrity of each employee, volunteer and trustee and expects claims to be made honestly and accurately. However, any attempt to falsify any expense claim will be considered to be gross misconduct and appropriate action will be taken against the claimant and potentially the authoriser if, with reasonable care, the authoriser of the claim should have recognised the fraudulent nature of the claim.

The responsibility lies with the claimant to seek authorisation from their manager prior to incurring any cost that is not explicitly allowable under the Travel and Subsistence policy. The manager should be comfortable justifying such expenditure to the Finance Department.

Any activity that is accepted as claimable under the Travel and Expenses policy should be carried out in such a way to minimise the cost to the Shaw Education Trust, accepting that:

- The claimants health and safety should not be compromised in any way
- The overall efficiency and effectiveness of the activity needs to be considered and not just the cost
- A general test of reasonableness should be applied, both to the necessity of the activity but also the comfort and convenience of the claimant.

Approval of Expenses

No-one is able to authorise their own expenses, including any costs paid for directly by The Shaw Education Trust through travel and accommodation expenses. This also means that a more junior member of staff cannot submit a claim which includes expenses relating to their manager.

Anyone authorising a claim must take reasonable care to ascertain that the claim is reasonable and consistent with this policy.

The chairman of the Trustees should approve the expenses claims of the other Trustees and the Chairman’s expenses should be approved by the audit committee. The CEO’s expenses should be approved by the Chairman. A report should be presented to each Audit Committee of the expenses claims submitted by the Trustees and the executive management team on a quarterly basis.

The Headteacher/Principals expenses should be approved by the Academy Council. The Academy Scheme of Delegation should include the delegated responsibility for the processing of and approval of claims within the Academy.

Mileage Claims

Mileage Claims must be submitted on the Shaw Education Trust T&E100 form. A link to this document can be found on the Shaw Education Trust website.

In all cases mileage can only be claimed for genuine “business travelling expenses, determined as journeys employees:

- **Have** to make in the performance of their duties
- Make to or from a place they **have** to attend in the performance of their duties

Journeys for which are “ordinary” commuting or private travel cannot be claimed for. For the purposes of this policy “ordinary” commuting is defined as:

Travel between an employees agreed centre of mileage and:

- An employee’s home
- Any other place the employee visits for non-work reasons or
- Any place where the employee performs the duties of another job

Mileage allowance rates for casual car/motorcycle users within the Shaw Education Trust is currently:

Business miles per tax year	Small Car [under 451cc] Rate per mile	Class 4 [451cc to 999cc] Rate per mile	Class 3 [1000cc +] Rate per mile	Motorcycles
1-8,499 miles	0.45p	0.45p	0.45p	0.25p
Over 8,500 miles	0.25p	0.25p	0.25p	n/a

Subsistence Claims

Subsistence means the costs incurred just for you, or for other Shaw Trust employees, whilst travelling on company business. It includes hotels, meals and beverages. A VAT receipt must support the claim, without this, the claim must be deemed invalid.

Accommodation

The Shaw Education Trust has not set limits of what can be claimed because it recognises that costs can vary significantly from place to place and time to time. However, the following principles should always be followed:

- The standard, and therefore cost, of accommodation should be equivalent of a Premier Inn.
- The cost of breakfast and evening meal, as well as the proximity to the place of work the following day [especially if the staff member does not have their own vehicle], should be taken into account in choosing the hotel.
- Breakfast should normally cost no more than £5.00, unless taken in the hotel where the hotel’s rates apply.
- Evening meals should comprise no more than 2 courses and 2 drinks [alcoholic or non-alcoholic] and cost no more than £20.00.

Please note that the cost of newspapers, items from hotel room mini-bars, dry cleaning costs, hotel phone calls home and films viewed in hotel rooms will not be reimbursed. Additionally, alcohol not purchased as part of a meal cannot be reclaimed.

If you are away from your normal place of work:

