

Travel, Subsistence & Expenses Policy

Review Period:	Two Yearly
Person Responsible:	Director of Finance & Operations
Governing Committee:	Resources Committee
Date of Trustees Approval	February 2022
Date of next Review:	August 2024



RATIONALE

Staff and other persons across the Trust may undertake travel and other duties which result in claims for travel expenses and subsistence. The nature of the travel and subsistence may vary considerably due to a diverse involvement in a range of local, national and international initiatives.

It is important that the governance of Consilium Academies Trust reflects the community it serves. As such, the board has agreed that reasonable expenses, incurred by Trustees or Local Academy Board members, may be claimed from the Trust, subject to appropriate receipts being provided in line with the terms of the policy.

In all cases the following travel and subsistence policy procedures should be followed.

GUIDELINES

a) TRAVEL

At all times the most cost effective and/or efficient means of transport should be used. Employees should consult with the Trust's central finance team if they are in any doubt regarding the most appropriate way to travel.

Private Car Usage

Where an Employee, LAB member or Trustee, whether full or part time is authorised to use a private car, motorcycle, or bicycle on Trust business, the employee will receive an allowance as follows:

Type of Vehicle	First 10,000 miles (per tax year)	Above 10,000 miles (per tax year)
Cars & Vans	45p	25p
Motorcycles	24p	24p
Bicycles	20p	20p

Electric cars leased through Salary Sacrifice

Where an Employee, whether full or part time is authorised to use an electric car which is being leased through the Trust salary sacrifice scheme on Trust business, the employee will receive an allowance as follows:

Type of Vehicle	First 10,000 miles (per tax year)	Above 10,000 miles (per tax year)
Cars & Vans	45p (subject to tax)	45p (subject to tax)

Calculating Mileage

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.

Journeys that start and finish at the Academy or normal place of work will be regarded as normal business mileage and will be reimbursed in full.

Journeys that begin at home, travel directly to a site address and then on to the normal place of work will be reimbursed on the basis of the actual mileage less normal commuting mileage one way.

Journeys that begin at the normal place of work, travel to a site and then on to Home, will be reimbursed on the basis of actual mileage less normal commuting mileage one way

Journeys that start 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.

LAB members, Trustees and colleagues whose contracts of employment state that they are home-based are entitled to be reimbursed for all mileage incurred on Trust business.

Insurance

Employees who use their own vehicle or a vehicle registered or insured in someone else's name, on Trust business, must ensure that the insurance covering that vehicle is adequate. The cover must be sufficient to permit the employee to drive the vehicle for business purposes. The Trust's system for claiming expenses (currently Access People), will require the employee to provide evidence that their vehicle was appropriately insured, covered by an up-to-date MOT certificate (where required) and that they hold a valid driving license before a claim is submitted.

In the event of a staff member having an accident in a private vehicle without business cover, the Trust will not reimburse any costs involved.

Car Parking Charges

Car parking charges will be reimbursed on production of a valid receipt.

The Trust is not liable for any parking fines or road traffic penalties incurred by staff, regardless of circumstances.

Other Journeys

Where employees travel by bus, train or taxi to get to a site or meeting away from their base Academy, 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.

Train, coach or air travel should be pre-booked using the Trust's purchasing procedures. There is no need to incur the cost personally. If transport is not pre-booked using the Academy financial procedures, reimbursement will be made via the appropriate online claim form, via payroll/BACs, on provision of appropriate supporting documentation.

Air Travel

Where travel on business by air is more cost/time effective, this must be authorised by the Director of Finance and Operations.

Train Travel

Standard class rail travel together with the cost of reserving the seat will be paid for by Consilium Academies. The Trust's corporate contract (currently Clarity Book 2 Go) must be used to make rail bookings. All rail bookings must be authorised in line with the Clarity Book 2 Go system parameters.

First class rail travel will only be approved where first class travel is the only fare available or where advance first class travel is cheaper than a comparable standard fare.

b) SUBSISTENCE

Meals

Employees are entitled to claim subsistence expenses in the following situations:

- Breakfast – following an overnight stay or where they are required to leave home before 6.00am in order to attend a meeting, event etc..
- Lunch - where they are on a conference/seminar/training course away from their normal place of work and lunch is not provided as part of the event. Where staff are attending a Trust school away from their normal place of work, a free lunch will be offered by the school. No reimbursement will be made if the free lunch is not taken.
- Evening Meal – as part of an overnight stay or where they are working on a conference/seminar/training course away from their normal place of work and do not arrive home before 8.30pm.

Upon production of receipts, employees will be reimbursed for their actual expenditure up to the maximum daily allowances of £10 for breakfast/lunch and £25 for an evening meal.

Drinks

The cost of drinks can be reimbursed within the limits set out above, however no reimbursement will be made for alcoholic drinks.

Overnight stay away from home in the UK

All overnight stays must be booked and approved through the Trust's corporate contract (currently Clarity Book 2 Go). All accommodation requests must include a reason for travel when requesting a booking.

The cost of accommodation should not exceed £100 per night (Excluding VAT):

Where appropriate accommodation is not available within the above limit, the cheapest available option should be selected and must be approved by the Chief Financial Officer.

Overnight stays will not be approved unless it is necessary for the employee to safely fulfil the requirements of their role, considering the distance to travel from home, commute time etc.

Visits Abroad

All visits abroad must be approved in advance by the Chair of Trustees.

Where visits abroad are not subject to specific grant rules, the type of expenses eligible for reimbursement will be agreed by the employee with the Chief Financial Officer in advance. All reasonable claims for accommodation, meals, refreshments and telephone calls must be approved by the Chair of Trustees prior to reimbursement.

c) OTHER EXPENDITURE

Purchase of books, equipment and other resources

Except in exceptional circumstances where prior approval has been granted, all purchases on behalf of the school should be made via the Trust's order processing system.

Stationery/printing, post and courier costs – such purchases are processed centrally and should only be claimed in exceptional circumstances where it is impossible to use the Trust's systems and resources.

Classroom or office resources – The purchase of items that will become the property of the Trust must be made centrally via the Trust's order processing system. Staff members should not purchase such items using their own resources except under exceptional

circumstances with prior agreement from their Business Support Officer.

Such purchases will only be reimbursed on presentation of a valid receipt. Credit card slips or statements will not be accepted as evidence of business expenditure. The receipt must include the name and address of the retailer, the date of the purchase, details of what goods or services have been purchased and the value of those goods or services in sterling.

As Trustees and Local Academy Board members are providing a voluntary service, allowances will not be paid for attending meetings or any reimbursement for lost earnings. Travel and subsistence expenses can be claimed as set out in sections a and b in this policy.

Eye tests for Display Screen Equipment (DSE)

Staff wishing to claim for the cost of DSE eye tests should first seek approval from their Business Support Officer or HR Manager.

The following process must be followed:

- The manager confirms they are a VDU/DSE user.
- The manager will advise the member of staff to make arrangements to have an eye test with an optician of their choice, and to advise the optician that they need the eye test for VDU/DSE usage.
- The member of staff attends and pays for the eye test requesting a receipt (The receipt must state that this test was for VDU use).
- The Trust will reimburse the reasonable cost of DSE eye tests up to a maximum of £25 per test.

If glasses are required, a receipt and a new prescription will be required stating that corrective eye wear are needed for VDU/DSE usage.

Reimbursement will be made up to £55 to the member of staff. The prescription must clearly state that they are needed for VDU/DSE usage, if it does not, the member of staff will not receive any payment toward the cost of new eye wear.

It is anticipated that staff will need an eye test every two years and must follow this process.

Professional fees and subscriptions

Where a job description requires membership of a professional body or where membership of a professional body is commensurate with the role, staff members can claim professional fees or subscriptions to a maximum of one professional body, recognised by HMRC, provided that the fees are approved by the Chief Financial Officer.

Broadband and Internet Connections

The Trust will not reimburse staff for broadband or internet connection except for reasonable Wi-Fi connection costs when travelling on business.

Cash Advances

Members of staff who are about to embark on extended travel and will be required to incur expenditure while on the trip will be issued with a payment card holding an agreed amount of money. Authorisation for the use of these cards must be issued by the Director of Finance and Operations prior to the date of travel.

The payment cards should then be used to make necessary purchases. Receipts must be retained and submitted to the finance team within 10 working days of return. All expenditure must conform to Trust purchasing policies.

The Trust reserves the right to recover expenditure from the next salary payment where adequate documentation has not been provided, where expenditure has been incurred for personal use or where expenditure is not in line with wider Trust purchasing policies.

CLAIMING EXPENSES

All expenses, mileage, parking, taxi and subsistence claims must be made via the Trust HR and Expenses System. Payments will be made by on a monthly basis, via payroll. All claim forms must be supported by appropriate receipts. Claims must be authorised by the relevant budget holder or line manager via the online expenses system.

Trustees and LAB Members are allowed to claim reasonable expenses in line with the policy. All expense claims must be approved by the Chair of the relevant Board. The Chair of a LAB Board's expenses must be approved by the Trust Governance Manager. The Chair of Trustees' expenses must be approved by the Chair of the Resources Committee.

Payments to Trustees and LAB Members will be made by BACS and will be subject to review by the Resources Committee.

Monitoring, Evaluation and Review

The Resources Committee will review this policy at least every two years and assess its implementation and effectiveness.