



**Keystone Academy Trust**

# Travel and Subsistence Policy

Created: October 2021  
Review date: October 2022

## Introduction

All staff have a responsibility to ensure that financial and other resources entrusted to the Trust are used to best effect in order to further the best interests and the purpose of the Trust. This policy provides staff and governors with detailed guidance on the procedures to follow when incurring travel and subsistence expenses which are required wholly, necessarily and exclusively for the performance of their duties.

## Scope

Claimants – All Staff, Local Governors, Trustees and Members

The Trust will reimburse staff for all reasonable expenses wholly, necessarily and exclusively incurred in the performance of their duties, such as travel, subsistence and accommodation. Consideration should always be given to using the most practical and cost effective method of travel. HMRC requires that expenses records are kept and to facilitate this all re-imbursalment claims must be paid via each individual school on completion of a pre and post approved expenses form by the employee.

Claimants – Non Employees

Travel for candidates for interview will not be reimbursed. Other non-employees may be reimbursed with the pre-approved authority of the Head teacher / Head of School and in line with the limits in this policy.

## Staff Benefits & Entertaining

There are a number of staff benefits, made in addition to salary, which are at the discretion of the Head teacher / Head of School and have been pre-agreed by the Trustees.

- Staff undertaking lunchtime supervisory duties by sitting in the hall with children at lunchtime are allowed to claim the meal on that specific day. This is limited to twice a week per staff member. This is available to all staff.
- Flowers/non-alcoholic gifts at the discretion of the Head teacher for exceptional sickness, leaving gifts, special occasions and compassionate circumstances (maximum £25 plus delivery).
- Alcohol must never be purchased by the Trust for either gifts or entertainment purposes.
- Free lunches are only permissible (for tax reasons) if offered to all staff.

## Travel Expenses

### Authorisation, Responsibility & Procedures

All staff must submit an approved standard expense claim form to the school's Administrator within two months of the end of the month in which expenditure is incurred.

All expense claims must be pre and post approved by the Senior Leadership Team of the appropriate academy.

Mileage claims within all schools will be made within HMRC limits which are currently 45p per mile. Mileage claims must be pre and post approved and are calculated using postcodes on the AA website. This rate is to cover all fuel, maintenance costs, business insurance and wear and tear on the vehicle.

Reimbursement will be through payroll or BACS.

## **Travel Considerations**

When staff need to travel they must seek to use the most cost effective means of travel that meets the business need. This includes checking public transport costs before automatically using the car.

Staff are responsible for the cost of all travel between their home and their normal place of work as per their employment contract.

### **Journeys by Car**

Staff should seek to car share whenever possible.

Distances will normally be calculated from the postcode of the school to the postcode of the destination using the AA website unless the distance from home is closer.

The academy has occasional business use insurance for car drivers who do not usually use their own car for Academy business. This only applies to employees who would not normally be required to use their own vehicle for business use but are asked to do so on a rare occasion.

Prior to using their own vehicle for Trust business staff must self-certificate that they have a valid licence, MOT, road-worthy vehicle, and adequate insurance. If staff regularly use their vehicle on Trust business, then they must ensure that they have business use cover via their own insurer.

Any parking, Road Traffic Act fines, congestion charges or penalties incurred are the responsibility of the member of staff and will not be reimbursed by the Trust.

### **Journeys by Rail**

When travelling by rail, the cost of the standard rail ticket can be claimed. Tickets should be purchased in advance to ensure the best available rate.

### **Journey by Air**

When travelling by air the most cost-effective economy ticket should be purchased (with consideration given to travel time). Cost effectiveness of airport locations should also be considered with respect to travel costs getting to the airport. Luggage costs should be reasonable and in line with the purpose of the visit.

## **Journeys by other modes of travel**

Costs for necessary business travel on other modes of public transport can be reclaimed on the standard expense form when accompanied by a valid receipt.

## **Overnight Accommodation & Subsistence**

There will be a presumption against the need for overnight accommodation and subsistence especially if the associated cost exceeds the travel costs of repeated journeys.

Overnight stays must be pre-approved by the Head Teacher/Head of School. If there is a practical need for overnight accommodation a maximum of £90 per night (£130 in London) will be paid via an authorised expense claim accompanied by a VAT receipt. Where possible the Academy will pre-book and pay for the hotel directly. The standard of the hotel should be in line with a Premier Inn.

Breakfast should be included in the £90 per night where possible.

Using HMRC guidance issued in April 2016 as a basis, staff can claim up to £5 for a meal (food and non-alcoholic drink) if they are absent from their normal place of work of 5 hours or more. They can claim up to £10 for all meals if they are away for more than 10 hours, and £25 if they are away for more than 15 hours.

Minibar, alcohol, room service, newspapers, tv/dvd bills etc. will not be reimbursed.

All expenses will be refunded through payroll or BACS.

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