Four Cs
Multi-Academy Trust

Curiosity Confidence Courage Constancy

# TRAVEL AND STAFF EXPENSES POLICY

Presented to:

Full Trustees
1 October 2026

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| Date approved:[1] | 5 October 2017 |
| Date reviewed:[2] | 1 October 2026 |
| Date of next review:[3] | Autumn 2029 |

[1] This is the date the policy was approved by the meeting
[2] This is the date the policy was reviewed prior to its approval above
[3] This is the date as set by the policy review clause or the date approved plus three years

Footnote:
- Headteacher also means Head of College and Principal
- School also means College, Academy or Academies
- MAT refers to Multi-Academy Trust

# Travel and Staff Expenses Policy

## Purpose:

Four Cs MAT employees may claim reimbursement in respect of actual expenditure incurred by them, arising from attending meetings, training and conferences and purchases made on the MAT / school's behalf. All purchases made on behalf of the MAT / school must be approved by the budget holder prior to purchase.

All staff have a responsibility to protect the assets of the Multi-Academy Trust (MAT). This policy is intended to provide staff with detailed guidance on the correct procedures to follow when claiming travel and subsistence expenses

1. **Procedure**

1.1 **Categories of Claimants**

a) Staff – Schools will reimburse staff for all reasonable expenses necessarily incurred in the performance of their duties, such as mileage and rail fare associated with travel to and from meetings, training etc. There are special rules regulating specific types of claims and these are set out below. Consideration must always be given to using the most practical and cost-effective method of travel and car sharing should always be a consideration. All reimbursement claims will be settled by the school's Finance Office on receipt of correctly approved form.

b) Non-employees – Travel for candidates for interview and for other non-employees may occasionally be reimbursed. Application for reimbursement must be made by a "candidate expenses claim" form which must be approved by the Senior Manager with HR, personnel and recruitment responsibilities.

1.2 **Authorisation and Responsibility**

a) All staff must submit expense claims to the budget holder for approval within one month of the end of the month in which the travel or expenditure was incurred.

b) It is the responsibility of the budget holder to validate the claim and to ensure that the amounts claimed are justifiable, represent value for money and are correctly coded.

1.3 **Modes of Travel**

a) Home to School Travel – Staff are responsible for the cost of all travel between their home and their normal primary place of work.

b) Public Transport – The use of public transport is encouraged and must be used where possible and cost effective.

c) Mileage Rates – Mileage rates for the relevant mode of transport as shown below: They will be calculated using the shortest route to and from the required destination.

| Mode of transport | Mileage rate for travel under 10k miles per year | Mileage rate for travel over 10k miles per year |
|---|---|---|
| INSET mileage | 55 pence per mile | 25 pence per mile |
| Essential Car User | 55 pence per mile | 25 pence per mile |
| Motorcycles | 24 pence per mile | 24 pence per mile |
| Bikes | 20 pence per mile | 20 pence per mile |
| Leased car | Reviewed with current H M Revenue & Customs advisory rates | Reviewed with current H M Revenue & Customs advisory rates |
| Non-Employee Cars And Vans | 40 pence per mile | 25 pence per mile |

d) Use of Private Cars on Long Journeys– Private cars can be used for journeys below a 200 mile round trip. It is generally more cost effective to use an alternate method for journeys greater than this. Where a journey of greater than a 200 mile round trip is to be undertaken in a private car, prior approval must be sought from the line manager. Drivers undertaking long journeys must make regular stops to increase their well-being and alertness.

e) Fines – All drivers must note that any parking, road traffic fines, congestion fines or penalties incurred are their personal responsibility and will not be reimbursed by the School / Trust.

f) Insurance – Drivers must ensure that their own private vehicle is adequately insured for business use, as the driver is personally liable for any incident. Those using their own vehicles for school business will need to complete an online Annual Motor Declaration form (see appendix 1).

g) Road worthiness of Private Vehicles – It is the responsibility of drivers to ensure the road worthiness of their vehicle and that the vehicle meets all the requirements of the Road Traffic Act.

h) Taxis – When travelling by taxi, a receipt must be obtained from the driver. Where possible, the claimant must obtain prior approval from an approved signatory before using a taxi. Travel by taxi must be kept to a minimum and normally only under the following circumstances:

   a) Where heavy baggage or equipment is being transported;
   b) Where no public transport is available;
   c) When a member of staff has a temporary or permanent mobility issue, or;
   d) Where personal security is an issue.

i) Rail – For all journeys, staff will be expected to travel standard class, unless otherwise specified in their terms and conditions of employment. All rail tickets must be booked at least two weeks in advance by the school for the tickets to be delivered ahead of the journey.

j) Air – Where it is the most cost effective method of travel, staff may opt to travel by air. The claimant must obtain prior approval from an approved signatory before booking air travel. Colleagues will be expected to travel economy class.

k) Parking, Congestion and Toll Charges – Drivers will be reimbursed for Parking Congestion and Toll Charges incurred subject to production of receipts, where available. Congestion Charges will only be reimbursed at the daily rate, so the driver must ensure that payment is made before the deadline.

1.5 **Day subsistence**

a) When staff are on trips, they will follow the same meal arrangements as the students on the trip.

b) When staff are working away from the school and meals are not provided as part of the purpose for travelling, and staff are away from the work place for a period greater than 5 hours within the day, staff are entitled to reimbursement of up to £5 for the cost of a meal. Where staff are away from home and the work place for a period greater than 10 hours, colleagues are entitled to a reimbursement of up to £10.

c) Under no circumstances will the cost of alcoholic beverages be reimbursed.

1.6 **Overnight Subsistence**

a) When travelling requires an overnight stay, the daily rate of reimbursement for meals is up to £25 for each 24 hour period.

b) Where the accommodation includes breakfast, the rate is reduced to £17.

c) Where any meals are provided as part of the purposes for travelling, ie meetings, conferences, and training courses, the rate is reduced by £5 for lunch provided and £12 for dinner provided.

1.7 **Gratuities**

a) Gratuities are treated as discretionary costs by the Inland Revenue. As such, any reimbursement is treated as a taxable benefit. Therefore, gratuities will not be reimbursed.

b) Service charges included within the overall cost of the meal are acceptable and will be reimbursed as part of the usual expenses claim.

1.8 **Advances for Travel Costs**

a) Only in exceptional circumstances will advances be made to employees to assist in covering travel costs. Advances must be approved by the Headteacher. Any offer of advance is conditional upon acceptance of a potential salary deduction.

b) Where advances are given, all unused funds, claim forms and receipts must be submitted to the school's Finance Office **within 10 days of the last day of travel.** Any advanced funds not accounted for by receipts or returned must be reimbursed by the employee. Any advance outstanding after 30 days may be deducted from an employee's salary without prior notification.

1.9 **Accommodation**

a) Overnight stays must be pre-approved by the relevant authorised signatory.

b) Staff are reminded of the need to demonstrate value for money and reasonableness of expenditure when selecting accommodation.

1.10 **Reimbursement**

a) Staff will only be reimbursed for expenditure upon completion of the appropriate claim form provided by the school and after authorisation of the claim by the approved signatory.

b) The school will reimburse any claim within two weeks of receipt by the Finance Office by BACS payment.

c) Appropriate detailed VAT receipts or invoices must be attached as substantiation of expenditure incurred with clear explanation of the journey etc. Where receipts are not available, ie for toll charges or underground fares, the reason for their unavailability must be given.

2. **Loyalty Cards**

a) Personal loyalty cards must not be used for School / Trust expenditure.

3. **Review**

The Trustees (Resource Committee) will review this policy in line with the procedure for policy review.

Date for review - if no other reason for review (see policy review procedure) this policy will be reviewed in 3 years.

**Appendix 1**

# Four Cs MAT

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The following is wording used in the online annual motor declaration

## Annual Motor Declaration for staff owned vehicles

## DECLARATION REGARDING INSURANCE COVER AND ROADWORTHINESS OF PRIVATE STAFF OWNED VEHICLES USED ON OFFICIAL SCHOOL BUSINESS

**When using your vehicle for business purposes you must:**

- **Check that you have adequate insurance cover**
  Commuting to and from your usual place of work, is not generally classed as 'business use'. However, if you commute to a location that is not your usual place of work (e.g. to attend a training course or meeting), or if you use your vehicle to travel in relation to your work during your working day, then this will be classed as personal business use. Your insurance certificate should clearly state what use is permitted under the terms of your policy, but if this is not clear, please contact your insurance company for confirmation. Note: standard personal business use does not always include carriage of school pupils.

- **Think before transporting pupils in staff vehicles**
  Where pupils are to be transported in staff cars the vehicle insurance must include business use and this use must include carriage of pupils. If this is not clear from your insurance documents, please contact your insurance provider to check. HR / Finance will need to see your driving licence and insurance certificate before you can transport students in your private car. The vehicle must be taxed and maintained to the legally required minimum standard, and the staff member must hold an appropriate licence. Where practicable, parents must agree to participants travelling in staff cars. Where the journey is not planned or it is not practicable to get parental consent, staff should aim to get the approval of the Headteacher or Deputy.

  In all cases staff should:

  - Have the approval of the Headteacher (where practicable)
  - Try to avoid carrying lone pupils – where possible carry 2 or more depending on the size of the vehicle
  - Direct pupils to use the rear seats. Where practicable, staff should discourage pupils from travelling in the front seat
  - Ensure all occupants wear seat belts
  - Comply with the Education Visits Procedure for all planned trips.

- **Notify any work related road incidents and comply with road traffic legislation**
  If you are involved in an accident or incident, or if you receive a motoring conviction or fixed penalty notice whilst using your vehicle for business purposes, you must notify your Line Manager as soon as possible. Please note that staff are expected to abide by all road traffic

and parking laws whilst using their vehicle on business, and may face disciplinary action if they fail to do so. Any fine incurred will be the responsibility of the employee and will not be reimbursed by the school.

- **Comply with mobile phone legislation**
  It is a legal offence to use a hand-held mobile phone whilst driving. Any fine incurred will be the responsibility of the employee and will not be reimbursed by the School / Trust. The employee may also face disciplinary action.

- **Ensure you have the approval of your Line Manager**
  This is particularly important if you will be carrying pupils, and/or if you wish to claim mileage allowance.

- **Claiming travel expenses**
  Please see the Finance Office for details of how to claim mileage and travel expenses. No journey can include a home commute (mileage between home to your nominated place of work.) Any milage will be deducted from any travel costs / claims. (HMRC compliance).

**I certify that I have read and understood the guidance and the payment allowance to persons using their private cars on official school business.**

| | **Please tick** |
|---|---|
| I have fully comprehensive and business use insurance | |
| I declare that my vehicle is taxed and roadworthy | |
| I have a valid MOT certificate, if applicable | |
| My tyres are legal (minimum 1.6 mm across ¾ of the tread) | |
| I have a current and up to date driving licence | |
| I have no more than 6 points on my licence | |
| I have no endorsements for dangerous driving, drink driving and drugs, driving without due care and attention | |
| I am able to read in good daylight a number plate at 20.5 metres (67 feet), and, if glasses or corrective lenses are required to do so, these will be worn whilst driving. | |

**Signature: ……**

**Name: ……**

**Date: ……..**

**This form will be issued annually to all relevant staff (usually online).**

Footnote:



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