

Pontefract Academies Trust

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Travel & Subsistence Policy and Procedures

Trust Board Approval Date	3 June 2015
Effective Date	1 July 2015
Planned Review Date	1 July 2016
Web Access	Intranet
Owner	Director of Finance Business and Operations

1. Travel & Subsistence Policy

- 1.1 This policy and associated procedures applies to **all** employees of Pontefract Academies Trust, this includes those employed within the central team and those employed in each individual academy school.
- 1.2 The purpose of this policy is to ensure that employees are properly reimbursed for legitimate business expenses.
- 1.3 Employee expenses will be paid by BACS, in arrears, as part of the monthly salary payment. Expenses will not, in any circumstances, be reimbursed from petty cash.
- 1.4 **Employees** are responsible for ensuring that:
- a) All claims are in accordance with this and other relevant Trust policies
 - b) Value for money is obtained at all times by:
 - Assessing the costs and benefits prior to travel to determine that the most appropriate, cost effective and economic options are chosen; and
 - Ensuring that no unnecessary costs are incurred
 - c) All documentation to support the claim is retained and attached to the claim form prior to authorisation. Expenses **will not** be paid where receipts are not provided where they are required
 - d) All claims are accurate, complete and are submitted within three months of travel or the incurring of the expense
- 1.5 The expenses of the **Chief Executive Officer** must be authorised by the Chair of the Trust Board or an appropriate person delegated authority in his/her absence.
- All **Headteacher** and **central trust employee** expenses **must** be authorised by the Chief Executive Officer or an appropriate person delegated authority in his/her absence.
- All **other employee** expenses must be authorised by an appropriate authority as determined by the Headteacher of each individual academy school.
- 1.6 It is the **responsibility of the authoriser** to:
- a) Ensure that staff expense claims comply with this policy and apply the relevant rules and rates accurately;
 - b) Ensure value for money has been obtained by the claimant;
 - c) Give prior approval where necessary;
 - d) Ensure all receipts and additional evidence or explanations in support of the claim are attached to the claim form.
- 1.7 There may be **exceptional** circumstances which mean that this policy cannot be applied. These should be pre-approved by either the Chief Executive Officer or the individual academy school Headteacher, with full documented evidence to support why applying the policy would leave the employee in an unreasonable circumstance.

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- 1.8 Submitting or authorising claims which do not adhere to this policy may be treated as misconduct and dealt with through the Trust's Disciplinary Procedures and in some circumstances may lead to criminal prosecution.
- 1.9 The Chief Executive Officer and Headteachers at each individual academy school have the responsibility for ensuring the Travel and Subsistence Policy and Procedures are effectively implemented.
- 1.10 This policy will be reviewed on an annual basis, or as otherwise directed by the Chief Executive Officer, change of Trust policy, or legislative changes.

2. Travel Expenses

2.1 Definition of Business Travel

Business travel does not include travel between an employee's home or permanent work place (s).

Business travel claims may be made for all travel from permanent work place to temporary work place or temporary work place to other temporary work place.

In addition, business travel claims will also be payable which involve travelling to a temporary location directly from home without visiting the permanent workplace, or will involve returning home at the end of the working day without visiting the permanent work place. The Trust provides the "**lesser than rule**" to ensure that some mileage is payable for these journeys. This is to recognise that the employee is travelling in the most efficient way, reducing unnecessary congestion and environmental damage.

If an employee makes a journey from home directly to a location other than his/her permanent work place, for that part of the journey, they can claim whichever is the lesser of either:

- Home to temporary work place or
- Permanent work place to Temporary work place

Example 1: Travelling directly from home to a temporary work place

Home to Permanent work place	= 15 miles
Home to Temporary work place	= 20 miles
Permanent work place to Temporary work place	= 12 miles

The business travel claimable is defined as 12 miles in this example

Example 2: Travelling directly from home to a temporary work place

Home to Permanent work place	= 20 miles
Home to Temporary work place	= 10 miles
Permanent work place to Temporary work place	= 15 miles

The business travel claimable is defined as 10 miles in this example

2.2 Travel using the employees' own vehicle

Employees driving on official business for the Trust **must** ensure that the vehicle they are driving/travelling in has a valid MOT, is fully licensed, maintained and insured for 'business use'. The driver **must** hold a current UK driving licence which is valid at the time of the journey. An employee who does meet any one of these requirements **must** not undertake any driving on official business.

The Trust may request information to support this position in advance of paying a

2. Travel Expenses

claim as part of an annual internal check process.

The Trust accepts no liability for accident, loss, damage, fines or penalties which may be incurred during any journey.

Employees must endeavour to drive in a safe and courteous manner and adhere to the requirements of the 'road traffic act and the highway code'. Where an adult transports a child / children as part of their duties they must ensure they are aware of current legislation, adhere to the use of car seats for younger children, and safer working practice requirements.

	Rate per mile*
Private Car	45p
Motor Cycle	24p
Pedal Cycle	20p

**In accordance with HMRC rates. The HMRC mileage rate is designed to take into account the the costs of buying, running and maintaining your vehicle, such as fuel, oil, servicing, repairs, insurance, vehicle excise duty and MOT. The rate also covers depreciation of the vehicle i.e. it's loss in value over time. An employee cannot make additional claims for any of these things.*

2.3 Parking

The Trust will reimburse parking when attributable to a necessary business journey. Receipts must be attached to the claim form for authorisation.

2.4 Travel by Rail

Staff must make the maximum use of travel facilities that offer value for money. Therefore travel must be standard class (unless it can be evidenced at the time of booking that first class was cheaper and this is pre-approved by the authoriser) and advantage should be taken of value for money opportunities such as dual single tickets, day returns, off peak tickets, and advance tickets.

2.5 Travel by Taxi

The use of taxis should be kept to exceptional circumstances where:

- There is no suitable public transport available;
- Heavy baggage is being carried
- A number of employees are travelling together which makes this option better value than public transport
- Health and safety, mobility impairment or personal security is an issue, including travelling late at night or very early in a morning.

The authoriser should ensure that at least one of these conditions has been met and support evidence / receipts are provided.

2. Travel Expenses

2.6 Subsistence

Payment will be made to staff where expenses are incurred on official work business up to the levels set out below:

Morning expenses **up to a maximum of £4.65** paid where an employee begins business work away from the home and outside the Wakefield District more than one hour before their contractual start time.

Evening allowance **up to a maximum of £8.26** to be paid where an employee is still working away from home and outside the Wakefield District more than two hours after their contractual finishing time.

General out of pocket expenses **up to a maximum of £8.26** will be paid for any overnight stay.

Where an employee is on an overnight stay and an evening meal or breakfast is not included in with the accommodation a maximum of **£21.17** can be claimed reflecting the morning expenses, evening allowance, and out of pocket expenses.

Under no circumstances shall re-imburements be made for purchases of alcoholic beverages.

2.7 Accommodation

Economical class accommodation may be booked where employees cannot reasonably be expected to make the return journey in the same day. Prior approval is required by either the Chief Executive Officer (Headteachers & central Trust based employees) or Headteachers of individual schools (school based employees).

Travel and Subsistence Claim Form

School:

To avoid delay in payment all Claims must be received by the School Business Manager / Finance Office by the date notified. Claims should be made within three months of the travel / expense taking place, failure to submit within this time period will not be authorised.

Name		Claim for period ending	
Employee Number		Job Title	
Home Address	Vehicle Registration Number		
	I confirm that the above vehicle is insured for business use & has a valid MOT certificate (Y/N)		I confirm that I (the claimant) hold a full and clean driving licence (Y/N)

Travel Allowance							Subsistence / Expenses	
Date	From (starting point)	To (places visited, , name of passengers final destination)	Reason for Journey	Car/ Bike/ M/cycle	Claimed Miles	Unpaid mileage	Details A-Accommodation B-Breakfast T-Tea R/B/TU/TA – rail/bus/tube/taxi	Amount Claimed £p
Brought Forward Overleaf							Brought Forward Overleaf	
Total Miles Claimed / Unpaid							Total Subsistence/Expenses Claimed	

I hereby certify that prior to making this claim I have read, understood and adhered to all the requirements of the Pontefract Academies Trust Travel and Subsistence Policy.		I hereby certify that prior to authorising this claim I have read, understood and adhered to all the requirements of the Pontefract Academies Trust Travel and Subsistence Policy.	
Claimant Signature	Date	Authoriser Signature	Date

All receipts and supporting documents for each claim must be attached and retained with this document for a period of 7 years.

