



# The Castle Partnership Trust

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## Staff Expenses

**Date: April 2021**

CEO: Sarah Watson

Headteacher Court Fields School: Polly Matthews

Headteacher The Castle School: James Lamb

Headteacher Wellesley Park School: Carly Wilkins

Headteacher Isambard Kingdom Brunel School: Richard Healey

Due for review: April 2022

## **Introduction**

The school will, from time to time, require employees to travel on business and to temporarily stay away from home in the course of their work. The aim of this policy is to provide guidance on the appropriate travel and accommodation arrangements.

The objectives of the policy are:-

- To secure best value for money public transport and hotel rates
- To provide reasonable standards of comfort, convenience and safety for employees who are required to travel on School business.

This policy covers:-

- Business travel by public transport including taxis
- Temporary accommodation, hotel expenses, that are a result of work requirements
- Business mileage
- Car parking

## **Responsibilities**

The Board of Directors is responsible for the content and monitoring of this policy, and reserves the right to alter the content to meet the needs of the Trust. The Chair of the Trust is responsible for authorising the expenses claims of the Headteachers.

The Headteachers are responsible for ensuring employees have access to this policy, including new staff.

The Business Managers and office staff are responsible for the correct implementation of the policy.

The Employee is responsible for ensuring any expenses incurred are authorised by the appropriate budget holder and that all expenses are incurred in line with this policy.

## **Principles**

The lowest cost option must always be chosen provided this is consistent with the required convenience and speed of travel. It is recognised that some travel may involve long journeys and 'unsociable' hours. This policy is intended to fulfil the business requirement of the journey in a way that does not unduly inconvenience the employee.

All public travel and accommodation must be booked via the Finance Team where at all possible. They will be booked using the school's credit card. When it is not possible to book using the school's credit card and payment is made by the member of staff, then a reimbursement will be made when a proof of purchase is provided and an expenses claim form is completed.

All public transport, mileage and accommodation must be authorised by the appropriate line manager. Where this is related to professional development it must be approved by the member of SLT responsible for the CPD budget.

When it is necessary to stay overnight the school will reimburse reasonable hotel expenses. All bookings must be made via the Finance Team. Where conference booking does not include the cost of hotel

accommodation, the maximum hotel rate per night reimbursed, inclusive of VAT and breakfast will be £180 (London) or £125 (all other locations).

In exceptional circumstances, where hotels have not been pre-booked through the Finance Team, hotel bills should be paid using a personal credit/debit card and an appropriate VAT receipt should be obtained. Expenses will be reimbursed following submission of Expenses Claim Form with appropriate receipts.

All rail travel will be at standard class. Tickets should be booked well in advance (at least three weeks where possible) via the Finance Team.

When travel involves an overnight stay, the cost of an evening meal can be claimed up to maximum value of £15. When the duration of travel is longer than 5 hours, the cost of lunch up to a maximum value of £7 can be claimed. Receipts must be obtained for all meals and attached to Expenses Claim Form.

Where an employee uses their own car for travel, business mileage may be claimed at the rate of 25.9p per mile. Related expenses such as car parking charges and toll road charges will be reimbursed on production of receipts.

The school will not reimburse:-

- The cost of any alcoholic beverages
- Cost of family member travelling with a School employee
- Fines for traffic offences
- Personal travel insurance or insurance on personal property
- Items for personal use
- Loss of personal property, cash advances, tickets

In exceptional circumstances, and with agreement in advance, the school may reimburse legitimate expenses over and above that outlined in this policy. Where the total of these exceptional expenses is greater than £50, approval will be sought from the Business Committee.

## **Breaches of the Policy**

Where an employee is found to have breached this policy by deliberately and wilfully falsifying expenses claims the school will regard this as a serious disciplinary matter which will be dealt with under the Trust's disciplinary policy.

## **Monitoring and Review**

The Board of Directors will review the content and expenses rates within the policy at least once every two years.

The Business Managers will report exceptional expenses claims to the Business Committee and provide data relating to all expenses claims on request.