Staff Travel Policy

Category:	Trust-wide Policy
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Next Review Date:	April 2027 Rates reviewed annually in April

Version Control

Ver.	Date	Comment
3	April 2018	
4	April 2021	Cyclical review Rates are now in line to HMRC guidance and the expenses policy for Trustees/Members
4.1	April 2023	Rates reviewed
4.2	November 2023	Update to paragraph 2.1 re. business insurance
5	April 2024	Cyclical review. All travel allowances and rates are unchanged; lunch/refreshment rate increased to £15pd
5.1	May 2025	Cyclical review of rates.
5.2	December 2025	Raising of accommodation allowances to reflect current business need.
5.3	April 2026	Rates reviewed against HMRC guidance

This policy will be subject to ongoing review and may be amended prior to the scheduled date of the next review in order to reflect changes in legislation, statutory guidance, or best practice (where appropriate).

Contents

1. Rationale

Trust staff may be required to undertake travel and other duties which result in claims for travel expenses and subsistence. The nature of the travel and subsistence varies considerably due to the diverse involvement in a range of local, national and international initiatives.

Routine travel between sites as part of a cross-Academy role is **NOT** eligible for further reimbursement of travel costs. An annual allowance dependent on the travel band of the role already compensates for this travel. The levels of this annual allowance will be reviewed annually (see Appendix 1).

Travel on Trust business outside the normal role of a member of cross-Academy staff will be reimbursed in full, provided the rules in the next sections of this policy are followed.

All staff members are recommended to consult with their line manager if they are unsure whether travel costs will be reimbursed before travelling.

Staff should follow the Staff Travel Policy as this takes into account current Inland Revenue regulations.

For a number of international projects the level of travel and subsistence is dictated by the provider of the funding for travel and in these cases the Trust should adhere to the provider's rules and levels.

2. Travel

2.1. Private vehicle - Insurance

Employees who use their own vehicle or a vehicle registered or insured in someone else's name, on academy business, must ensure that the insurance covering themselves and the vehicle is adequate. The cover must be sufficient to permit the employee to drive the vehicle on Trust business.

Where staff, at the request of the Academy, are transporting pupils additional costs related to Business Insurance may be eligible for reimbursement.

2.2. Private vehicle – Casual car user allowance

Where an employee, whether full or part time, is authorised to use a private car or motorcycle on Trust business, the employee will receive an allowance in accordance with the rates set out in Appendix 2.

2.3. Private vehicle – 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 begin at home, travel directly to a site address and then on to the school will be reimbursed on the basis of the actual mileage less normal commuting mileage one way.

Journeys that begin at school, 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 and finish 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.

For the avoidance of doubt mileage claims involving a journey to school will be supported by a standardised form clearly showing the actual mileage covered, less the normal commuting mileage.

2.3.1. Congestion/emission zone and toll charges.

Any congestion/emission zone charge or bridge/tunnel/road toll fee incurred on a journey for Trust business which is not a journey each way from home to work and work to home on a normal/contractual working day, will be reimbursed only upon the submission of a valid receipt or statement from the relevant levying authority upon which the relevant journey(s) is(are) clearly marked.

2.4. Private vehicle – car parking charges

Car parking charges will be reimbursed only 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.

2.5. Claim forms

All mileage, parking, taxi and subsistence claims must be paid via claim forms and not via petty cash. This ensures the correct information is available to the Inland Revenue, and for calculating P11D returns.

Claims should be made on a regular basis and should be authorised, checked and signed by Authorised School Signatories before sending to the school office, or line manager/central finance team for central staff.

The timetable for submitting claims is the 15th of each month following the month to which the claim relates.

Claims should be submitted within 3 months of being incurred . After this date claims will not be processed.

2.6. Other journeys

Where employees travel by bus or train or taxi to get to a site or meeting away from school, then reasonable expenses, supported by receipts, will be reimbursed in full. The most cost effective and/or efficient means of transport should be used at all times. All claims are required to clearly state the date, origin, destination and reason for travel.

Wherever possible train, coach or air travel should be pre-booked in order to achieve the best possible value for the Trust.

Reimbursement will be made via the appropriate claim form, via payroll, on provision of appropriate supporting documentation.

Taxis should only be used when it is not reasonably practicable to use public transport (e.g., because of exceptionally late end to meeting or because quantities of materials need to be carried).

2.7. Train travel

Standard class rail travel together with the cost of reserving the seat in advance will be paid. First class travel will not be paid except in exceptional circumstances approved by the Head (for school staff) or Deputy CEO or Chief Operating Officer (for central staff) or where it can be proven that a first-class ticket is cheaper than a standard fare on the equivalent journey.

2.8. Air travel

Air travel being paid for using Trust/school funds will always be in economy class, although booking a business class fare and recharging the Trust the economy price would be acceptable. The exception to this is when a fee is being received by the Trust from which the cost of appropriate travel will be borne.

Where travel on business by air is required and being paid for by the client, the level of travel dictated by the provider of the funding (in accordance to their rules and levels) will be adhered to.

In cases where travel on business by air is required, the Trust is receiving a fee for that work and where the level of travel is not dictated by the provider of the funding, the following rules shall apply:

- Where travel flight duration is up to and including five (5) hours an economy seat must be booked.
- If the flight duration is greater than five (5) hours and up to and including eight (8) hours then premium economy may be booked where available.
- If the flight duration is greater than eight (8) hours then business class may be booked.
- For flights of between five (5) and eight (8) hours duration, where premium economy is not available, then business class may be booked providing there is no alternative carrier with premium economy provision available.

For the avoidance of doubt, flight duration refers to the actual scheduled flight time advertised in advance by the airline. This means the actual amount of time spent in the air and does not include aircraft changes and layovers. The exception to this is advertised technical stops which are built into the flight time.

The difference in cost between economy and premium economy or business class should be borne by the provider of the funding where possible. If the cost of upgrades is not borne by the provider of the funding then the Trust can bear the cost provided that this is covered by any relevant fee income. Where possible it is preferable that this cost is built into any relevant fee income thus maximising revenue for the Trust.

3. Subsistence

Employees are entitled to claim subsistence expenses in situations where they are working or are on a conference, seminar or training course away from school, and do not arrive home until after 10:00pm, and are more than 30 miles from school or home.

Upon production of receipts, employees will be reimbursed for their actual expenditure up to the maximum allowances set out in appendix 2.

Employees required to leave home before 6:30am in order to attend a meeting, event etc, may be reimbursed for breakfast up to the maximum allowances set out in appendix 2.

Claims should be submitted on the monthly car allowance claim form.

Claims will only be reimbursed in cases where the relevant meals are not provided as part of the event package.

3.1. Drinks

No reimbursement will be made for alcoholic drink when on Trust business. The only exception to this is when it forms part of a pre-arranged meal/entertainment package and will be subject to approval in advance by the Head, Deputy CEO or Chief Operating Officer.

3.2. Refreshments

When attending exhibitions, reasonable claims for refreshments and lunch during the day will be reimbursed up to the maximum allowances set out in appendix 2.

3.3. Overnight stays away from home in the UK

When meetings, conferences, events involve one or more overnight stays away from home, the type of expenses eligible for reimbursement will be agreed with the Head, Deputy CEO or Chief Operating Officer in advance. If the event/conference requires residential accommodation, all reasonable claims for accommodation and expenses will be met.

Except in exceptional circumstances or with the prior approval of the Head, Deputy CEO or Chief Operating Officer, accommodation (i.e. bed and breakfast) and evening meal charges should not exceed the maximum allowances set out in appendix 2.

Payment will only be made on actual expenditure supported by receipts. Where an employee chooses to exceed the maximum amount, the Trust will only reimburse to the maximum level and the employee will bear other costs.

3.4. Visits abroad

Where visits abroad are not subject to specific funding provider rules, the type of expenses eligible for reimbursement will be agreed by the employee with the Head, Deputy CEO or Chief Operating Officer in advance. For guidance, reasonable claims for accommodation, meals, refreshments and Trust work related telephone calls will be reimbursed where these are not supplied by the provider of funding for the visit.

For international travel, a daily subsistence rate of GBP10.00 (£10.00) for each night stayed abroad may be payable with the prior agreement of the Head, Deputy CEO or Chief Operating Officer.

Appendix 1: Central team tariff matrix

In order to reduce time and bureaucracy, a tariff system has been identified for members of the central team that will result in an annual, salaried and therefore taxable payment. This appendix therefore details the current tariffs in relation to the Eden Academy travel policy and the methodology for assigning a particular tariff to a staff member.

This appendix will be reviewed on an annual basis by the finance committee.

Methodology

Staff members belonging to the central team (or any other member of staff deemed to be undertaking frequent and regular journeys) should discuss their potential tariff level with their line manager on an annual basis in order to allocate a suitable tariff.

Discussions should be based on journeys that are deemed 'regular and frequent'. By regular and frequent, that would mean predictable and weekly journeys. Other journeys that may take place sporadically (e.g. home visits and out of hours meetings) that are not weekly should therefore be claimed for separately. Staff members should come to this meeting prepared to indicate their working pattern over the previous month.

The line manager will inform the Chief Operating Officer about the outcome of the discussions.

Tariffs

- Tariff 1: 1 or 2 journeys every week @ £250pa
- Tariff 2: 3 to 5 journeys every week @ £600pa
- Tariff 3: 6 or more journeys every week @ £900pa

Those staff who undertake irregular journeys, outside of their regular work routine, should continue to claim expenses for this via the travel claim system.

The timetable for submitting claims is the 15th of each month following the month to which the claim relates.

Claims should be submitted within 3 months of being incurred. After this date claims will not be processed.

Appendix 2: Mileage and subsistence rates, April 2026

HMRC approved mileage rates; where Members, Trustees or LAB members use their own vehicle

Vehicle type	First 10,000 business miles in the tax year	Each business mile over 10,000 in the tax year
Cars and vans	45p	25p
Motorcycles	24p	24p
Bicycles	20p	20p

Subsistence

Only claimable if an overnight stay is involved and must reflect the actual cost of meals/beverage up to a maximum of:

Type	Allowance	Notes
Breakfast	Maximum £8.00	If leaving home before 6:30am on the day of outward travel
Lunch and/or refreshments	Maximum £15.00 per day	
Evening meal	Maximum £20.00	If returning home after 10:00pm on the day of inbound travel or away
Overnight Stay (B&B) If a higher rate is required this must be agreed with the Head or Chief Operating Officer in advance	Maximum of £180.00 per night	Inside London
	Maximum of £130.00 per night	Outside London

For international travel, a daily subsistence rate of £10.00 for each night stayed abroad may be payable with the prior agreement of the Head, Deputy CEO or Chief Operating Officer.

The Finance Committee will review subsistence rates annually.