

Oakfield Lodge School



Travel and Expenses Policy

Written by: CE HR
Reviewed by: SN
Last review: November 2020
Next review: November 2021

SCOPE

This policy is applicable to all employees of **Oakfield Lodge** expenses are incurred in the performance of their duties during the course of employment. This policy covers public transport fares, taxi fares, air travel, use of own car, mileage claims, mileage rates, expenses (parking and toll charges, meals and overnight stays) and false claims.

PRINCIPLES

The school is committed to ensure that a consistent approach is in place in respect of the reimbursement of expenses incurred by employees in the performance of their duties with the school.

Such expenses will be reimbursed on the basis of expenses being reasonable and being evidenced appropriately.

Employees and managers should always consider whether or not travel is necessary to meet business objectives or if there are more appropriate means, e.g. teleconferencing or videoconferencing.

GENERAL

Official journeys should always be made in the most economical way and this will mean that public transport should normally be used (where applicable) for longer journeys. Head teachers may require employees to have special approval in advance for journeys by car outside of the County.

To claim for expenses, employees must use the expenses claim form provided by the school. Where incomplete or insufficient information is recorded, the claim should be returned to the employee and not processed for payment.

Approving managers should always carry out a robust review on all employee expense claims. This should include checking previously submitted claims to ensure that the amount claimed reflects the journeys undertaken and that the claim is not a duplicate. Likewise, employees should make every effort to check the detail of their claims to ensure accuracy and avoid duplication.

Managers may not certify claims submitted more than 3 months in arrears. Exceptionally, where the employee can demonstrate that it was not possible to submit the claim within this timescale, the claim may be approved (the only likely such circumstance will be that the employee was off sick with a condition that made it difficult for them to complete the claim).

The school will pay claims for authorised expenses by BACS transfer into the same bank account into which the employee's salary is paid.

TRAVEL

Public transport fares

It may be more economical for an employee to use public transport when travelling in connection with work. Public transport fares will be reimbursed for journeys from a work base to places visited, or for the distance from the employee's home (if the journey starts there), if less.

Employees may claim for standard class fares (not first class) when using public transport, i.e. choosing the cheapest ticket type when travelling by train, if appropriate. Furthermore, journeys

should be booked well in advance to benefit from any discounts for early booking. Any tickets should be booked with the prior agreement of the head teacher/manager.

Taxi fares

Taxi fares will only be reimbursed in limited circumstances, for example, where taking a taxi would result in a significantly shorter travel time than using public transport, where there are several employees travelling together or where personal security and safety of employees is an issue.

A receipt with details of the date, place of departure and destination of the journey must be obtained if a claim for reimbursement is to be submitted.

Air travel

Travel by air must be authorised in advance by the Management Committee. Where possible, flights should be booked well in advance to benefit from any discounts for early booking. Personal incentives or rewards associated with specific air travel, such as air miles, should not be a factor in determining which flight is purchased. The key consideration is whether or not the flight is the most cost effective means of travel, unless there is a valid business reason for taking an alternative flight. Employees are usually only permitted to travel in economy class.

Occasional car user (use of own vehicle)

It may be appropriate and cost effective for an employee to use their own car when travelling in connection with work, e.g. if the employee is travelling with several colleagues, where there is limited public transport to their destination or the journey time is significantly shorter than using public transport.

Employees undertaking business mileage by private car will be designated occasional users, and are subject to:

- holding a full UK driving licence;
- ensuring that their car is roadworthy and fully registered; and
- holding comprehensive motor insurance that provides for business use (and must cover liability for passengers, if applicable).

The school will not pay for the cost of any insurance policy on an employee's own car.

The school will be required to carry out an annual check to ensure that employees who drive a car in connection with work meet the above conditions. These checks should also be carried out whenever a vehicle has been changed. Please refer to the Health and Safety Driving at Work Policy for further guidance on management responsibilities.

Mileage claims

To claim occasional car mileage, employees should set out the distance of the journey undertaken on an expenses claim form. Each journey claimed should also include the start and end point of the journey. Whilst an exact address may not be required (or appropriate), sufficient detail should be given to allow for verification at a later date.

Where a business journey starts or ends at home, normal home to base mileage (either one trip or two depending on whether or not the base is visited) be deducted from mileage claimed, i.e. claims will be for extra miles travelled.

Mileage rates

For those designated an occasional user, mileage will be paid as outlined below.

| Occasional car users | | |
|---|--|--------------------------------|
| Support staff | Engine size 451 to 999cc | Engine size 1000cc + |
| Per mile first 8,500 | 46.9p | 52.2p |
| Per mile after 8,500 | 13.7p | 14.4p |
| Teaching staff | The mileage rate payable will be in line with the rate for vehicles with an engine size of 1000cc +. | |
| Electric vehicles Where business mileage is undertaken in an electric vehicle, the mileage rate payable will be in line with the rate for vehicles with an engine size of 451 to 999cc. | | |
| Motorcycle allowance Where business mileage is undertaken by a motorcycle, mileage will be payable at 24p per mile. | | |
| Bicycle allowance Where business mileage is undertaken by bicycle, mileage will be payable at 20p per mile. | | |

EXPENSES

Parking and toll charges

The school will pay for parking costs and toll charges incurred when travelling in connection with work. Receipts will be required.

Meals

As a general rule, meal costs are the responsibility of employees whether at or away from normal work base. However, if work demands are such that an employee necessarily expends more than they would normally then the additional expenditure will be reimbursed provided there is management approval and appropriate receipts are available.

Overnight stays

Where an overnight stay is required, accommodation should be arranged and booked by the school, and approved by the head teacher. Reimbursement of any costs of meals together with further out of pocket expenses should be discussed with and approved by management before they are incurred.

Expenses that will not be reimbursed

The school will not reimburse employees for:

- the cost of any travel between an employee's home and usual place of work;
- the costs of parking at the usual place of work;
- the cost of any travel undertaken for personal reasons; or
- any fines or penalties incurred while on business for whatever reason, including penalties for not paying for a rail ticket in advance of boarding the train and penalties or fines associated with motoring offences, including speeding or parking fines, clamping or vehicle recovery charges.

FALSE CLAIMS

If the school considers that any expenditure claimed was not legitimately incurred on behalf of the school, it may request further details from an employee. The school will thoroughly investigate and check any expenses claim as it sees fit, and may withhold payment where insufficient supporting documents have been provided. Where payment has been made prior to the discovery that the claim was not legitimate or correct, it may deduct the value of that claim from the employee's salary.

Any abuse of this policy will not be tolerated and may be dealt with under the school's disciplinary procedure.

EQUALITY

Oakfield Lodge will ensure that, when implementing the Travel and Expenses Policy, no employee will be disadvantaged on the basis of their gender or transgender, marital status or civil partnership, racial group, religion or belief, sexual orientation, age, disability, pregnancy or maternity, social or economic status or caring responsibility. This means that the policy may need

to be adjusted to cater for the specific needs of an individual including the provision of information in alternative formats where necessary.

MONITORING

Data relating to the operation of this policy will be collated and monitored regularly to ensure that the policy is operating fairly, consistently and effectively. Issues that are identified from the data will be dealt with appropriately.

REVIEW

The policy will be reviewed in the light of operating experience and/or changes in legislation and in consultation with the Trade Unions.

Prepared by: Education HR Consultancy (LG)

Date: April 2016

Useful Links: [Claim Form for Employee Expenses](#)
[Traveline – National Journey Planning Service](#)
[How to check someone's driving licence information](#)