



CONNECTED LEARNING STAFF EXPENSES POLICY

Category:	Personnel Management
Authorised By:	CL Audit, Finance & Personnel Committee
Status:	APPROVED
Date Approved:	1.7.2021
Next Review Date:	Annually (all allowances to be reviewed and approved)

Staff Expenses

Introduction

CL employees may claim reimbursement in respect of actual expenditure incurred by them, arising from attending meetings, training and conferences and purchases made on their school's behalf. Purchases made on behalf of the school must be approved by the Headteacher prior to purchase. Staff claims are to be kept to a minimum.

This Policy is in two parts: the first being for reimbursement of reasonable expenses incurred wholly, necessarily and exclusively in the course of the Trust or school business. The second part is solely for the reimbursement of the Excess Travel Allowance which is incurred when a member of staff has temporarily moved to a new work base (see below for eligibility criteria).

Eligible Expenses

Travel to and from meetings, training and conferences

- **Car Use**

Reimbursement will be at HMRC's agreed 'contractual user rate' (currently 45p per mile). It will be calculated according to the shortest route to and from the required destination with a deduction of any mileage that would normally be covered travelling to and from school if during school hours and on a day normally worked.

The Trust does not provide car insurance for staff using their own vehicles. Staff are personally responsible for ensuring that they have appropriate motor insurance cover and may be asked to provide proof of motor insurance cover and/or an MOT certificate.

Where practical, it is expected that staff will share car use. An additional 5p per passenger, per business mile, may be claimed for transporting fellow members of staff or school governors.

All claims should be made on Appendix 1 CL Mileage Claim Form.

- **Other Travel**

All claims must be accompanied by a relevant receipt or ticket. Train travel will be reimbursed at the second class rate regardless of the class of actual travel.

All claims should be made on Appendix 1 CL Expenses Claim Form.

- **Excess Travel** (see below)

Purchases made on behalf of the school

Purchases, for example, perishable items for cookery, may be reimbursed provided they are supported by the relevant receipt(s) and submitted on the correct claim form. **Authorisation must be sought from the budget holder prior to any purchase**; therefore you must be aware that, if prior approval has not been obtained from the budget holder, the school reserves the right not to reimburse the cost.

All claims should be made on Appendix 2 CL Expenses Form.

Procedure for Claiming

All claims must be submitted within three months of the date of travel/purchase, using the Trust's travel/expense claim form, signed by the claimant. The claim should be passed to the Snr Administrator who will ensure it is authorised by the Headteacher and the claim will then follow the procedure set out for processing invoices. Payment will be made by BACs to the claimant's bank account.

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Excess Travel Allowance

This Policy sets out the arrangement for CL employees who are eligible for claiming excess travel expenses; these include:-

- Those whose place of work is changed for operational reasons
- Those whose place of work is changed because of reorganisation
- Those who are redeployed because of ill health, disability or redundancy

The main objective of this Policy is that all CL employees should be reimbursed when their work base is changed for operational reasons including a transfer by CL to a new base. The Board of Trustees recognise the need to balance a number of factors including their wish to support staff, the needs of the MAT, concern for the environment, public perception and prudent use of public funds.

Employees are responsible for their usual home to work mileage or fares – this includes where an employee chooses to apply for a new role within the Trust (ie voluntarily and not instigated by organisational change).

All employees will have a designated work base as outlined in their contract of employment. This will be their normal place of work.

The employee will be paid compensation upon the difference between the cost of travelling a) from their home to the new work base and b) from their home to their original work base ie the home to original work base mileage must be deducted; this is a requirement of HMRC.

Compensation for excess travel may be paid for up to 6 months from the date of transfer to the new work base.

The rate for car users is 45p per mile (being the HMRC approved rate).

When travelling by public transport, directly from or to the employee's home, the rate to be claimed should be as per the ticket price (tickets should be attached to the claim).

For those employees who work part-time, the number of working days should be calculated pro rata.

When the work base has been changed but an employee is only required to travel to that base for a part of the working week, the number of working days per year is calculated pro rata. For any other day not at the new work base, business mileage can be claimed for any distance travelled in excess of the old base to home mileage.

All reimbursements of excess travel claims are subject to tax and National Insurance contributions.

The school to which the claimant has moved to is responsible for the payment of excess travel claims made by the employee.

Compensation payments are not made to those who do not incur travel costs (for example, if they cycle to work) and there is no compensation for additional time spent travelling.

Car parking fines and other motoring penalties are the responsibility of the individual.

The Trust does not provide car insurance for staff using their own vehicles. Staff are personally responsible for ensuring that they have appropriate motor insurance cover and may be asked to provide proof of motor insurance cover and/or an MOT certificate.

Applying this Policy

- Employees whose place of work is changed to another location are entitled to an excess travel allowance for up to 6 months as authorised by the CEO
- Employees whose place of work is changed to another location but apply for a new post at another work base, and are appointed, are not entitled to an excess travel allowance
- An employee who applies for, and is appointed to a new post at a different location, is entitled to an excess travel allowance if the CEO accepts that the employee is under notice of redundancy and their application for the new post is part of their search for alternative employment (this would only apply where the appointment is to a post at the same or a lower band)
- If an employee is transferred to a different work base again, the excess travel allowance would apply from the original work place to the new one. The original period of 6 months would continue.
- If an employee voluntarily moves home whilst receiving an excess travel allowance, the payment should be adjusted downward if the distance is reduced but should remain unchanged if the distance travelled is greater.
- If an employee is promoted whilst at the new location (and within the 6 month period), the excess travel allowance will cease and the new location will become the employee's designated work base.
- If an employee is promoted to a different work base, the entitlement to the excess travel allowance will cease and that location will become the designated work place.

Claiming excess travel allowance

An employee who is eligible for an excess travel allowance should complete and return the relevant form (Appendix 4 Excess Travel Request Form). This should then be returned to the HR Manager who will obtain the approval of the CEO. No excess travel allowance may be paid until the specific approval of the CEO has been obtained.

Once the Request Form has been returned as approved, the claimant must make claims on a monthly basis on the Trust's Mileage Claim Form; each day travelled must be detailed on the form.

The employee shall receive the allowance as part of their monthly salary.

APPENDIX 3 Travel distances between Trust schools (miles)					
	Cherry Tree	Iceni	Templars	Silver End	Powers Hall
Cherry Tree		2.8	16.6	16.3	17
Iceni Academy	2.8		15	14.6	15.8
Templars Academy	16.6	15		3.2	1.3
Silver End Academy	16.3	14.6	3.2		4.6
Powers Hall Academy	17	15.8	1.3	4.6	

These calculations were taken from Google Maps in February 2020 – they represent the **shortest** distance between the Trust schools when driven in a private car.

APPENDIX 4

EXCESS TRAVEL REQUEST FORM

Claimants may be eligible for excess travel allowance following their relocation to a new work base (see Policy for eligibility). The payment will take the form of a claim for excess miles between home to the previous work base and home to the new base by the shortest route (see Appendix 3 of the Policy); this allowance will be paid for no longer than 6 months and is at the discretion of the CEO.

The excess travel allowance is paid at a rate of 45p per mile regardless of the size of the car used. If you require reimbursement for public transport charges, this will be at the ticket rate and must be made in accordance with this Policy.

This agreement applies only where the difference in mileage from home to the new place of work and from home to the old place of work is greater.

A claim must be submitted every month the **School Business Manager** on a Trust Mileage Claim Form (Appendix 1). Receipts will be required if you use public transport.

No excess travel claim can be considered until this form has been certified by either the Chief Operations Officer (COO) or HR Manager and then authorised by the CEO.

PLEASE COMPLETE BELOW IN BLOCK CAPTIALS

NAME	
CL PAYROLL NO	
HOME ADDRESS	
CURRENT WORK BASE	
METHOD OF TRANSPORT	CAR * / PUBLIC TRANSPORT *

* Delete as appropriate – If Public Transport, ticket receipts must be attached to all future claims

HOME TO DESIGNATED WORK BASE: mileage	
HOME TO NEW WORK BASE: mileage	
MILEAGE DIFFERENCE (excess) IN SINGLE JOURNEY	
REFERENCE USED TO MEASURE MILEAGE eg Google	
DATE TO START AT NEW WORK BASE	
DATE EXCESS MILEAGE ENDS (6 months from above)	

I confirm that I possess a current and valid driving licence for the vehicle, adequate insurance to cover occasional business mileage, that the vehicle is in a roadworthy condition and has a valid MOT where required by law. I also confirm that I will ensure I have these in place prior to driving my vehicle in future during work time (please tick box to confirm).

SIGNATURE:	DATE:
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CERTIFICATION BY COO/HR MANAGER

NAME	
SIGNATURE	DATE

AUTHORISATION BY CHIEF EXECUTIVE OFFICER Payment may not be made until this has been signed by the CEO

DATE OF TRANSFER TO NEW WORK BASE	FROM:
	TO:
SIGNATURE	DATE

DATE FORM RETURNED TO CLAIMANT: