



The Athelstan Trust

Travel and Subsistence Policy

| Date of Review | Approved by | Date of Approval | Next Review Date | Website |
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| April 2024, Mar 2025 | Audit, Risk and Finance Committee | 19 th March 2025 | Mar 2028 | Y |

Introduction

If an employee is not sure whether they will be able to make a claim in a particular situation, they should ask before they incur any expenses, as this may not be reimbursed. Clarity should be sought before the claim is submitted.

It is very important that claims are not made outside the terms of this policy and guidance unless permission has been given specifically to deal with a particular situation.

Accommodation

All overnight stays must be approved in advance by the appropriate authorised officer.

In some situations, particularly certain training courses, accommodation is provided as part of the package, in which case employees do not need to make any claim. In other cases, the employee will be reimbursed the actual cost of bed and breakfast incurred.

Travel

General Principles

Employees should only make business journeys when they are absolutely necessary. Other options should always be considered before travel is undertaken which are more efficient and cost effective for example email, telephone, video or telephone conferencing.

Where a business journey is necessary, employees are expected to organise it in the shortest and most effective way.

Employees whose post requires them to undertake business travel are responsible for their own travel arrangements and these must be carried out in the most effective and efficient way to perform the job.

Environmentally friendly travel should be encouraged.

It is the employees' responsibility to ensure that they have the appropriate car insurance. Reference should be made to the Trust Driving Policy.

Mileage Payments

Employees who use their own car, van, motorcycle or cycle for official Trust work purposes are entitled to be reimbursed in accordance with Her Majesty's Customs and Revenue (HMRC) approved mileage rates.

Where a number of employees undertake the same or a similar journey, they should always travel together.

The basic criteria for claiming official mileage is that this will be calculated from the employee's workplace and back again. Normal everyday home to office mileage is the employee's responsibility. Where it is more beneficial for employees to travel direct from home to an outside appointment or vice versa, rather than call in to the workplace first, they are **only** entitled to claim the number of miles over and above their normal home to work mileage. On this basis, all travel claims in any one day should always exclude the employee's normal home to office miles regardless of the reason e.g., training course etc.

The only circumstance in which normal home to office mileage is payable is where a second journey from home to a place of work is made on the same day in order to carry out official duties. Where an employee agrees to work on a day they would not normally work, it is still their responsibility to get to and from work (including training courses). Therefore, no home to office mileage is payable.

Other conditions

Where an employee is required to travel from their normal workplace to carry out their day to day role, travelling time is included within their normal working day. However, employees who are expected to travel to training courses can claim no more hours than their normal working day including travelling time. Where there are excessive demands placed on an employee, for example very long distances travelled which extend significantly over the working day and where such occurrences happen repeatedly over a short period of time, then management will have discretion, as a gesture of goodwill, to allow some time in lieu as recompense.

Rail Travel

If an employee requires a rail ticket for business purposes they must contact the authorised person who can organise this for them.

Employees are expected to travel standard class and take advantage of off peak or other reduced rates if the circumstances allow.

Bus fares and car-parking charges incurred on Academy business may be reclaimed in full.

The Trust will not reimburse in respect of parking and similar fines.

Authorisation

The formal responsibility for authorising business journeys rests with the authorised officer. Employees are advised to seek approval in advance for any unusual journeys where there is likely to be any doubt about the legitimacy of the journey or of the amount of mileage that can be claimed.

Methods of Claiming

Employees should complete the Travel Claim and Expenses Claim, attaching the relevant VAT receipts and submit them to the finance office. Claims must be made on a monthly basis; if an employee delays and then submits forms covering a substantial period they will not be paid if older than 3 months.

Employees should note the terms of the declaration on the claim form. No one should make or approve a claim if the conditions explained in this policy have not been met. The Trust will take a very serious view of fraudulent or negligent claiming or certification.

Insurance

Employees who use their own vehicle for work should ensure they have the appropriate insurance to cover business travel. Please refer to the Trust Driving Policy.

The following rates apply to employees who are required to travel on the Trust business using a car or van:

- First 10,000 miles - 45p per mile
- After 10,000 miles - 25p per mile