The Athelstan Trust

Expenses Policy

(Previously Travel and Subsistence Policy)

Date of Review	Approved by	Date of Approval	Next Review Date	Website
April 2024, Mar 2025, May 26	Audit and Risk Committee	15th June 2026	May 2029	Y

1. Introduction

If an employee is not sure whether they will be able to make a claim in a particular situation, they should ask their line manager before they incur any expenses, as this may not be reimbursed. Seeking clarification in advance helps avoid any misunderstandings and ensures that employees are aware of what can be claimed.

Expenses should only be claimed in accordance with this policy and associated guidance. Where exceptional circumstances arise, approval should be obtained in advance from the appropriate manager.

To support timely processing, all expense claims should be submitted within three months of the expense being incurred. Claims received after this period may not be eligible for reimbursement.

2. Accommodation

All overnight stays must be approved in advance by the Headteacher or CEO (for headteachers).
In some situations, such as certain training courses, accommodation may be included as part of the event package and no claim will be required. Where accommodation is not provided, the employee will be reimbursed for the approved and reasonable cost of bed and breakfast accommodation incurred whilst undertaking Trust business.

3. Travel

General Principles

Employees should consider whether business travel is necessary and, where appropriate, make use of alternative methods of communication such as email, telephone calls or online meetings.

Where travel is required, employees should arrange journeys in the most practical, economical and efficient manner. Approval should be sought in advance for any unusual expenses or where there may be uncertainty about the appropriateness of a journey.

Employees whose roles involve regular business travel are responsible for organising their travel arrangements in a way that supports both operational effectiveness and value for money.
The Trust encourages environmentally sustainable travel wherever practicable.

Employees using their own vehicle for Trust business are responsible for ensuring that they hold the appropriate driving licence, insurance and documentation required for business use. Further guidance can be found in the Trust Driving Policy.

Mileage Payments
Employees who use their own car, van, motorcycle or bicycle for authorised Trust business are entitled to be reimbursed in accordance with (HMRC) approved mileage rates. Where multiple employees undertake the same or a similar journey, car sharing should be considered wherever practical.

Mileage claims are generally calculated from the employee's normal workplace and back again. Travel between home and an employee's normal place of work is considered a personal commuting cost and is not claimable.

Where travelling directly between home and an alternative work location is more practical than travelling via the normal workplace, employees may claim only the additional mileage beyond their usual commute. For this reason, claims should exclude normal home-to-work mileage.

An exception applies where an employee is required to make an additional journey from home later in the same day to carry out approved Trust duties. In such circumstances, mileage may be claimed in accordance with this policy.
Where an employee works on a day that is outside their normal working pattern, including attendance at training, travel between home and the place of work remains a personal responsibility and is not normally claimable.

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

- First 10,000 miles - 55p per mile
- After 10,000 miles - 25p per mile

An additional 5p per mile can be claimed for each passenger in the vehicle who is an employee of the Trust.
Employees should ensure that their insurance policy covers business use. Please refer to the Trust Driving Policy.

Other conditions

Where an employee is required to travel as part of their normal duties, travel time forms part of the working day.

Employees attending training courses may claim working time, including travel time, up to their normal working hours. In exceptional circumstances, where extensive travel places significant additional demands on an employee over a sustained period, managers may consider appropriate arrangements, such as time off in lieu, in recognition of those additional commitments.

Rail Travel

Employees requiring rail travel for Trust business should contact their school finance office to make an appropriate booking in advance.

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

Reasonable bus fares and car-parking charges incurred on Trusty business may be reclaimed.

The Trust will not reimburse any parking and similar fines.

4. Sundry items

Wherever possible,

purchases should be made through the school's normal procurement procedures.

Only exceptional items should be purchased as expenses up to a maximum value of £50 and employees are advised to seek approval in advance for any unusual expenses.

Alcohol cannot be purchased using Trust funds or claimed as an expense.

Claims for Eye Tests should be made in accordance with the Trust Eye Test Policy.

5. Methods of Claiming

All expenses should be claimed via SAM People. Receipts are required for all items other than mileage claims: these must be VAT receipts where appropriate, scanned and attached to the claim in SAM People. The Trust reserves the right not to make payment for an item where a receipt is not included.

Claims should be made on a monthly basis: if claims are made for a longer period, they will not be paid if older than 3 months.

Claims will be reviewed and authorised via SAM People by the appropriate Line Manager.

Employees and managers share responsibility for ensuring that claims comply with this policy. The Trust is committed to maintaining high standards of financial accountability and will investigate any instances of knowingly inaccurate, fraudulent or careless claims.