



INSPIRING EXCELLENCE TOGETHER

The Children First Learning Partnership Staff Travel Expenses Policy (Version 5)

The Staff Travel Expenses Policy in respect of the Children First Learning Partnership has been discussed and adopted by the Directors Board

Chair of Board:

Mrs N. Chell

Responsible Officer:

CEO – Mrs A Rourke

Agreed and ratified by the Directors Board on:

18.03.2024

To be reviewed:

March 2025

Contents

1.0 Introduction.....	3
2.0 Sustainable Travel	3
3.0 Travel and Expenses Policy.....	3
4.0 Definition of Business Travel	4
5.0 Travel Advances.....	5
6.0 Travel Bookings.....	5
7.0 Travel Cost	5
8.0 Use Of Own Vehicle	5
9.0 Car Hire	6
10.0 Accommodation.....	6
11.0 Subsistence	6
12.0 Other Expenses.....	7
13.0 Travel Insurance.....	7

1. Introduction

While it is accepted that travel by employees is an essential element in meeting the Children First Learning Partnership's [CFLP] overall objectives, it is also recognised that the CFLP has a responsibility to ensure that staff travel responsibly and only when required.

The CFLP is required to ensure that all money is disbursed in accordance with our policies and procedures aimed at achieving fairness and good value for money.

CFLP's Travel Policy & Procedures apply to all employees and trustees claiming travel and other related expenses incurred on CFLP's business, excluding normal travel to and from place of work.

2. Sustainable Travel

Sustainable Travel Choices

The following framework should be followed when deciding how to travel for a particular journey. This framework aims to use the following principles:

- Reduce overall business travel through technology
- Reduce money spent on travel (including staff time)
- Increase productivity
- Reduce emissions related to business related travel

Sustainable Travel Framework

1. Can the journey be avoided?

- a) This both increases productivity through increasing work time and reduced emissions
- b) If the journey can be avoided through a telephone conference, telephone call, webcam, SKYPE or similar then this should be the first choice

2. Use of trains and shared cars for domestic journeys

- a) Most journeys undertaken will be relatively short and within the local area. The use of a car will normally be the only practical possibility.
- b) For longer journeys, single occupancy car journeys emit high levels of CO2 per passenger and are not a very good use of time. Consideration should be given to using a train or car sharing.
- c) Train journeys allow staff to read and work while travelling.
- d) Internal domestic flights should be used in exceptional circumstances only, with prior approval from the CEO.

3. Travel and Expenses Policy

- All employees must adhere to the Travel & Expenses Policy when incurring travel and associated expenditure on behalf of the CFLP.
- Employees will be reimbursed the actual travel and associated expenses incurred solely and necessarily in the performance of their duties. Expenditure should be kept to the minimum consistent with the effective performance of work on behalf of the CFLP.
- Employees should neither gain nor lose financially with regard to expenditure and reimbursement on business travel arrangements.
- The mode of travel should be the most cost-effective consistent with the business needs

of the CFLP.

- Employees should travel and be accommodated in safety and reasonable comfort.
- Line managers are responsible for ensuring that all travel on CFLP business is justified and will certify that all claims relating to that travel are in accordance with the Travel Policy & Procedures.
- All expense claims should be authorised by the appropriate line manager. Claims should never be approved by subordinates.
- Wherever possible, and subject to business needs, travel reservations should be made in time to take advantage of cheaper fares or accommodation (e.g. off-peak).
- Claims for reimbursement should be made as soon as possible and in any case within one month after the expenditure has been incurred.
- Procedures for the payment of travel expenses will conform to H M Revenue & Customs requirements.

4. Definition of Business Travel

To determine which journeys may be regarded as business travel the following rules shall apply:

- A business journey is one necessarily undertaken by an employee to carry out his or her duties for the CFLP, or to attend training courses or conferences necessary for the performance of those duties.
- Travel between the permanent workplace and a temporary workplace or travel between home and a temporary workplace or travel between two temporary workplaces are all considered business journeys.
- In contrast, the cost of travelling from home (or any other place the employee attends for personal reasons such as the home of a friend or relative) to a permanent place of work is generally not claimable as this is regarded for tax purposes as “substantially ordinary commuting” and therefore a private journey.
- Expenses incurred during a business journey may be reclaimed from the CFLP within the rules and limits of these Procedures.
- Claims for business journeys that start or end at home should be for the lesser of:
 1. the distance actually travelled, or
 2. the distance that would have been travelled if the journey had started or ended at the employee’s normal place of work.

No Personal Gain

The following rules apply for implementing the policy that employees should neither gain nor lose financially in relation to expenditure and reimbursement on business travel arrangements.

Promotional Incentives

Any purchasing decision shall not be influenced by any promotional incentives such as personal credit card discounts or rebates. Employees should not benefit personally from these incentives. Any personal benefit arising from such incentives is a taxable benefit and would need to be declared by the individual on their tax return.

Partner’s Expenses

Partners shall not travel at the CFLP’s expense except when their presence is required and authorised for a bona fide business purpose. In all cases the CEO must give authorisation in advance. Retrospective authorisation will not be accepted.

A partner may accompany a member of staff for personal reasons. In such instances the CFLP must not be charged for more than if the member of staff had travelled alone. Wherever possible the partner’s travel costs should be invoiced separately and paid privately. If the invoice includes both private and

official travel costs the member of staff should settle the total invoice and reclaim the official element from the CFLP. Private insurance must be taken out to cover the partner's travel.

5. Travel Advances

Travel advances should not normally be required. Where a member of staff is leading a trip, including foreign trips, an advance may be given in local currency.

A completed Expenses Claim Form should be submitted within four weeks of completing the journey to enable the advance to be cleared. If not cleared promptly, the CFLP reserves the right to deduct the outstanding advance from the employee's salary.

6. Travel Bookings

Where possible, staff should plan trips to take advantage of reduced fare opportunities. Particularly, rail travel, wherever possible, should be booked in advance to take advantage of early booking concessions. It is expected that Standard Class travel will be used.

7. Travel Cost

Claims for Actual Expenditure

All claims made for business travel and expenses must be on an Expense Claim Form or a Mileage Claim Form and relate to actual expenditure incurred and must be supported with VAT receipts. Expense claims will be monitored by the Finance department to ensure these remain within acceptable limits. However, the mileage rates for use of a personal vehicle are rates agreeable to the H M Revenue & Customs. Supporting receipts (e.g. for petrol) are required to support mileage claims so that VAT can be reclaimed.

Claims must be supported by VAT receipts and must be authorised as described above.

8. Use Of Own Vehicle

Members of staff who use their own vehicles on CFLP business must have a valid licence and ensure that their motor insurance policy covers them for the relevant business use. It is the responsibility of the individual to ensure that their vehicle is legally roadworthy with the relevant insurance, tax, MOT certificate (when applicable) and is suitable for business use.

Under new legislation smoking is not allowed in a car whilst travelling on business as this is now deemed to be a "place of work" especially when and if carrying other CFLP colleagues or external passengers. Drivers must also be aware of the restriction of mobile phone use when driving.

Reimbursement of mileage will be made at the prevailing rates, detailed below.

The CFLP will not be responsible for any traffic offence violation, speeding fines, parking fines or other costs incurred whilst on CFLP business.

Mileage Rates (2023/24)

Cars and vans:

on the first 10,000 miles in the tax year on	45p per mile
each additional mile above this	25p per mile

Motorcycles:

For any distance travelled in the tax year	24p per mile
--	--------------

9. Car Hire

Car hire should be considered for long road journeys as it will be more cost effective to use a hired vehicle rather than a private one. The Finance Office should be contacted at least two weeks in advance of the travel date so that arrangements can be made.

Where a car hire is used, fuel will be reimbursed based on actual spend, the receipt must be provided in all cases and only sufficient fuel for the journey purchased.

Under new legislation smoking is not allowed in a hire car whilst travelling on business as this is now deemed to be a “place of work”

Drivers must also be aware of the restriction of mobile phone use when driving. The CFLP will not be responsible for any traffic offence violation, speeding fines, parking fines or other costs incurred whilst on CFLP business.

10. Accommodation

When employees are necessarily away from home on CFLP business they are entitled to hotel or other suitable accommodation. Basic standards include cleanliness, privacy, personal security and the availability of breakfast.

The Finance Office should be contacted at least two weeks in advance of the travel date so that arrangements can be made.

Meals

In the event of an overnight stay, the accommodation will normally be booked on a bed and breakfast basis. Where breakfast is not available at the hotel, a maximum of £10 can be claimed. A maximum of £25 may be claimed for an evening meal. Alcohol will not be reimbursed in any circumstances. A VAT receipt is required for all expenses claimed.

11. Subsistence

Where an employee is travelling and is absent from their normal place of work or home and is not staying away overnight, then providing the following conditions are met, a meal allowance may be claimed.

Qualifying Conditions

The qualifying conditions are:

- the travel must be in the performance of an employee’s duties or to a temporary place of work, on a journey that is not substantially ordinary commuting.
- the employee should be absent from their normal place of work or home for a continuous period in excess of five hours.
- the employee should have incurred a cost on a meal (food and drink) after starting the journey and retained appropriate evidence of their expenditure in the form of a VAT receipt.

Rates

Minimum Journey Time	Maximum Amount of Meal Allowance
5 Hours ceiling (1 meal)	£5
10 Hours ceiling (2 meals)	£10
12 Hours ceiling (3 meals)	£15

Note that an employee may only claim one of the above rates per journey, they are not cumulative.

12. Other Expenses

Car Parking

The CFLP will reimburse all expenses for car parking costs incurred whilst travelling on CFLP business away from the employee's normal place of work. Claims must be made on the Expense Claim form and supported by receipts. Where a parking meter was used and no receipt is available a note to that effect must be included in the claim.

Claims for parking excess charges, fines, wheel clamping unlocking etc. will not be met by the CFLP under any circumstances.

Taxis

Taxis should only be used in cases of urgency or where no public transport is reasonably available or to ensure the safety and welfare of employees travelling only. Consideration must first be given to other more economical means of travel i.e. local bus and train services.

When an employee needs to use a taxi, all expenses must be claimed using the expense claim form and supported by receipts.

Public Transport Expenses

Local bus, train and underground fares for business journeys (not home-to-school/office) may be claimed supported by receipts.

13. Travel Insurance

Employees are adequately insured through the CFLP insurance policy when travelling on CFLP business but the policy does not cover personal effects.

Additional insurance should not be required for school trips as this is covered by the CFLP insurance policy.

Additional insurance will be required for overseas trips. The trip leader should contact the CEO to discuss insurance cover before booking the trip.

Version Control:

Version	Date	Amendment	By
V2	06.01.2021	Name of chair changed to Mrs N. Chell (Front cover)	CEO
V2	06.01.2021	Date of review and ratification changed to 10.02.2021 (Front cover)	CEO
V3	17.01.2022	Date of review and ratification changed to 16.02.2022 (Front cover)	CEO
V4	18.01.2023	Date of review and ratification changed to 15.02.2023 (Front cover) Meal allowance ceiling rate amended from 15 hours to 12	CEO
V5	24.01.2024	Date of review and ratification changed to 18.03.2024 (Front cover)	CFO