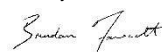




Travel and Expenses Policy

Responsible for policy:
Chair of Directors

CC1 Finance, Resources and Premises



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Definitions

In this **Travelling and Expenses Policy**, unless the context otherwise requires, the following expressions shall have the following meanings:

- i **'The Romero Catholic Academy'** means the Company named at the beginning of this **Travelling and Expenses Policy** and includes all sites upon which the Company is undertaking, from time to time, being carried out. The Romero Catholic Academy includes; **Corpus Christi, Good Shepherd, Sacred Heart, SS Peter and Paul, St Gregory, St John Fisher, St Patrick, Cardinal Wiseman and the Shared Services Team.**
- ii **'Romero Catholic Academy'** means the Company responsible for the management of the Academy and, for all purposes, means the employer of staff at the Company.
- iii **"Staff" or "employee"** for the purpose of this policy includes Board Directors, Committee members and Local Governing Body members.
- iv **'Board'** means the Board of Directors of the Romero Catholic Academy.
- v **"Clerk"** means the Clerk to the Board, Core Committees and to the Local Governing Bodies of the Academy appointed from time to time, as appropriate.
- vi **'Chair'** means the Chair of the Board of the Directors, Core Committees or the Local Governing Body appointed from time to time.
- vii **'Chief Executive Officer'** means the person responsible for performance of all Academies and Staff within the Multi Academy Company and is accountable to the Board of Directors.
- viii **'Diocesan Schools Commission'** means the education service provided by the diocese, which may also be known, or referred to, as the Birmingham Diocesan Education Service.
- ix **'Local Governing Body'** means the governing body of the School.
- x **'Academy Committee Representatives'** means the governors appointed and elected to the Local Governing Body of the School, from time to time.
- xi **'Principal'** means the substantive Principal, who is the person with overall responsibility for the day to day management of the school and included the Executive Principal where appropriate
- xii **'School'** means the school within The Romero Catholic Academy and includes all sites upon which the school undertaking is, from time to time, being carried out.
- xiii **'Shared Services Team'** means the staff who work in the central team across the Company
- xiv **'Vice-Chair'** means the Vice-Chair of the Board of the Directors, Core Committees or the Local Governing Body appointed from time to time.

1. Introduction

This guide provides details of the approval process for travelling and the types of business travel and expenses that may be reimbursed when travelling on business on behalf of The Romero Catholic Academy. The purpose of this policy is to ensure that staff are reimbursed for all necessary expenditure reasonably incurred in the performance of their duties. The basis of the expense claim will be actual expenditure up to limits as specified in this policy (limits may be reviewed from time to time).

Details of expenses to be claimed must be submitted on the appropriate form with accompanying original VAT receipts attached where applicable. The form should be signed by the claimant and their Line Manager (or chair of Board of Directors, Committee or LGB). In the event of expenses submitted by the Chair of the Board of Directors the CEO will have responsibility for approval. The Expense Claim Form can be found [here](#)

If no receipt is available and a receipt is required, then the expenditure can be reclaimed only with approval from the Chief Financial Officer.

A VAT receipt must contain the name and address of the supplier, their VAT registration number, date of purchase, details of goods or services purchased and the VAT inclusive amount of the purchase.

Expense claims should be submitted in a timely manner, preferably within one month of expenditure being incurred and in all cases before the end of the academic year to which they relate. Late claims received (those received after 31st Aug relating to pre 31st Aug) may not be processed.

Subject to compliance with the above, claimants will be reimbursed by Finance (not via payroll) in the payment run following the approval/processing of the expense claim.

The Romero Catholic Academy respects claimants' personal integrity, and expects that claims will be completed honestly, accurately and promptly.

2. Travel

Claims for travel should be on the basis of standard fares for public transport unless first class travel has been specifically authorised in advance (evidenced by line manager or above email) or is actually cheaper than a standard class ticket on a like-for-like basis. Should first class travel be purchased without prior approval and is more expensive, the standard fare only will be reimbursed.

Wherever practical video/telephone conferencing facilities should be used as an alternative to travel.

Where possible, public transport travel should be booked in advance (seven or more days) to take advantage of lower fares.

3. Mileage

Where an employee is required to use their personal car for business purposes it is their responsibility to ensure the car is well maintained with the appropriate license, MOT and business use insurance cover etc.

Business mileage may be claimed where public transport is not possible, practical or cost effective. Employees may claim a business mileage allowance for journeys they are required to undertake to attend a location other than their normal place of work. This includes travel to and from other Romero Sites not deemed the employee's normal place of work.

Claims for mileage must state the date of travel, the starting point, the destination point and the return point. Claims should also detail the purpose of the travel. Claims for mileage will be checked against online route planners. Individual journeys should be itemised and mileage should not be claimed in bulk.

Travel from home to the employee's normal place of work is not business travel. If an employee travels directly from their home to a place other than their normal place of work for business purposes, (or the converse at the end of the day) the mileage to claim cannot exceed the mileage travelled less the normal commuting mileage.

Claims up to 10,000 business miles in any one tax year will be paid at the latest HMRC rate. Claims in excess of this will be paid at the lesser HMRC rate. (See Appendix 1).

Employees should be advised that there are tax implications where Romero provides transport (or covers the cost of transport) from home to work.

An additional payment of £0.05 per mile can be claimed for each additional passenger (Romero staff member) travelling in the claimant's car on business journeys. This does not include Romero pupils or non-Romero adults.

4. Accommodation and Subsistence

Employees will be reimbursed for overnight accommodation where that is required and pre-approved by the line manager.

The costs reimbursable include hotel cost, evening meal, breakfast, Wi-Fi (where required for business purposes) and reasonable telephone costs (e.g. brief personal call home where no company telephone is provided). Costs not reimbursable include, but are not limited to in-room entertainment, alcohol or other mini-bar purchases, laundry and newspapers.

Employees may claim a flat rate allowance where it is necessary to stay overnight away from home and they choose to stay with family or friends rather than in a hotel. No receipt is required in this instance.

Where one employee pays on behalf of another employee the details of that employee and the costs must be entered on the claim form. In such cases the most senior employee should make the claim and the normal approval process applies.

Where an employee is required to travel on business other than their normal place of work and leaves home earlier than 6am (and that is earlier than their normal daily leave time) then up to £10 will be reimbursable (upon production of appropriate VAT receipt) for breakfast/refreshments purchased after the qualifying journey has commenced.

Where an employee is required to travel on business other than their normal place of work and work finishes later than usual (after 8pm) having worked their normal day then up to £20 will be reimbursable (upon production of appropriate VAT receipt) for a meal/refreshments purchased before the qualifying journey ends.

The above breakfast/evening rates are for use in exceptional circumstances only and are not intended for staff with regular early or late work patterns.

£10 may be claimed where an employee has been undertaking qualifying travel for a period of at least 5 hours and has incurred the cost of a meal/refreshments. That rate is £20 where the period is at least 10 hours.

Lunch (up to the value of £10) may be claimed where an employee is required to attend an all-day meeting / training etc. away from their normal place of work and where lunch is not provided.

5. Parking

Authorised parking charges and tolls incurred when not travelling to an employee's normal place of work will be reimbursed upon the production of a valid VAT receipt attached to the expense claim form.

Parking or speeding fines incurred whilst on business travel will not be reimbursed .

6. Business Meetings

Tea, coffee and refreshments should only be provided where the meeting needs to be for 2 hours or longer or when meeting with an external organisation. Food e.g. sandwiches, pastries, fruit etc. should only be provided where it is necessary to hold a meeting during a normal meal time (breakfast - before 8.30am, lunchtime – noon to 2pm or evening – after 5.30pm) and it is not practical to expect staff to supply their own food.

7. Entertaining Business Contacts

It may be necessary from time to time to provide hospitality to business contacts from external organisations. The level of expenditure should not exceed £50 per head (including service).

Claims in excess of this require prior approval from the CEO and will only be granted in exceptional circumstances.

The cost should be met by the most senior employee in attendance and reclaimed via the normal submission of expenses.

8. Links to other documents

This Travelling and Expenses Policy is linked to our [Expense Claim Form](#)

9. Monitoring and Review

This policy will be reviewed biannually by CC1 Finance, Audit, Resources and Premises.

Appendix 1 – Rates

(All rates exclude VAT where applicable)

Public Transport	Standard Fares
Overnight Accommodation	Maximum £150
Overnight Subsistence	Maximum £30
Subsistence (while travelling)	Maximum claim: <ul style="list-style-type: none"> • Breakfast £10 • Travel over 5 hours £10 • Travel over 10 hours £20 • Evening Meal £20
Staying with Family/Friends Allowance	£35 per overnight stay
Business Mileage	HMRC guidance rates: <ul style="list-style-type: none"> • £0.45 per mile up to 10,000 miles in a tax year; • £0.25 per mile above 10,000 in a tax year
Passenger Allowance	£0.05 per claimable mile
Entertaining	Maximum £50/head (including service)