

Expenses Policy

This policy is effective in all Academies within the Learning without Limits Academy Trust and the Trust Central Team. Where the term 'Trust' is used in this policy, it covers all Academies and the Trust Offices.

Associated Policies:	
Anti-Fraud Policy	Gifts and Hospitality Policy
Charging and Remissions Policy	No Purchase Order, No Pay Policy
Credit Card Policy	Procurement Policy
Discretionary Spend Policy	Reserves Policy
Donations Policy	Staff Behaviour Policy (Code of Conduct)

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- 4.1.1. Within the Trust Academies, the Principal is responsible for the implementation and monitoring of this policy, to ensure that it is communicated to employees and that it is applied consistently.
- 4.1.2. Within the Trust Central Team, the Chief Financial Officer is responsible for the implementation and monitoring of this policy, to ensure that it is communicated to employees and that it is applied consistently.

5. Legislation and statutory guidance

5.1. The Trust is obliged to comply with:

- [Academy Trust Handbook](#)
- Funding agreements with the Department for Education (DfE)

6. Timeliness of submission

6.1. Expenses should be submitted as soon as possible after they have been incurred. (e) T-3.1 (

10. Travel (including air, rail and ferry)

10.1. Alternatives to travelling and mode of travel

10.1.1. Wherever practicable, audio conference facilities and video conference facilities should be considered as an alternative to travelling. For travel within mainland UK and to/from Eurostar destinations rail is the default mode of travel over air.

10.2. Rail travel

10.2.1. First class rail travel is only permitted where the authorising line manager and Chair of the Trust Board considers that the need for a working environment, use of portable computer equipment for example, is justified given the length of journey, nature of journey and cost of journey. The only exceptions are where it can be demonstrated that it is the cheapest ticketing option of all available tickets.

10.2.2. Significant savings can be obtained by specifying outward and/or return journeys at time of booking. Staff should liaise with the Trust Finance Department to secure best value.

10.3. Air travel

10.3.1. Learning without Limits Academy Trust travellers should use the lowest cost means of travel and fare. Travel should be booked via the relevant Finance Officer. Significant savings can be obtained by specifying outward and/or return journeys at time of booking. Some airlines will also allow changes to fixed tickets for an additional charge and this may be cheaper than buying a flexible ticket. Fully flexible tickets should only be requested when absolutely necessary.

10.3.2. Personal travel linked to Learning without Limits Academy Trust business.

10.3.3. Personal travel as part of a business trip is discouraged, and in any event only allowed where such travel actually reduces the cost of business travel as part of Learning without Limits Academy Trust work e.g. staying a Saturday night to take advantage of a lower cost fare. Where additional costs are incurred that are not necessary, e.g. Saturday night in a hotel, the individual employee must meet these. Adequate private travel insurance must be held. Weekend accommodation will be paid where the traveller is unable to return home as part of a longer business trip.

10.4. Travel with a spouse or partner

10.4.1. If a spouse or partner who is not involved in Learning without Limits Academy Trust business accompanies a member of staff, trustee or member the traveller must bear the cost of their spouse/partner. It is not permitted to downgrade the travel or accommodation booked in order to fund travel costs for a companion.

10.5. Frequent traveller schemes and personal incentives

10.5.1. Membership of a frequent traveller scheme must not deflect from using the most cost-effective option presented. Learning without Limits Academy Trust will not reimburse frequent traveller membership fees.

11. Transport

11.1. Buses and public transport

11.1.1. When travelling, public transport should normally be used.

11.2. Minicabs and taxis

11.2.1. Minicabs or taxis can be taken for business purposes if it is the most cost effective means of transport. A final destination must be specified for all bookings. Travel by minicab or taxi is not ordinarily appropriate for journeys over 40 miles; the cost of the element over 40 miles will be deducted from salary and can be reclaimed via expenses if there is a genuine business reason. Black taxis are more expensive than minicabs and they should only be booked as a last resort. Where taxis are hailed the cost can be recovered through an expenses claim. Evidence of Uber/App bookings should be submitted with the claim and must not be excessive for the journey undertaken.

11.3. Journeys between home and normal place of work

11.3.1. You are expected to meet the full cost of all journeys between your home and your normal place of work.

11.4. Journeys between home and temporary place of work

11.4.1. If you can demonstrate that your journey from home to a temporary base (or vice versa) incurs excess travel costs, the excess costs will be reimbursed. Full details of the excess costs must be provided on your expense claim.

11.4.2. Trustees and members may claim transport costs for attending meetings related to Trust business.

12. Driving (including mileage rates and hire cars)

12.1. Mileage

12.1.1. When driving on Learning without Limits Academy Trust business, provided it is further from your home to your temporary destination than it is from your home to your normal place of work, you can claim the lower of the distance:

- from your home to your temporary destination; or
- from your normal place of work to the temporary destination.

12.2. Driver's responsibility

12.2.1. It is your responsibility to ensure that you comply with your Motor Vehicle Insurance Policy before driving a private vehicle on Learning without Limits

13.

Meal

- 15.4. Home to work base mileage, in the event of a dispute, will be based on Google Maps.
- 15.5. Trustees and members will be deemed to be travelling from home on their daily work place, to attend meetings, whatever is the most appropriate given the timing of meetings.

16. Contractors

- 16.1. Entitlement to claim expenses, for contractors and subcontractors, will normally be set out in the contractual relationship. Where an entitlement exists but no specific levels have been set out in a formal contract, then the rates and principles set out in this policy for employees will also apply to contractors.
- 16.2. When invoicing for reimbursement of expenses, contractors must also include copies of receipts and timesheets to support the invoice.

17. Roles and responsibilities

- 17.1. All staff, governors, trustees and members are expected to be fully aware of the contents of this policy and their individual responsibilities associated with it. Line managers, senior managers, chairs of governors and chairs of the trustees and members are responsible for checking thoroughly any expenses claims submitted to them before signing them off.

18. Impact on work/life balance

- 18.1. There will be minimal impact on work/life balance of staff, governors, trustees and members submitting expenses requests.

19. LwLAT Wellbeing Statement

- 19.1. The Trust will always put the effective education of our learners at the heart of any decision that we make. In doing so, we recognise that the requirement to adhere to policies and procedures may be time consuming and can impact on workload. For this reason the Trust and its Academies will always endeavour to support staff when policies and procedures are being actioned.

20. Review of this Policy

- 20.1. The LwLAT Trust Board has overall responsibility for the adoption, review and amendments of this policy. The Trust Board will review this policy yearly, or earlier if necessary, to comply with statutory DfE updates and amendments. Annual financial audit also ensures probity.