Travel and Expenses Policy

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4. Making Business Travel Arrangements

4.1 Each academy has different structures in place for organising and booking travel which should be used, e.g. some academies have administrators booking all travel, whilst others allow staff to book their own travel.

4.2 It is mandatory that travellers must notify CIT of all overseas travel by completing the Travel Log prior to their travel date.

4.3 Travellers must also comply with any local rules issued by their own academy regarding pre-trip approval. The departmental budget holder may reserve the right to refuse reimbursement of travel and subsistence claims if travellers have not sought and received the budget holder's permission to incur those expenses.

4.4 Where possible, individuals (as identified in section 3.1 above) should consider whether it is NECESSARY to travel, or whether alternatives can be utilised for meetings and therefore reduce travel and expenses claims, e.g. Microsoft Teams/Zoom meetings, etc.

5. Travel Insurance and Risk Management

5.1 The number of business trips undertaken by CIT employees and students is increasing. Travelling overseas, in particular, can present increased risks to travellers' health, safety and security due to the unfamiliar environment – risks may include exposure to hostile political situations, disease, travel accidents, opportunistic crime, etc.

5.2 CIT has a duty of care to its travellers under the Health and Safety at Work Act and must ensure that it has appropriate processes in place to manage any reasonably foreseeable risks.
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8.2.4 First Class flights are not allowed under any circumstances.

8.2.5 Anyone making claims must have a full VAT receipt.

8.3 Flight upgrades at CIT's expense are not permitted and claims will not be reimbursed. Should travellers upgrade then any and all additional costs will be at the traveller's expense.

8.4 Baggage charges. The correct number should be added during the flight booking process. If you are required to transport CIT equipment, then checks should be made

to the business trip using a reputable supplier. If car hire has to be organised whilst overseas, then the traveller should pay for this locally using a CIT charge card (if held). Otherwise a claim for actual expense must be submitted including all receipts.

9.8 Parking charges, tolls and Congestion Zone charges must be claimed using the relevant claim form and be accompanied by a valid VAT receipt where possible or by proof of purchase if a receipt is not available.

9.9 Fines for parking, tolls and Congestion Zone charges etc. will not be reimbursed under any circumstance.

9.10 When travelling, please use public transport wherever possible. Petty cash may be used to pay for taxis up to a value of £20 for a round trip or £10 each way where different firms are used, but a valid VAT receipt must be submitted on completion of travel or the petty cash used will have to be refunded by the traveller.

9.11 Taxis must not be used where the trip distance exceeds 10 miles unless it can be demonstrated that it is the best value option or exceptional circumstances apply, e.g. staff working usually late (after midnight) or travelling back late from a CIT business trip. These may be reimbursed at the discretion of the CFO.

9.12 Claims for chauffeur driven cars will not be reimbursed under any circumstance.

9.13 For large groups of business travellers it may be a cost effective alternative to hire a coach. A business case must be submitted and approved in advance of travel by both the CEO and CFO and all receipts must be submitted with the claim.

10. Accommodation

10.1 All accommodation (hotels, B&Bs, guesthouses) should be booked in advance and should represent the best value for money that can be met while meeting the basic requirements of a safe and comfortable stay.

10.2 The maximum overnight costs per traveller is:

10.2.1 Central London - £150.00 per night including breakfast.

10.2.2 Rest of UK - £100.00 per night including breakfast.

10.3 In exceptional circumstances more expensive accommodation may be permitted, provided it is approved in advance by both the CEO and CFO.

10.4 If the traveller is staying room only, they may claim the cost of breakfast provided the room and meal do not exceed the limits set above.

10.5 It is expected that most hotels would provide Wi-Fi free of charge. However, should there be a charge for the use of Wi-Fi this will be reimbursed where it is used for CIT business purposes. Please pay using a CIT charge card (if held) or submit a claim for actual expense incurred which must include a valid receipt.

10.6 Overseas accommodation should be booked in advance of travel to ensure the most cost effective deal available.

10.7 Gyms, spas, minibars, cable TV, Sky TV, pay per view movies, pay per view sports and room upgrades will not be reimbursed.

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academy that the expense was associated to. If the expense is for multiple sites then one claim can be made directly to the Central Finance team who will apportion the claim appropriately.

14.2 Please complete your expense claim form clearly and correctly. Incomplete or unclear expense claim forms will be returned for re-submission.

14.3 All claims must be signed by the claimant. Unsigned forms or forms signed by someone other than the claimant will be returned for re-submission.

14.4 The form with receipts firmly attached (or attached in a separate sealed envelope if there are multiple receipts) should be submitted for approval by your line manager who certifies the expense forms.

14.5 Head Teachers' and the Executive Head Teachers' claim forms will be approved by the School Operations Manager in line with the budget for the site in question.

14.6 Staff must submit expense claims within 6 weeks of the expense being incurred. Any claims submitted after this deadline may not be reimbursed and have to be additionally authorised by both the CEO and CFO.

14.7 Expense forms cannot be self-authorised. Expense claims should be authorised by a more senior person (with the exception of the Head Teacher/Executive Head Teacher whose claim can be approved by the School Operations Manager for the appropriate school). This is usually the school's Head or the line manager for persons employed in the Central Support Hub. All claims for the CEO should be authorised by the Chair of the Trust Board. The authorisation confirms:

14.7.1 Any journey taken was authorised,

14.7.2 Expenses were properly and necessarily incurred on CIT business.

14.8 When an employee incurs costs in a foreign currency, not GBP, then they should record the currency amount and the sterling amount. The employee should use the actual exchange rate obtained (supported by bank/credit card statement or Bureau de Change receipt) to convert the currency to GBP.

14.9 All items included on an expense claim form must be supported by a valid VAT receipt. A valid VAT receipt should, wherever possible, include:

14.9.1 Vendor address and/or name,

14.9.2 Breakdown of items (+ VAT breakdown if applicable),

14.9.3 Date of transaction,

14.9.4 VAT registration number (if applicable),

14.9.5 Total amount due.

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14.11 In circumstances where a printed receipt is not available, handwritten receipts produced

20.4 Travel from home to other schools may be allowable, provided it is further than the distance to the office.

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