Member, Trustee and Governor

Travel and Subsistence Policy

Responsible Committee	CLPT Finance & Operations Committee
Date Approved by Committee	Summer 2026
Implementation Date	Summer 2026
Next Review Date	Summer 2027
Policy Owner	Kate Hillman, CFO

This document has been created to support the mission, values and beliefs of the Creative Learning Partnership Trust:

Our mission.

Creating **transformational** educative opportunities; promoting **social justice**; unlocking individual **freedom**

Our values.

Integrity

Courage to do the right thing, taking time to care.

Speaking and acting truthfully, fairly and upholding universal, moral principles.

Collaboration.

Working together, enabling each other.

Working with others to achieve strategic direction and to develop mutual trust and respect.

Dedication.

Committed to supporting and improving.

Showing commitment to and responsibility for strategies and goals.

Kindness.

Thinking of others and acting with compassion.

Demonstrating intentional actions to show care, respect and empathy to others.

Innovation.

Using expertise and research to transform.

Taking a proactive approach to problem solving , showing creativity, forward thinking and adaptability.

Understanding.

Openness, listening and valuing one another.

Actively listening to others to gauge the perspectives and needs of others within relevant context.

C L P T

CREATIVE.

Creativity is at the heart of how we achieve exceptional educational outcomes. It drives innovation and empowers us to transform new and original ideas into reality, enriching the learning experience for every child.

LEARNING.

Learning is at the core of all we do. We are relentless in our commitment to ensuring that every child within our care achieves outcomes that truly reflect their potential and aspirations.

PARTNERSHIP.

Collaboration and **partnership** are key to continuous improvement. By working together, we create an inclusive, supportive, and responsive organisation that listens and learns from all voices.

TRUST.

Trust is the foundation of our culture. It permeates every aspect of our schools and organisation, creating confidence, integrity, and building strong relationships across our entire community.

1 Introduction

1.1 This document sets out the policy for Members, Trustees and Governors travel and subsistence and outlines what the procedures and rules are for making a reimbursement claim.

2 Policy

2.1 Claims should normally be submitted to the Chief Financial Officer (CFO) for Members and Trustees or the relevant school bursar for Governors, after each meeting, on the claim form provided. These will be approved by the chair (or, in exceptional circumstances, by the Chief Executive Officer – CEO or Headteacher).

2.2 Contact and bank details must be submitted to the CFO/ school bursar on the form shown in Appendix 1 (available from the CFO/ school bursars). From time to time, you may be asked to confirm these details for audit purposes. You may also resubmit the form as and when your details change. The form should not be altered and you must sign and date it. Any request to amend bank details must be independently verified by telephone in line with DfE cyber-security expectations

2.3 The claim form is provided at Appendix 2 and a copy can be obtained from the CFO/ school bursars. All receipts and invoices must be attached to your claim. Invalid amounts will be deducted from the claim before reimbursement. Claims may be selected for review as part of the Trust's internal scrutiny programme

2.4 The CEO/ Headteacher will ensure your claim is reviewed by and, where appropriate, authorised by the Chair. Where this process would cause excessive delays, uncontroversial claims may be authorised by the CEO or Headteacher.

2.5 Claims will usually be paid within 2 weeks once authorised.

2.6 All travel and subsistence expenditure must represent value for money and use the most economical option available

2.7 Submission of false or misleading claims will be treated as financial irregularity under the Trust's Fraud Policy

3 Rail Travel

3.1 It is CLPT policy that long distance travel is best undertaken by train. Once authorised by the CEO/ Headteacher this will be booked by the CFO (Members, Trustees) or school bursar (Governors). Charges will then be incurred directly by the school.

3.2 The travel will be based on the most efficient and economic route.

4 Travel by Private Car

4.1 For travel by private car, mileage should be claimed from your normal place of work, or your home, to the meeting.

4.2 Where a personal car is used, the vehicle must be legally roadworthy and you must:
hold a valid driving licence
be insured for business mileage
abide by traffic laws.

4.3 The current rates that can be claimed are:
Up to 10,000 (in a tax year) on CLPT business – 55p per mile
Over 10,000 (in a tax year) on CLPT business – 25p per mile

4.4 These rates are in line with the HM Revenue and Customs Approved Mileage Allowance Payments and therefore, should not attract any tax liability.

5 Travel by Taxi

5.1 Taxis should only be used where no practical alternative exists. Receipts are required for reimbursement.

5.2 Claims for taxi fares must be accompanied by a receipt and the amount of the actual taxi fare paid will be reimbursed.

6 Air Travel

6.1 Prior approval of the Chair and CEO/ Headteacher is required for air travel. Once this has been received the CFO (Members/ Trustees) or school bursar (Governors) are able to book the travel. Charges will then be incurred directly by the Trust/school.

7 Overnight Stay

7.1 All reasonable attempts should be made to avoid an overnight stay. Where it is unavoidable, please obtain prior authorisation from the Chair and CEO/ Headteacher and the booking will then be made by the CFO (Members/ Trustees) or school bursar (Governors). Charges will then be incurred directly by the Trust/school.

7.2 Overnight subsistence (per night): Actual expenditure incurred will be reimbursed on the production of receipts up to the following limits:

- Breakfast (if not included in accommodation) £10.00 maximum
- Evening meal £25.00 maximum

The purchase of alcoholic beverages will <u>not</u> be reimbursed

7.3 Whilst staying overnight CLPT will not reimburse any other personal incidental expenses except those already mentioned.

CLPT MEMBER, TRUSTEE & GOVERNOR BANK DETAILS

Name: ....

Address: ....

....

Contact telephone number: ....

Email Address: ....
(*This will be used for expenses remittance advices*)

Bank Name: ....

Bank Account Name: ....

Bank Account Number: ....

Bank Sort Code: ....

Signature: ....

Date: ....

Appendix 2

MEMBERS, TRUSTEES & GOVERNORS TRAVEL & EXPENSES CLAIM FORM

Ref: (office use)	
Surname:	
Forename:	

Vehicle:	Car / Motorcycle **
Vehicle C.C:	
Vehicle Reg:	

Tick if first claim ☐

Tick if change in any vehicle details ☐

MILEAGE DETAILS						MILEAGE TOTALS		
Date (dd/mm/yy)	From (Location)	Time (hh:mm)	To (Location)	Time (hh:mm)	Nature of Business	Taxable	Non Taxable	Non Payable
					Total this claim			
					Total b/f			
					Total c/f			

** Please delete as appropriate

PTO for expenses and authorisation

EXPENSES					
Date	Details of Expenses	Nature of Business	Taxable (£)	Non Taxable (£)	Non Payable (£)

Please complete all relevant sections on the claim form.

Claimants must keep a cumulative record of their mileage claimed in each tax year. This is necessary because once 10,000 business miles has been reached the rate applicable to future claims is reduced. To aid in this, claimants are required to completed the mileage total b/f and c/f sections on the form.

This claim must be supported by receipts in line with CLPT's Member, Trustee & Governor Expenses Policy. Where amounts cannot be verified the claim may be rejected.

NOTE TO CLAIMANT: by signing this form you are certifying that no previous application for the above stated expenses has been made and that the amount(s) claimed have been properly incurred in carrying out your official duties.

CLAIMANT
Signature:
Date:

AUTHORISER
Signature:
Date:

ENTERED ONTO PSF
Signature:
Date: