

Travel & Expenses Policy

Introduction

The purpose of this document is to enable employees and volunteers to understand and be able to reclaim costs incurred when working on behalf of Spinnaker.

As a ministry, we seek to be good stewards of the finances entrusted to us by God to fulfil our mission. Therefore, it is the responsibility of every staff member and volunteer to be sensible when purchasing items or incurring expenses during the course of their work.

Which expenses may I reclaim?

Travel

Wherever possible, the most cost-effective method of travelling should be used for all work-related journeys. Staff and volunteers should research the options available for any journey such as public transport or use of their own car. The cost of parking should also be taken into account. It is recognised that the most cost-effective method of travel is not necessarily the most efficient, for example when needing to transport equipment or resources, and it may not be the safest, for example when travelling late at night or in remote areas. Therefore, efficiency and safety should be considered when arranging transport as well as cost.

Where a private vehicle is being used for work purposes, a mileage allowance, currently 45p per mile, can be claimed. It is the responsibility of staff to ensure that their insurance covers their business travel in their private vehicle.

Generally, travel costs to commute to/from home to a regular place of employment may not be claimed. For schoolworkers, their place of employment would be the regular schools they visit; for any other meetings or visits, they will be reimbursed.

Mileage allowance can be claimed for any travel beyond your place of work.

Taxis should only be used when they are the most effective form of transport, for example there is no other form of transport available, or circumstances such as travelling late at night mean that a taxi is the safest form of travel.

Spinnaker does not reimburse business bicycle miles, however HMRC will grant you 20p per mile as an allowance when calculating your Income Tax.

Meals and Drinks

Claims for entertaining or offering hospitality will be reimbursed when this is for Spinnaker business. The reason for the entertainment, the nature of the entertainment and the persons entertained need to be entered on the expense form.

When away from the usual place of work or travelling across mealtimes, the first meal time cannot be claimed for (unless the team member has stayed away from home the previous night for Spinnaker purposes). Subsequent meals can be claimed for, up to a maximum of £5 for breakfast, £8 for lunch and £10 for dinner. Drinks at a meal can be claimed as part of the meal allowance (except alcoholic drinks).

Claims for alcoholic drinks will not usually be reimbursed. In very exceptional circumstances alcohol may be purchased, but this must be approved by the CEO in advance.

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Miscellaneous Expenditure

It is recognised that from time to time it will be necessary to purchase miscellaneous items not covered in the above guidelines. These items require prior approval of your line manager and for significant purchases, from the trustees.

Where resources are purchased for work purposes, such items will become the property of Spinnaker Trust and should be made available for wider use.

Notes

- Wherever possible staff should accompany the school on vehicles provided by them.
- Spinnaker will not reimburse staff where they incur parking or speeding fines.

Spinnaker Trust has an exemption with the HMRC on certain expenses. This means that we can reimburse these expenses to you free of tax and they do not need to be declared in your self-assessment tax return. All of the allowable expenses contained in this policy are covered by the exemption.

How may I make a claim and what records must I keep?

Claims can be made at any time, but from a practical point of view it is recommended that you submit a claim for a calendar month as soon as possible after the end of that month.

Expense claim forms should be submitted via email attaching copies of supporting receipts. Spinnaker workers are to keep original receipts to double check once reimbursed via direct bank payment. A remittance will be emailed confirming when payment has been sent.

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