



SEDBERGH SCHOOL

BUSINESS TRAVEL & EXPENSE REIMBURSEMENT POLICY

1) Policy Statement

This policy applies to all employees of Sedbergh School, SSDL and SSIL (collectively referred to as the School) when travelling on School business.

This policy provides guidance and limits for employees claiming for all travel and entertainment expenses incurred in the performance of their duties for the School.

It is mandated that the following travel arrangements are booked through Travel Counsellors:

- **UK and overseas marketing travel bookings**
- **Overseas travel to support subsidiary undertakings**
- **Rail and hotel bookings for UK school trips, where appropriate**
- **Overseas school trips, where appropriate**
- **Travel for training courses, where appropriate**
- **Other ad-hoc trips where a hotel booking is required**
- **All accommodation bookings**

To make a booking, please contact the Travel Counsellor team at sedbergh@mytc.com

This policy, except for the mandated booking arrangements above, does not apply to travelling whilst undertaking the supervision of children. Such trips are covered by the 'Educational Visit Policy'.

2) Company Expectations and Policy Compliance

It is not possible to accommodate every conceivable situation, so staff are required not only to adhere to the terms in this policy, but also to exercise judgement to ensure that all claims made are considered reasonable.

As an employee you are expected to:

- Behave honestly, responsibly, and within the guideline of this policy.
- Submit expenses claims within 30 days of incurring expenditure and with enough details to explain why you have made the purchase
- Seek **prior** authorisation to travel from your line manager (and relevant budget holders, if different)
- Keep all receipts and provide receipts

As a manager you are expected to:

- Check that purchases comply with the policy
- Check the accuracy of staff claim
- Approve claims within one week of receipt

The School assumes no obligation to reimburse employees for expenses that are not in compliance with this policy. Employees who do not comply with this policy may be subject to delay or withholding of reimbursement. Persistent or deliberate non-compliance may result in disciplinary action.

3) Making a claim

Claims must be submitted on a Sedbergh School expenses claim form, signed off by your line manager.

If an expense is incurred for costs where your line manager is not the budget holder, the budget holder's approval must be received before submitting to your line manager for final approval. The budget holder signs on the appropriate lines of the expense form first and the Line Manager then signs overall at the bottom of the form. Were the budget holder and line manager to be the same person, the sole signature as the Line Manager suffices.

Employees must submit expense reports no later than 30 days following the completion of the trip or of incurring the expense.

Employees must submit the following documentation with their Expense Form:

- Air/Rail – passenger receipt
- Hotel – hotel invoice or other proof of payment
- Car Rental – credit card receipt or rental agency invoice
- Taxi – receipt and journey details
- Entertainment – credit card receipt or till receipt
- Meals – credit card receipt or till receipts

Receipts can be submitted electronically to <purchaseledger@sedberghschool.org> alongside a copy of the completed expense claim form.

Where expenses are paid for a group of employees, the most senior should pay and make the claim, noting the names of the other employees in attendance.

Where expenses are included for business related meals and entertainment the names of the individuals present should be included on the claim form.

When a receipt is not available, a full explanation of the expense and the reason for the missing receipt is required. Actual bills/receipts must be submitted whenever possible.

Disregard for company policy or altering of receipts may result in disciplinary action.

4) What's Allowable

Travel Related Expenses

a) Mileage

You can claim 45p per mile for the first 100 miles of a trip and 25p thereafter. A trip includes the return journey if done on the same day.

b) Air Travel

Air travel reservations should be made through Travel Counsellors.

When traveling by air;

- Employees are expected to use economy airfare.
- Flights should, where possible, be booked well in advance – fully flexible fares should only be selected where there is a business need to do so.
- Employees are expected to use non-direct flights when the savings are substantial.
- Obtain COO or Principal prior approval for all international travel.
- All air travel should be economy class unless the premium economy/business class ticket is less or the same price, OR the flight is more than eight hours and the approval of the COO has been obtained.

Upgrades for Air Travel

Upgrades for air travel are not reimbursable. If an employee wishes to upgrade, it is at the employee's expense.

Airport Parking

When parking at an airport is part of business travel, it is expected that employees will utilise the most appropriate parking lot for their time away, including consideration of return time. Short term parking fees will not be reimbursed.

c) Rail Travel

Rail travel should be standard class and booked through Travel Counsellors.

d) Taxis/Transfers

Where taxis/transfers provide the most appropriate means of travel, receipts must be submitted, and journey details included on the claim form.

Taxis should not be used to travel on a journey in excess of 30 miles without the prior permission of SLT.

e) Car Rental

Employees may rent a car to get to their destination when driving is more cost effective than airline or rail travel. Employees may rent a car at their destination when it is less expensive than other transportation modes such as taxis, airport shuttles, or when entertaining customers. When plans change, employees are responsible for revising previously made reservations.

Reimbursement will be made for the equivalent public transport journey or hire car cost – whichever is the lower.

When picking up a rental car, check with the rental agent for any promotional rates, last-minute specials or free upgrades. At the time of rental, inspect the car and be sure that any damage found is noted on the contract before the vehicle is accepted. Agree to take additional damage waiver supplements in car rental agreement, if reasonable, to minimize excess and any potential costs should you be involved in an accident.

Employees must reserve a car in the compact category unless:

- An upgrade is available at no extra cost
- Two or more colleagues are traveling together
- Entertaining customers
- Cars in the authorised category are not available
- Transporting excess baggage required for business.

f) Mobile phones and internet connectivity

Use free wi-fi whenever possible. Reasonable internet connectivity charges can be added to a hotel bill unless already part of the negotiated rate.

Also see Mobile Phone Policy.

Additional Travel Related Expenses

The following travel-related expenses are acceptable and will be reimbursed;

- Baggage (no more than two bags) and advance seat bookings
- Parking
- Foreign currency charges
- Visas
- Agency booking fees
- Laundry / Dry Cleaning / Suit Pressing for trips exceeding three days
- The hire/use of a GPS with hired cars in unfamiliar locations.
- Office services (eg faxes, copies, overnight delivery/postage)

Staff Hotels and Accommodation

Hotel reservations should be made through Travel Counsellors and in line with the suggested maximums as below:

UK hotels:	£110 per night excluding breakfast
London & overseas hotels:	£200 per night excluding breakfast

Where higher rates are required, or rates exceed the above amount prior authorisation is required by the COO or Headmaster.

Booking in advance can often secure a preferential rate.

You are responsible for all hotel cancellations.

Always inform others of your overnight location so the School can comply with its Duty of Care requirements. Tell your line manager (or a team member if they are away).

Food & Entertainment

Staff on School business can claim for meals while staying overnight, or if travelling for business before 7am or after 8pm and are away from the office for more than half a day. The amount you can claim for depends on purpose of the trip.

a) School Business

The maximum spend limits are;

- Hotel breakfast – £15
- Other breakfast – £10
- Lunch – £15
- Dinner (including **one alcoholic** drink) – up to £30

b) CPD Courses

For any travel expenses relating to teacher CPD courses, please consult with the 'CPD Policy for Teachers at Sedbergh' policy.

Client meals/entertainment costs may be higher but with the prior approval of the COO or Headmaster and against a hospitality budget.

All entertainment claims must include a business reason and the name of the company of all attendees – even those who work for the School. This ensures the School complies with the UK Bribery Act (Appendix 2) and HMRC rules.

Wine may be purchased for hosting potential candidates at the School. This must not exceed £10 per bottle of wine and for half bottle per head. This is to be charged to the recruitment hospitality budget and approval must be obtained from the budget holder prior to purchase.

Entertainment Expenses: Entertaining Customers

Entertainment expenses include events such as theatre and sporting events, whereby a business discussion takes place during, immediately before, or immediately after the event. Approval for reimbursement of entertainment expenses can only be granted by the budget holder on receipt of the completed expense claim form, and will only be granted if the:

- Person entertained has a potential or actual business relationship with Sedbergh.
- Expenditure directly precedes, includes or follows a business discussion that would benefit the School.

EXCEPTIONS

The following are examples of items that would **not** be reimbursable under this policy:

- Airline club / Country club membership dues
- Parking tickets or other fines
- Excess baggage charges for non-business items
- Expenses for travel incurred by companions or family members
- Expenses related to vacation or personal days while on a business trip
- Loss or theft of personal funds or property
- Avoidable cancellation charges for hotel or car service
- Rental car upgrades
- Repairs due to accidents
- Excessive mini-bar charges

Travel Risk Assessment

Where an employee travels to a destination where there may be credible risks to personal

safety, it may be necessary to take relevant precautions in order to mitigate such risks.

You should always research the country/city you are visiting and consider the risks and specific issues relevant to your trip. Prior to travel, all employees should read the Travel Planning tips & Risk Assessment guidance at Appendix 1, and access the FCO website at <https://www.gov.uk/foreign-travel-advice> for local updates.

Heads of Department/Line Managers and the staff travelling must have fully considered any potential risks in advance, in order to be able to make an informed judgement on whether or not to travel, and to be aware of the steps to take in an emergency.

Updated: November 2025

Appendix 1

Travel Planning Tips & Risk Assessment Guidance

1. **Check whether there are any special occasions** such as public holidays/local elections/political conferences/major sporting events in the destinations you are travelling to. As well as affecting prices, hotel availability and traffic, security may be heightened, and the likelihood of terrorist attacks can increase.
2. **Make three copies of your itinerary, passport & visa.** Pack one copy separately from the originals, leave one with your office and one with your emergency contact person. Please note: many countries will require you to carry your passport/id at all times. Having another copy in your luggage will help if your originals are lost/stolen/confiscated.
4. **Use hotel brands you know and trust or are recommended.** Reputable hotels are not just for comfort, they have higher security standards and good medical emergency procedures.
5. **If you are travelling to a country you have not been to before - do some research.** While you may have been to a neighboring country, there will be differences and country-specific issues to consider. Visit the [FCO website](#) – Travel and living abroad for advice.
7. **Check the medical provision and school insurance cover before you go.** Although you will be covered by School insurance, there may be specific requirements by country. Ensure you have the details of the school policy with you.
8. **If on medication.** When carrying own medication, take a copy of your prescription with you and note the generic names. If you have any doubt about the legality of a certain drug in a country, consult the embassy or consulate of that country first. Keep medicines in their original containers. If a medication is unusual, carry a letter from your doctor attesting to your need to take the drug. Take enough medication for the duration of your trip plus seven days (for emergencies).
9. **If taking IT equipment.** When taking IT equipment please ensure that all security obligations as per the Use of IT Policy are complied with.
10. **Review any vaccine requirements for your destination of travel.** Visit <https://travelhealthpro.org.uk/>

Risk	Measures to be taken
Health	<ul style="list-style-type: none"> – During the current coronavirus outbreak, all travel must comply with the latest statement made by the Principal that can be found on the Coronavirus Intranet Page
Crime	<ul style="list-style-type: none"> – Be aware of credit card fraud – do not allow cards to be taken out of your sight – Never resist a mugger – Do not wear expensive jewelry – Ensure that your office & emergency contact person have copies of your itinerary & passport/visa – Make yourself aware of any common scams and think about how to react if you are approached – Use the safe in your hotel room and use the security chain while you are in your room – Ensure you have the numbers required to cancel credit cards and travelers' cheques – Do not carry all money and cards together
Terrorism	<ul style="list-style-type: none"> – Be fully aware of the current security situation in the cities you are visiting – Ensure you follow the recommendations for local transport (below) – Check dates of trip against public holidays etc.
Conflict	<ul style="list-style-type: none"> – Be fully aware of the current security situation in the cities you are visiting
Political	<ul style="list-style-type: none"> – Avoid all demonstrations – Prepare an alternate travel plan if strikes are anticipated – Check dates of trip against local elections, major sporting events and public holidays
Kidnap	<ul style="list-style-type: none"> – Maintain a low public profile – Do not publicise your itinerary, but notify your family and colleagues of your movements as much as possible – Be alert to suspicious persons, vehicles and activity, particularly in the vicinity of your accommodation – Pre-program your mobile phone to the emergency services.

Risk		Measures to be taken
Infrastructure	Transportation	<ul style="list-style-type: none"> – Arrange a hotel transfer or reliable local contact to collect you from the airport on arrival – Use hotel cars or recommended taxi companies – Be aware of road conditions, especially when travelling outside of main cities – If driving yourself, ensure that you have the correct insurance, license and permits and are fully aware of local driving regulations – If using local buses, be wary of the roadworthiness of the vehicle and safeguard your belongings and wear your seat belt, even if the locals do not
	Medical capabilities	<ul style="list-style-type: none"> – Check for medical advice and capabilities overseas from School insurers – Ensure you pack a sufficient amount of any prescribed medication for your trip plus 7 days extra
	Contaminated food	<ul style="list-style-type: none"> – Eat only recently prepared food that has been thoroughly cooked – Drink sufficient liquids to prevent dehydration – Busier restaurants may be safer as they are more likely to serve freshly cooked food
	Contaminated water & drinking water	<ul style="list-style-type: none"> – Drink bottled water only – Use bottled water to brush your teeth – Avoid ice in drinks
	Utilities	<ul style="list-style-type: none"> – Check compatibility of all electrical equipment being taken – Pack sufficient torches, batteries and travel plugs – Charge your mobile phone daily
Natural Risks conditions	Climate	<ul style="list-style-type: none"> – Be aware of the weather forecasts for the dates of your trip and pack appropriate clothing – Use high-factor sunscreen and carry a bottle of water in hot conditions – Avoid strenuous activity during the hottest part of the day
	Natural disasters	<ul style="list-style-type: none"> – Ask your hotel reception for emergency procedures – Make a note of the contact details for the local British High Commission/Embassy – Ensure that the School & emergency contact person have copies of your itinerary & passport/ visa

Risk	Measures to be taken
Contact with insects	<ul style="list-style-type: none"> – Ensure that you have the required inoculations before travelling – Consult your GP for malaria advice where necessary
Cultural Risks Local Culture Legal differences	<ul style="list-style-type: none"> – Ensure that you are aware of and respect local religious restrictions and festivals – Dress appropriately at all times – Be aware of causing offence when taking photographs of local people and DO NOT take photographs near police or military establishments <hr/> <ul style="list-style-type: none"> – Be aware of any local laws that are different to the UK (see Local Culture section on FCO country page) – Take a copy of your prescription in your hand luggage (some medications which are legal in the UK are not legal overseas – check the embassy website of the country being visited) – Ensure that you have all the required up-to-date permits

Appendix 2

Bribery Act 2010

The Act is concerned with bribery. Very generally, this is defined as giving someone a financial or other advantage to encourage that person to perform their functions or activities improperly or to reward that person for having already done so. So this could cover seeking to influence a decision-maker by giving some kind of extra benefit to that decision-maker rather than by what can legitimately be offered as part of a tender process. The Act is not concerned with fraud, theft, books and record offences, Companies Act offences, money laundering offences or competition law.

All staff must familiarise themselves with The Bribery Act 2010 : Checklist in the School policies directory and all gifts or hospitality valued in excess of £50 must be recorded in the School's Gift Register (information should be sent to Debbie Saunders by email: Debbie.saunders@sedberghschool.org).

GDPR Statement

We may process your personal information for carefully considered and specific purposes which are in our interests and enable us to enhance the services or information we provide. We will always keep your details safe and secure. 'We' includes Sedbergh School, the charity, it's charitable and all trading subsidiaries.

Our Privacy Notices can be found on our website (<http://www.sedberghschool.org/senior/Privacy-Policies>) or by request from the Deputy Bursar (Compliance), Sedbergh School, Malim Lodge, Sedbergh LA10 5RY. (tr@sedberghschool.org) If you have any concerns about the data we hold or do not wish to receive any further communications from us, please contact the Deputy Bursar (Compliance).