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IOE Confucius Institute Teacher Training Travel, Accommodation and Other Expenses Policy

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Introduction

1. This policy sets out the rules and regulations for reclaiming expenditure for travel and accommodation for the IOE Confucius Institute (IOE CI) Teacher Training Programme. The rates for all allowances are given in rates set out in paragraphs **26 to 29** below.
2. The aims of this policy are to:
 - provide a common understanding of which expenses can be reclaimed when attending IOE CI Teacher Training;
 - increase the value for money obtained from travel;
 - help develop a culture in which participants take account of the cost of travel;
 - provide participants with help in making informed travel choices.
3. These guidelines apply to participants who take part in IOE Confucius Institute Teacher Training. They are intended for all teacher training participants who:
 - make travel arrangements for themselves;
 - is involved in approving travel and accommodation claims for IOE CI teacher training; or
 - are responsible for managing a training and accommodation budget for IOE CI teacher training.
4. This policy is primarily concerned with regulations for reclaiming expenditure.
5. For the purpose of IOE CI Teacher Training, this version replaces all previous IOE Travel & Subsistence policies for IOE CI Teacher Training attendees.

General principles

6. The Institute will only reimburse actual and reasonable expenses incurred wholly, exclusively and necessarily in the course of attending IOE CI Teacher Training and in accordance with the maximum rates set out in these guidelines.
7. Expenses reimbursed or charged directly to the Institute within the limits set by these guidelines will not give rise to a tax and national insurance liability.
8. The Institute will not reimburse costs incurred for spouse, partner or any other family member.
9. Normal commuting expenses between the home and permanent workplace will not be reimbursed.

10. All claims must be made within three months of the costs being incurred. This is to ensure that sufficient funds are available to meet the cost. Claims that are not made within three months may not be paid as the IOE cannot guarantee that there will be sufficient funds to meet the cost.

Value for money

11. **Teacher training attendees should attend their nearest event geographically.** Should attendees choose to attend an event that is further afield, they are only entitled to claim the cost of travel to their nearest event, or whichever cost is the lowest. (Authorising officers may request evidence to ensure that the expenditure incurred to attend IOE CI teacher training is in line with this guideline).
12. Teacher training attendees are required to undertake all travel in the most economical and cost effective way, and this should be taken into account when selecting the mode of travel.
13. In accordance with point 12, motorcar mileage will not be reimbursed, unless participant can prove it is better value than public transportation charges.
14. No parking fees will be reimbursed.
15. All rail travel must be standard class. No first, business or premium class travel is permissible.
16. Pre-booking of tickets produces a significant discount. Teacher training attendees shall plan journeys and have them booked as far ahead as possible to ensure that full advantage can be taken of early booking discounts.
15. Oyster prepay is one of the most effective ways to pay for individual journeys in London. Teacher training attendees intending to make travel claims on their Oyster Card must register it so that receipts or a statement of journey history may be obtained. Claimants may be required to provide this as proof of expenditure.

Evidence

16. Payment requests must be accompanied by adequate supporting documentation which will normally comprise original invoices, bills or receipts and must provide sufficient information for the Finance and Estates Department staff to ascertain whether the payment should be subject to taxation or should be paid at all.

17. Photocopies of supporting documentation, including receipts and invoices, will only be accepted by the Finance and Estates Department if there is a valid reason for the claimant retaining the original. All copies must be legible and certified as a “True Copy” of the original document by the claimant.
18. The Finance and Estates Department may exceptionally pay claims without receipts if the amount is less than £10 in total.

Expense claim and payment

19. All claims must be for expenses that have been incurred to attend an IOE CI training event. A standard claim form must be completed and authorised in accordance with the Financial Regulations, and submitted to the IOE Confucius Institute project team.
20. Claims should be completed and submitted on an expense claim form.
21. Claims for reimbursement of expenses by individuals who are not employees and therefore do not have access to the Institute’s Finance System may use the “Non Staff Expenses Claim Form” available on the Institute’s intranet (see links below).

http://ioe-net.inst.ioe.ac.uk/doccentre/Finance/Non-Staff_Expenses_Claim_Form_WP_11.03.13_RE.pdf (internal IOE link)

or

http://ciforschools.files.wordpress.com/2014/06/non-staff_expenses_claim_form_wp_11-03-13_re.pdf (external)

Authorising officers are required to ensure the expenditure has been incurred to attend IOE CI teacher training and is in line with these guidelines.

22. Expense claims are processed weekly and paid by BACS. Consequently, for non-staff claims, the claimant’s bank details must be provided on the claim form.
23. The Institute will not reimburse expenses by cheque.
24. The Finance and Estates Department staff will double check claims are correct, reasonable and in line with IOE policy. Therefore claims may be routinely questioned with the claimants.

Subsistence

25. Meals: cost of meals will not be reimbursed for the IOE CI Teacher Training.

Accommodation

26. Where attendees at IOE CI Teacher Training need to stay away from home overnight in connection with official business, they should be accommodated at a safe, clean, comfortable hotel within reasonable travelling distance of the office/venue they are visiting.
27. Accommodation will only be paid on the nights of the event itself, excluding the final day. (For example, for an event spanning Friday-Sunday, only Friday and Saturday accommodation can be claimed). Accommodation pre- and post-event will be at participants' own cost.
28. Attendees should book their own hotels and claim for reimbursement.
29. Guidance for overnight accommodation:

Area/ Region	Guide rate per night
London	£115
Rest of UK	£95

30. If you require further information on this policy, please contact:

Post	Telephone	Email
IOE CI Teacher Training Coordinator	020 7612 6492	chinesenetworks@ioe.ac.uk

31. Responsibility for updating and administering this policy rests with the IOE CI Teacher Training Coordinator.

Any false claim can lead to disciplinary action and/or criminal prosecution.