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Bord Oideachais agus Oiliúna
Mhaigh Eo, Shligigh agus Liatroma
Mayo, Sligo and Leitrim
Education and Training Board

Mayo, Sligo and Leitrim Education and Training Board

Travel and Subsistence Policy V2.0

MSLETB,
Finance Department,
Newtown,
Castlebar,
Co. Mayo
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This document serves as a Guide/Policy/ Procedure for Staff and Committee Members of Mayo, Sligo and Leitrim Education and Training Board (MSLETB).

Any queries or questions arising from this document should be addressed to the Finance Department MSLETB Admin Office, Newtown, Castlebar, Mayo.

As with all communications within MSLETB, staff are reminded to treat all information in respect of requesters in the strictest of confidence.

1 Purpose

This policy sets out the protocols and procedures to be followed by staff when travelling on Mayo, Sligo and Leitrim Education and Training Board (MSLETB) business.

The travel and subsistence policy has been framed having regard to the following:

- a) Department of Education (DE) Circular Letters
0011/1982, 0005/2015, 0031/2015, 0036/2017, 0037/2017, 0039/2017, 0038/2019, 0039/2019, 0052/2022, 0053/2022, 0064/2023. See section 11 'References' for links to circulars.
- b) Circulars issued by the Department of Finance and/or the Department of Public Expenditure and Reform (DPENDPR formerly known as DPER).
- c) The efficient conduct of MSLETB business and
- d) Revenue requirements in relation to expenses paid to employees. Only expenses which are 'wholly, exclusively and necessarily' incurred in the performance of a staff member's duties may be re-imbursed on a tax-free basis.

2 Scope

The policy applies to all travel undertaken on ETB business regardless of the budget from which travel is funded (school/centre non-pay, other funds, self-financing budget).

3 General Principles in relation to staff and Members of Statutory Committees travelling on ETB business.

- a) An allowance shall be paid only in respect of travel and subsistence expenses actually and necessarily incurred in the performance of an employee's official duty. All official travel should be by the shortest practicable route (*as per AA route planner*) and by the cheapest practicable mode of conveyance.
- b) An officer/employee will be authorised to use private transport for reasons connected with the ETB business only in the following circumstances:
 - No suitable public transport (i.e. train or bus) is available.
 - Public transport is suitable only at equal or greater expense.
 - The use of public transport would result in the loss of official time.
- c) All Staff, Members of MSLETB and its Statutory Committees and other persons conducting official business on behalf of MSLETB must read and accept the Indemnity Declaration presented in the T&S system when any claim is being made. The authorisation to use their own motor vehicle is subject to any relevant regulations or conditions in force from time to time and, in particular, to the condition that it is insured, and will continue to be insured, for the purpose of the Road Traffic Act 1961. It is the responsibility of each person to inform their own motor insurers of the intention of such official business use, to ensure it is included on their motor insurance policy and to notify MSLETB of any changes made. The Department of Education and/or MSLETB will not accept liability for any loss or damage resulting from the use of their own motor vehicle on official business, including professional development.

- d) Where a staff member travels to a location from home or returns home direct, the mileage payable will be calculated by reference to the distance from home or normal place of work, whichever is the lesser.
- e) Travel is not payable in respect of any portion of a journey which covers all or part of a staff member's usual route between home and headquarters.
- f) Where more than one person is travelling to the same meeting, arrangements should be made to avoid unnecessary duplication of the use of more than one car.
- g) Deductions to be made from the subsistence rate to take account of meals provided to an officer at no cost to him/herself, are as follows:
 - Where lunch or dinner is provided, a 5-hour rate should be deducted.
 - Where both lunch and dinner are provided, a 10-hour rate should be deducted.
- h) Incurred costs e.g. Parking, Tolls, Taxi's will only be re-imbursed when receipts are provided.
- i) T&S claims for training for both staff and members will be payable at the reduced rates contained in Appendices 1 & 2 on Circular Letters 36/2017 & 39/2017 respectively.
- j) Payment of rates authorised are subject to (Circular Letter 11/1982) and any other instruction in force from time to time, including the distance requirements outlined in DPER (Circular Letter 05/2015).
 - Subsistence allowance is not payable for any absence at any place within 8km of the place of work or a person's normal place of residence.
 - An overnight allowance will normally only be claimed when you are 100km or more away from your home or place of work.

4 Payment of Claims

- a) Claims must be submitted in a timely manner and in all cases no later than 3 months after the journey was undertaken. Claims submitted in excess of 3 months from date of travel will be monitored and reported to the CE for consideration and action.
- b) All claims for re-imburement of travel and subsistence must be authorised by the appropriate line manager/budget holder.
- c) All claims must include.
 - Purpose of the journey.
 - Mode of transport used.
 - Cubic capacity of the engine if private transport is used.
 - Date(s) and times of departure from and return to place of work/claimant's residence.
 - Number of kilometers travelled. (Using AA Route planner to calculate).
- d) Incomplete/incorrect claims will be returned to the claimant for amendment and re-submission and may result in late payment.

5 Travel and Subsistence to Members of Boards of Management of Schools, Finance Committee and Audit & Risk Committee.

Travel and Subsistence will be made available to members of Boards of Management of Schools in accordance with the provisions of the Education and Training Boards Act 2013, any other relevant legislation and any directions of the Minister for Education, the Minister for Finance or the Minister for Public Expenditure and Reform

- a) Travel allowances for members of Boards of Management are to be capped at 20km per single journey by private car. Where travel is undertaken by bus or train, only vouched expenses will be payable.
- b) Subsistence allowances will not be payable to members of Boards of Management for attendance at board meetings.
- c) External members of Audit or Finance Committees who are in receipt of a fee for attendance at the Audit & Risk Committee or Finance Committee are not entitled to claim travel and subsistence expenses.

6 Staff Sharing between Centres/Schools

Travel and Subsistence allowances are not paid to staff working in more than one school/centre. However, in a case where a staff member is obliged by the ETB to work between more than one centre/school, specific approval of eligibility to claim travel and subsistence must be issued from Director/CE in advance. (Circular Letter 15/2019).

7 Foreign Travel

Only essential travel is to be undertaken and the number of officers on any journey must be kept to an absolute minimum. Prior sanction by the Chief Executive is required for any expenditure incurred out of public funds on visits abroad. For further guidance on foreign travel refer to Appendix A. Foreign Travel Guidance & Procedure.

8 In-Service Expense Claims

In-service claims must be submitted via the T&S system and the appropriate in-service documentation (Certificate of Attendance – signed on the day by the course organiser and/or Application for Inservice Leave) attached to the claim within the system.

9 Vehicle Details

Claimants should ensure that they hold the necessary class of car insurance before using their personal car for business travel. Claimants must ensure that they have read, understood, and

accepted the terms and conditions as set out in the T&S system as per the Indemnity Declaration form (Circular Letter 37/2017) prior to submitting claims.

Claimants are required to declare their engine CC and provide their vehicle registration number with their first travel claim and subsequently where there is a change of vehicle. The claimant is responsible for updating all vehicle information in the T&S system.

10 Review

This policy will be subject to review in accordance with organisational needs and/or where it is necessary to do so due to changes in Government Department Circular Letters, legislation, or other such situations.

11 References

Department Circular Letters

<https://circulars.gov.ie/pdf/circular/finance/1982/11.pdf>
<https://circulars.gov.ie/pdf/circular/per/2015/05.pdf>
<http://circulars.gov.ie/pdf/circular/education/2015/31.pdf>
<https://circulars.gov.ie/pdf/circular/education/2017/36.pdf>
<https://circulars.gov.ie/pdf/circular/education/2017/37.pdf>
<https://circulars.gov.ie/pdf/circular/education/2017/39.pdf>
<https://circulars.gov.ie/pdf/circular/education/2019/15.pdf>
<https://www.gov.ie/0038/2019.pdf>
<https://assets.gov.ie/0039/2019.pdf>
<https://www.gov.ie/0052/2022.pdf>
<https://www.gov.ie/0053/2022.pdf>
<https://www.gov.ie/0064/2023.pdf>

Appendix A - Foreign Travel Guidance and Procedure



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Foreign Travel Guidance and Procedure

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- **Introduction**

Purpose of this Document

The purpose of these foreign travel guidelines is to ensure transparency and consistency in MSLETB's travel expenditure, along with the aim of minimising our carbon footprint while still achieving our objectives. These guidelines provide detailed instructions to help claimants and authorisers navigate the travel authorisation and reimbursement process.

Travel expenditure is governed by the following principles:

- The travel must be necessary and exclusively for MSLETB's business.
- The travel must benefit MSLETB.
- School tours must be educational and provide students with unique learning experiences that are not available in the classroom.
- The travel expenses must be properly documented.
- The travel must be planned to minimise carbon footprint while balancing time constraints and available transport options.
- The travel must be managed consistently and cost-effectively.
- The purpose of travel outside of school tours must be clearly stated to enable third-party reviewers to understand why the expenditure occurred.

Scope and Constraints

These guidelines apply to anyone travelling on behalf of MSLETB regardless of funding source, whether within Ireland or abroad.

Authorisation

The Chief Executive is responsible for determining whether travel is essential for MSLETB's purposes. Confirmation that the appropriate budget, if required, is available to cover the full cost, including indirect expenses must be provided at time of application. All employees must seek to minimise travel expenses, and only essential travel is allowed, with the minimum number of officers travelling. Sanction from the Chief Executive is required for all expenditures incurred using public funds on visits abroad, except for Erasmus Mobility or Educational School Tours, for which the Director's approval is necessary. Travel should be planned to minimise distance and to use the most economical mode of transportation.

1.4 Categories of Foreign Travel

The four categories of foreign travel for MSLETB are:

- Erasmus
- Conferences
- Professional Development Courses
- School Tours

- **1.4.1 Erasmus**

Approval for Erasmus Mobility must be obtained from the relevant Director as soon as possible, and at least six weeks prior to the trip. The request must include the names of the staff participating in the trip, and any last-minute staff changes due to unforeseen circumstances must be communicated promptly. Flights should not be booked until the relevant Director has approved the request. Claimants must also confirm that appropriate travel insurance will be in place for the duration of the trip.

- **1.4.2 Conferences**

Sanction from the Chief Executive is required at least six months prior to attending overseas conferences. The request must include details of the conference, costs, and the line manager's approval. If an employee requests unpaid leave to attend a conference, they must seek sanction six weeks prior to their departure date at foreigntravel@msletb.ie and provide HR with the dates and a copy of the sanction from the Chief Executive. Failure to follow this process may result in delayed salary payment. Claimants must also confirm that appropriate travel insurance will be in place for the duration of the trip or that MSLETB is / will be indemnified.

- **1.4.3 Professional Development Courses**

Approval for attending overseas Professional Development Courses must be obtained from the Chief Executive at least six weeks one month prior to the trip. The request must include details of the course, costs, and the line manager's approval. If an employee requests unpaid leave to attend a course, they must seek sanction six weeks prior to their departure date at foreigntravel@msletb.ie and provide HR with the dates and a copy of the sanction from the Chief Executive. Failure to follow this process may result in delayed salary payment. Claimants must also confirm that appropriate travel insurance will be in place for the duration of the trip or that MSLETB is / will be indemnified.

- **1.4.4 Educational School Tours**

Approval for foreign educational school tours must be obtained from the relevant Director, either the Director of Schools or the Director of FET, at least six weeks prior to travel. An advisory note with the tour details, including the staff travelling, must be presented when seeking approval. No bookings should be made until approval is granted. Claimants must also confirm that appropriate travel insurance will be in place for the duration of the trip or that MSLETB is / will be indemnified. Any proposed changes to staff travelling for an already approved tour, must be communicated to the relevant Director before departure.

For paid and unpaid leave please email foreigntravel@msletb.ie

**Please note that the Chief Executive retains the right to approve or deny any travel request.
Any Staff member who travels, or any approver who knowingly allows a person to travel on a non-approved or denied request may be subject to MSLETB's disciplinary process**

These guidelines will be reviewed annually to ensure relevance.

Appendix B – Foreign Travel Approval Form

MSLETB Foreign Travel Approval Form

Purpose of Travel: _____

Category of Travel: Erasmus / Conferences / Professional Development Courses /
Educational School Tours

Destination: _____

Departure Date: _____ Return Date: _____

Estimated Cost (EUR): _____ Funding Source: _____

Reason for Travel (please provide a brief explanation of the purpose of travel):

Number of Staff Travelling: _____

Names of Staff Travelling:

I confirm that appropriate travel insurance will be in place for the duration of the trip.

Signature: _____ Date: _____

Line Manager Approval:

I confirm that the travel is necessary for MSLETB's purposes, and the appropriate budget is available to cover the full cost, including indirect expenses.

Signature: _____ Date: _____

Director Approval (for Erasmus Mobility or Educational School Tours only):

I confirm that the travel is essential for MSLETB's purposes, and appropriate arrangements have been made to ensure the safety and welfare of staff and students. I also confirm that the travel is consistent with the principles that govern travel expenditure.

Signature: _____ Date: _____

Chief Executive Approval:

I have reviewed the above travel request and approve the travel as necessary and beneficial for MSLETB's business. (For all travel using public funds on visits abroad, sanction from the Chief Executive is required.)

Signature: _____ Date: _____