



Westcountry Schools Trust (WeST)

CORPORATE BUSINESS TRAVEL (ALLOWANCES AND EXPENSES) POLICY AND PROCEDURES

Mission Statement

WeST holds a deep seated belief in education and lifelong learning. Effective collaboration, mutual support and professional challenge will underpin our quest to ensure that all of the children and adults we serve are given every opportunity to fulfil their potential and succeed in life.

Westcountry Schools' Trust adopted this policy in September 2018

Westcountry Schools' Trust will review this policy annually

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POLICY HISTORY

GENERAL

1.0 Introduction

- 1.1 This document sets out Westcountry Schools Trust's policy and procedures in relation to business travel, including the reimbursement of business travel costs (e.g. mileage allowances, and meal and overnight accommodation expenses), necessarily incurred by employees whilst travelling on the organisation's business.
- 1.2 Employees should be aware that some payments for business travel have tax and National Insurance (NI) contribution implications. This document has been prepared in accordance with Her Majesty Revenue and Customs (HMRC) guidelines, and failure to comply may have tax, interest and penalty implications for both Westcountry Schools Trust (WeST) and an individual employee.

2.0 Scope

- 2.1 This policy applies to all WeST employees, including those based in schools where they have been adopted.

3.0 General Principles

- 3.1 Employees will be made aware of this policy and procedures, and the business travel allowances and expenses to which they may be entitled.
- 3.2 Business travel allowances and expenses are paid to employees in accordance with applicable national and local agreements.
- 3.3 Employees who necessarily incur additional costs in the course of their work in respect of business travel will be reimbursed approved allowances and expenses, where they are claimed as set out in this policy and procedures.
- 3.4 Employees should only make claims for additional business travel costs actually and necessarily incurred, and any deliberate contravention to this may result in disciplinary action being taken against an individual employee.

4.0 Equalities

- 4.1 HR will ensure that employees are able to access a copy of the policy on the WeST website.
- 4.2 WeST and our schools seek to eliminate discrimination, advance equality and foster good relations.
- 4.3 WeST and our schools are committed to the principle of equal opportunities in employment regardless of a person's age, disability, gender re-assignment, marital or civil partnership status, pregnancy, maternity status, race (including colour, nationality and ethnic or national origins), religion or belief, sex and sexual orientation.

5.0 Responsibilities of Managers

5.1 Managers' responsibilities in relation to business travel to include the following:

- Making themselves aware of this business travel policy and procedures and related information where appropriate.
- Making employee's whom they manage aware of policies and procedures and that they abide by them
- Checking that all travel claims are reasonable within the guidelines given (e.g. that they are cost effective, that an appropriate mode of transport is used, that mileage is correct and that any overnight stays are operationally necessary)
- Advising employees who are claiming expenses, that they are responsible for keeping VAT receipts for 2 years in accordance with this policy. This policy sits separately to any Inland Revenue requirements for the retention of VAT records in relation to matters outside this policy.

5.2 Managers have additional responsibilities in respect of employees who drive motor vehicles for business use (see 14.0 Transport Safety and Insurance Requirements etc.).

6.0 Responsibilities of Employees

6.1 The responsibilities of employees who undertake business journeys include the following:

- making themselves aware of this policy and procedures (and related information where appropriate) and that they abide by them
- maintaining an official record of each business trip including:
 - full particulars (e.g. dates, start and finish times, start and finish locations) and the reason for it
 - mileage readings, where applicable
 - names of official carried, where applicable
 - keeping evidence where additional expenditure has been incurred (e.g. a valid receipt, train or bus ticket, or other similar documents, where appropriate).
 - VAT receipts must be kept for fuel expenditure and expenses. All claimants must submit receipts supporting petrol and expenses claims to their local finance team. These must be kept for 2 years and stored in one envelope per month for easy retrieval of information for audit purposes. Receipts may be requested for compliance inspection at any time during that period. Failure to provide them may incur a personal tax liability and the service area could be liable for any interest or penalties that become due.

6.2 Employees who drive a motor vehicle(s) for business use have additional responsibilities (see 14.0 Transport Safety and Insurance Requirements etc.).

7.0 Monitoring and Audit

7.1 Business travel allowances and expenses will be monitored and internal audit may be requested.

8.0 Advice and Support

- 8.1 HR information and advice in respect of the interpretation or application of this policy is available from the HR Team.
Tel. 01752 891754. E-Mail HR@westst.org.uk

BUSINESS JOURNEYS

9.0 Definition of Business Journeys

- 9.1 Business journeys are defined as journeys made from an employee's normal place of work (or other designated place of work), with the authority of an appropriate manager, for the purpose of carrying out work on behalf of WeST.
- 9.2 Business journeys **do not** include:
- ordinary commuting – when an employee travels between home (or private location that is not a workplace) and a place that counts as a normal place of work
 - private journeys which are not part of an employee's job requirements.

10.0 Principles in Relation to Business Journeys

- 10.1 The basic principle which applies to all business journey claims is that costs/allowances must be claimed only for **additional** costs/ mileage which has actually been incurred when performing duties on official WeST business.
- 10.2 Costs/mileage will be paid according to the shortest practicable route for any journey, except when travel by a longer route has been authorised to reduce the journey time. Where an employee does not take this route, perhaps for personal reasons, any additional costs must be met by the individual employee.
- 10.3 Decisions regarding the mode of transport chosen for each business journey should be made between the employee and his/her manager as appropriate. (See 13.0 for more detailed information).
- 10.4 All rail travel, overnight accommodation and car hire must be booked through local booking systems.

11.0 Travelling Centre

- 11.1 The travelling centre from which costs/mileage may be claimed will be the employee's normal place of work, and this will be notified in his/her Statement of Particulars/contract of employment.
- 11.2 In normal circumstances, employees are themselves responsible for any costs incurred in journeys between their home and their normal place of work, and any such journeys are outside the WeST definition of business journeys (see 9.0). However, where a business journey is made from home for duty outside an employee's normal working hours, home will be regarded as the base for the occasion and all mileage incurred in making the journey may be claimed (as set out in 15.2).

12.0 Environment

- 12.1 WeST is committed to green travel and with the support of employees, the number of miles travelled and harm to the environment can be reduced and money saved. Employees are therefore required to think before they travel and ask themselves:
- is this journey necessary?
 - could this meeting be held in another way (e.g. telephone/video conferencing)?
 - what mode of transport is most appropriate for the destination(s), distance or time of travel? (See 13.0. below).
- 12.2 In many cases business travel can be substantially reduced by a little forward planning and co-ordination with other colleagues.

13.0 Modes of Transport

- 13.1 Decisions regarding the mode of transport chosen for each business journey should be made between the employee and his/her manager as appropriate. Where it is not reasonably practicable for an employee to walk or cycle, public transport must be used on all appropriate occasions. However, as well as environmental considerations, decisions should reflect all aspects of a situation including health, safety, any disability of the individual, destination(s), distance(s), time(s) of travel and value for money. The mode of transport must be reasonably practicable and meet business needs.
- 13.2 Employees must not travel independently on business journeys when there is room in the car of another employee making the same journey on the same business. As far as possible, journeys over the same route by other employees should also be arranged so as to synchronise.
- 13.3.1 Walking
- WeST supports walking to sites/ places of business.
- 13.3.2 Employee Bicycles
- Employees who provide a bicycle for business journeys may claim a mileage allowance (see Appendix 2 – Rates - Business Journey Allowances).
- 13.3.3 Public Transport (excluding Rail)
- Where the employee travels by public transport, the cost of the lowest available day rate or other cheap fare may be claimed.
- 13.3.4 Public Transport (Rail)
- Standard/ restricted class rail travel is the WeST norm for employees and the most

cost effective ticket must be purchased (e.g. "open" tickets may only be booked if an employee has no way of knowing what time his/her visit to another site/ place of business will finish).

Employees are also expected to take advantage of all types of "saver" tickets and special promotions (e.g. on occasions when a first class ticket can be purchased cheaper than standard/restricted ticket). The most effective way of ensuring minimum WeST expenditure is by booking as far in advance as is practicable.

The cost of any upgrade must be met by the individual employee.

All rail travel must be booked through local booking systems.

13.3.5 Taxis

Taxis should only be used for short journeys or where this is the most cost effective option (e.g. where three people share or where public transport is unavailable due to the time of day).

13.3.6 Car Hire

For business journeys in excess of 125 miles where an employee would otherwise use a privately owned motor vehicle that he/she provides, it is more cost effective for them to use a hire car instead. However, hire cars should not be used for business journeys under 30 miles without the authority of an appropriate manager as this is not cost effective.

The hire car driver will be fully responsible for any statutory, parking or moving traffic offence charges that occur during the hire period, including any administration charges incurred in processing the offence.

For all charges incurred the hire company will invoice WeST direct. The hire car driver and their manager will then be notified of the process and timescales for debt recovery.

All hire cars should be booked through local booking systems.

14.0 Transport Safety and Insurance Requirements etc.

14.1 Driving at work includes the use of privately owned vehicles, motorcycles and bicycles. For many employees the most significant risk to which they are exposed at work is driving and it is necessary for WeST, in common with other UK employers, to ensure that the risks of injury and loss through driving incidents are eliminated or minimised as far as is reasonably practicable.

14.2 It is therefore a requirement that employees who drive at work and their managers read in full the Drivers' Handbook in order that they are aware of their responsibilities:

- The Drivers' Handbook document can be accessed through Westcountry Schools Trust's website.

The above documentation sets out, for example:

managers' responsibilities for carrying out checks, both on appointment and for certain categories of work related journeys on an annual basis to ensure that each driver has the following:

- a current full (not provisional) driving licence that is valid for the type of vehicle being driven
- a roadworthy vehicle, where an employee drives a privately owned vehicle
- a current MOT certificate, where an employee drives a privately owned vehicle
- insurance cover that includes employer's business use, where an employee drives a privately owned vehicle.*

employees' responsibilities including:

- that in claiming for business mileage that they are continuing to confirm that they have all of the above arrangements and documents in place*
- informing their manager immediately when there is a change in circumstances (e.g. in respect of medical issues, their insurance, licence or vehicle).
- Complying with the Trust's Road Safety Guidance on Driving Hours and Break Rules as set out in the Drivers' Handbook.

* Where employees drive their own vehicle on WeST business, they must ensure that they have insurance cover that includes work related use e.g. "in connection with work or business including carrying passengers".

Manager's must ensure that the Business Travel Checklist [See – Appendix 6] is completed and signed by both the manager and the employee. The checklist must be retained on the employee's personnel file and updated annually.

- 14.3 WeST cannot be held responsible for fines relating to traffic offences on WeST business.

15.0 Different Types of Business Journeys from and to Home

15.1 Journeys from Home in Substitution for a Journey from the Normal Place of Work

Where a business journey is made from home in substitution for one from the normal place of work, the employee is entitled to claim only the **additional** costs (e.g. mileage) which have been incurred in excess of his/her normal commuting costs, as set out in the examples below.

The above principle applies to any such journey, including those which partially cover the route from home to base, those that include visits to multiple sites/places of business on the same day, and whichever mode(s) of transport are used.

(In exceptional circumstances and where authorisation is given to an individual employee by his/her manager, any additional costs (e.g. mileage) incurred to visit a site or other place of work may be claimed in full (e.g. where an employee normally commutes by public transport and when they have purchased a season ticket to do so)).

15.1.1 Public Transport

Where an employee's home to normal place of work commute is made by public transport and he/she also travels by public transport to undertake a business journey, only the **additional** costs which have been incurred in excess of his/her home to normal place of work commuting costs may be claimed.

Alternatively, where an employee's home to normal place of work commute is made by public transport but he/she uses his/her own transport (e.g. bicycle or car) instead to undertake a business journey, only the **additional** mileage which has been incurred in excess of his/her home to normal place of work commute may be claimed at the respective rate (see 16.0).

15.1.2 Employee Bicycles

Where an employee's home to normal place of work commute is made using his/her own bicycle and he/she uses it to undertake a business journey, only the **additional** mileage which has incurred in excess of his/her home to normal place of work commute may be claimed at the bicycle mileage rate (see 16.0).

Alternatively, where an employee's home to normal place of work commute is made using his/her own bicycle but he/she uses his/her own motor vehicle (car or motor cycle) instead to undertake a business journey, only the **additional** mileage which has incurred in excess of his/her home to normal place of work commute may be claimed at the respective mileage rate (see 16.0).

15.1.3 Employee Motor Vehicles

Where an employee's home to normal place of work commute is made using his/her own motor vehicle e.g. car or motorcycle and he/she uses it to undertake a business journey, only the **additional** mileage which has been incurred in excess of his/her home to normal place of work commute may be claimed at the respective rate (see 16.0).

Therefore:

- 1) Where an employee travels from home to visit a site/ place of business that involves a deviation before travelling to his/her normal place of work, only the **additional** mileage may be claimed (i.e. not the full journey from home).

Example: An employee lives in Tiverton and their normal place of work is in Exeter, a commute of 16 miles each way. The employee travels from home to Cullompton and then on to his/her normal place of work, a total distance of 20 miles. The employee may claim only the **additional** mileage of 4 miles.

- 2) Where an employee travels from home to a site/ place of business that is of a longer distance than his/her home to normal place of work commute, only the **additional** mileage may be claimed (i.e. not the full journey from home).

Example: An employee lives in Exeter and his/her normal place of work is in another part of Exeter, a commute of 3 miles locally each way. The employee travels to Exmouth and returns home, a distance of 10 miles each way. The employee may claim only the **additional** mileage i.e. 7 miles each way.

- 3) Where an employee travels from home to a site/ place of business that is of a shorter distance than an employee's home to normal place of work commute, mileage may not be claimed.

Example: An employee lives at Crediton and his/her normal place of work is at Exeter, a commute of 10 miles each way. The employee travels to Newton St Cyres and returns home, a total distance of 8 miles. This mileage may not be claimed.

15.2 Cases of Recall Outside of Normal Working Hours

- 15.2.1 Where a business journey is made from home for duty outside an employee's normal working hours (that may include a weekend or public holiday), home will be regarded as the base for the occasion and all mileage incurred in making the journey may be claimed, subject to the agreement of a Principal/Headteacher/Head of Service.

Recall outside of normal working hours refers to a period of work that is additional to an employee's usual pattern of working periods in any day/week etc. Examples include:

- a call out to deal with an emergency
- attendance at an evening meeting after an employee has completed his/her normal work for the day, and has gone home for the day
- a journey from home for duty on a day when an employee is not normally required to work (e.g. Saturday and Sunday) - provided that time off in lieu is not taken.

All claims of this type must be submitted as taxable.

Recall outside of normal working hours does not apply to journeys starting early from home or finishing late at home on an employee's ordinary working days when he/she visits a site/ place of business other than his/her normal place of work. Business journeys of this kind are covered under 15.1.

16.0 Business Journey Allowances

- 16.1 The business mileage allowances that apply are determined by WeST, as amended from time to time:

- **Cars** - The rates for cars are a standard rate across all engine capacities.
- **Car Hire** – any fuel purchases must be submitted in the normal way as set out in this policy (see 24.0).

- **Three Wheeled Vehicles** - For three wheeled vehicles, the rate for cars applies.
- **Motorcycles** - The rates for motorcycles are a standard rate across all engine capacities.
- **Bicycles** – A bicycle rates applies.
- **Training** – The training rate is the same as Cars (see above).
- **Passengers** - Car users may claim an additional amount per mile per "official passenger" within the insured capacity of the vehicle (see 14.2).

16.2 For the current allowances, see Appendix 2 – Rates - Business Journey Allowances

17.0 Car Parking

17.1 The provision of car parking space is not guaranteed at any WeST site for any employee and where there is no on-site parking provided, WeST does not pay for alternative parking. However, when an employee necessarily incurs a re-entry parking fee after a business journey, the excess cost may be claimed.

17.2 When an employee necessarily incurs a parking fee when visiting a site or other place of work, reasonable car parking fees may be claimed.

17.3 Car parking fees claimed for each day should be recorded on the normal claim form and must be supported by the respective ticket/ receipt (see 23.0 How to Claim and Taxation Implications).

MEALS, OVERNIGHT ACCOMMODATION AND OUT OF POCKET EXPENSES

18.0 Principles in Relation to Meals, Overnight Accommodation and Out of Pocket Expenses

- 18.1 Employees are only eligible to claim reimbursement for expenses incurred in the course of their work where **additional** expenditure has been incurred and where evidence of the expense is provided in an acceptable form such as a valid receipt or other similar document, where appropriate (see Appendix 1 – Procedures Regarding Receipts and Attachments).

(Receipts in respect of out of pocket expenses are not required and an allowance is paid - see 21.0 respectively).

- 18.2 The maximum amount of any claim shall not exceed the amounts set out below

Breakfast	£6.78
Lunch	£9.47
Evening Meal	£13.50
Friends/Family	£27.02
Overnight	£81.06
Out of Pocket (overnight)	£5.00

The rates will be increased in line with the Consumer Prices Index for the 12 months ending February with effect from the following 1st April (with the exception of the Out of Pocket Expenses rate governed by HMRC regulations).

Claims may be made for meals that include soft/non-alcoholic drinks **only** (where the overall cost of the meal does not exceed the amounts as set above). Alcoholic beverages will not be reimbursed under this policy.

(In exceptional circumstances, and where authorisation is given to an individual employee by his/her manager, additional expenditure supported by a receipt may be claimed).

19.0 Meals

- 19.1 In order to qualify for the reimbursement of expenses for meals, an employee must demonstrate:
- that his/her official duties have led to him/her actually and necessarily being absent from their normal place of work for the qualifying periods in 19.2 below, and
 - that this has prevented him/her from following his/her normal meal arrangements or taking reasonable steps so to do. (In this context consideration of what constitutes normal meal arrangements will have regard to the working patterns of the individual, as well as the nature of the meal arrangements they normally make), and

- that, as a result, he/she has necessarily had to incur additional expenditure that they would not otherwise incur.
- 19.2 The qualifying periods referred to in 19.1 above are:
- breakfast - where the employee leaves home before 6.30am
 - lunch - in determining whether claims are reasonable, regard should be had to the practicality of returning to the place where lunch is normally taken during the normal (flexitime) lunch period
 - dinner - where the employee is travelling or working as part of a normal, continuous day, after 8.30pm
 - in the case of a split duty or call-out, the employee will be eligible for:
 - dinner if his/her evening duty comprises at least three hour's work and finished after 8.30pm.
- 19.3 In submitting a claim, the employee is expressly certifying that he/she has satisfied the eligibility criteria set out in 19.1 and 19.2.
- 19.4 If the criteria in 19.1 and 19.2 are not fully satisfied, the employee may be required to justify why and how his/her normal meal arrangements needed to be varied and to explain what additional expenditure he/she had, necessarily, to incur. Receipts will be required to justify the additional expenditure incurred.
- 19.5 When authorising claims, the manager is expressly certifying that the employee has satisfied the criteria.

20.0 Overnight Accommodation

- 20.1 All overnight accommodation, with the exception of stays with friends or family (see 20.2 below), must be booked through local booking systems.
- 20.2 Where an employee stays overnight with friends or relatives and so avoids commercial overnight accommodation costs, a claim may be submitted supported by receipts (e.g. to cover actual costs incurred in connection with the stay) up to the limit of the "Family/ Relatives" rate (See Appendix 3).

21.0 Out of Pocket Expenses

- 21.1 Employees on official duty and who are absent overnight may submit a claim for the Out of Pocket allowance for each night of absence (to cover the cost of telephone calls, newspapers etc.).

ENTERTAINMENT

22.0 Entertainment

- 22.1 Heads of Departments, their deputies and other appropriate employees who entertain members, officials etc. to meals may claim reimbursements of expenses in respect of him/herself and his/her guests, on production of receipts, up to a maximum rate as previously approved by his/her Line Manager.

HOW TO CLAIM AND TAXATION IMPLICATIONS

23.0 How to Claim and Taxation implications

- 23.1 Monthly claims for all business travel allowances and expenses should be submitted promptly each calendar month. Excessive delay in submitting claims may result in payment being refused, or delayed pending further investigation. No matter how small the amount of miles claimed, a form for each calendar month should be submitted.
- 23.3 Employees should be aware that taxation impacts upon some payments for business travel expenses, and failure to comply may have tax, interest and penalty implications for both WeST and an individual employee.

Entries on the Travel Claim Form (see Appendix 4) should be made in the correct columns according to the type of journey.

It is extremely important that employees obtain valid VAT receipts whenever VAT is included in the payment as this saves the Trust money. Employees must ensure that VAT receipts are obtained before making travel claims in order to maximise the VAT recovered by the Trust. This applies to both paper and electronic claims.

For further information on VAT receipts please contact Jamie Vincent, Finance Officer. Email jvincent@ivybridge.devon.sch.uk

APPENDIX 1 - PROCEDURES REGARDING RECEIPTS AND ATTACHMENTS

Fuel receipts

Why you are required to keep your VAT receipts for all mileage claimed?

A VAT receipt, in respect of fuel purchases for business journeys, must be held to support VAT recovery from the fuel element of mileage claims.

Without a VAT receipt, the Trust is not able to recover VAT under UK VAT law.

These have to be retained by the individual for a minimum of 2 years. Failure to do so could incur personal tax liability or costs to your funding budget. When you leave WeST's employment, these should be passed to your budget manager or line manager for retention.

Guidance:

1. VAT receipts must be requested from petrol stations which will record the supplier's VAT registration number, name of the company and date.
2. Receipts should, as a minimum, show sufficient fuel purchased to cover the business miles being claimed. HM Revenue and Customs (HMRC) acknowledge that not all VAT receipts will match the date that the fuel was used and that receipts may cover more than one claim period. For example, if you already have fuel in your car on the day that you do some business miles then your VAT receipt will show the date that you next needed to put fuel in your car and must be retained.
3. No account needs to be taken of private miles when determining whether fuel quantities on a receipt adequately cover the business miles being claimed. HMRC are only concerned that VAT receipts fully support business miles claimed irrespective of any private miles.
4. For claimants with one employment simply keeping all of the VAT receipts for fuel purchases and using them to support mileage claims will be more than sufficient to meet requirements.
5. For claimants with more than one employment it will be necessary to ensure that sufficient fuel receipts are provided to each employer to cover a year's mileage reimbursement. This can be best achieved by dividing receipts between the employments throughout the course of the year appropriate to the miles claimed from each employer.
6. HMRC requires receipts to show fuel purchases in advance of the miles claimed. You may find it helpful to keep an envelope in their car and automatically put the VAT receipts in it for future claim purposes. The most recent receipt can then be used to support mileage claims.
7. Photocopies of receipts or cross referencing receipts to other employments are not acceptable evidence to support VAT recovery.
8. HMRC have agreed a pragmatic approach to calculating how many miles a fuel receipt will support which is that fuel consumption can be based on 8 miles to the litre (36 miles to

the gallon). Therefore a receipt for 32 litres of fuel will cover up to 256 business miles. However, existing receipts in support of claims should be updated with more recent ones as they become available.

EXPENSES THAT REQUIRE A VAT RECEIPT	EXPENSES THAT DO NOT REQUIRE A VAT RECEIPT
ACCOMMODATION (NOT FRIENDS AND FAMILY) CAR PARKING OFF STREET EQUIPMENT HEALTH AND SAFETY EXPENSES HIRE CAR FUEL MEALS (BREAKFAST, LUNCH, TEA AND EVENING MEAL) STATIONERY AND OFFICE SUPPLIES SUNDRY EXPENSES INCLUDING HOSPITALITY TELEPHONE BUSINESS CALLS TRAINING COURSES	BOOKS CAR PARKING ON STREET FOOD PROVISIONS FOREIGN TRAVEL FRIENDS AND FAMILY ACCOMMODATION MEDICAL AND SPECTACLE EXPENSES OUT OF POCKET ALLOWANCE POSTAGE STAMPS TELEPHONE LINE RENTAL TRAVEL FARES AND BRIDGE TOLLS

APPENDIX 2 – RATES – BUSINESS JOURNEY ALLOWANCES (E.G. MILEAGE ALLOWANCES)

Travel claim rates

From 1 April 2011 there has been no distinction between general business mileage, training mileage or 'out of county' mileage. The latter two have, therefore, been removed and standard business mileage should be claimed for all unless different rates have been agreed locally.

Mileage claims should be submitted using the Travel Claim Form – see Appendix 4.

Cars	451-999cc	1000cc and over
First 10,000 miles	45.0p	45.0p
Over 10,000 miles	25.0p	25.0p
Passenger Miles		
All Mileage	1.0p	

Motorcycles	Up to 49cc	50-149cc	150-249cc	Over 250cc
All mileage	24.0p	24.0p	24.0p	24.0p
Bicycles				
All Mileage	20.0p			

APPENDIX 3 – RATES – MEALS, OVERNIGHT ACCOMMODATION AND OUT OF POCKET EXPENSES

Breakfast	£6.78
Lunch	£9.47
Evening Meal	£13.50
Friends/Family	£27.02
Overnight	£81.06
Out of Pocket (overnight)	£5.00

APPENDIX 4 – TRAVEL CLAIM FORM

Westcountry Schools Trust

TRAVEL, SUBSISTENCE AND OTHER BENEFIT CLAIM FORM



WESTCOUNTRY
SCHOOLS TRUST

SECTION 1 – To be completed in all cases.

Pay Reference:							Certification by Claimant I certify that I was actually and necessarily absent from my normal place of duty during this time for which my subsistence allowance is claimed and that as a result of my absence I incurred additional expenditure that I would not otherwise have had to incur. The particulars of my journey are as stated. My claim is in accordance with the Westcountry Schools Trust Business Travel Policy. /...../...../..... (Signature of Claimant) (Date)	Confirmation of coding and associated calculations by Departmental Admin. /...../..... (Signature of Admin Staff) (Date)
Surname:						Inits:		
Home Address:							
Postcode:						Authorisation by Certifying Officer To the best of my knowledge and belief, the certificate of the claimant is correct and the journeys and subsistence were necessarily incurred with due regard for economy. /...../..... (Signature of Authorised Officer) (Date)	
							Department Team Leader:	

SECTION 2 – Complete in all cases.

Claim Period:	m	m	y	y	y	y	MONTH & YEAR (ACTUAL)
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SECTION 3 – If no change or not a new claimant, go to Section 4.

Please complete this section if either this is your first claim or if you are showing a change to the standard details already held on the system, e.g. change of vehicle. **Please complete the form in BLOCK CAPITALS.**

National Insurance Number:										Is this change permanent? (Delete as appropriate)	YES / NO					
If new claim details or new starter, date or starting or effective start date of claim:	d	d	m	m	y	y				If leaver, state effective leaving date:	d	d	m	m	y	y
Vehicle c.c. (do not round) e.g. 1198cc not 1200cc										Vehicle registration number:						

* A new claim form is required for each vehicle type or change of vehicle each month.

SECTION 4 – Mileage claim details. Complete as required. Hyphens must be used in Analysis Code where appropriate.

Miles claimed	Analysis code to be used by FINANCE																											

SECTION 5 – Expenditure claim details. Complete as required. Hyphens must be used in Analysis Codes where appropriate

Expenditure code (see published table)	Analysis code to be used by FINANCE																Value of claim Line/Nett amount		VAT Value	
																	£	P	£	P

When complete, please forward this claim to your own Admin Section for completion. They, in turn, will send the form to the Finance Office, Peverall Building.
All enquiries should be addressed to your own Admin Section (internally)

TOTAL: **CODE:** **COST:** **CENTRE:**

Put in the meal that you are claiming e.g. Lunch, Dinner, etc. Admin will consolidate and carry forward to the front of the form.

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APPENDIX 5 – TRAVEL GUIDANCE [CYCLING, WALKING OR RUNNING TO WORK]

Cycling

When choosing to cycle, please take note of the following:

- Wear a cycle helmet for your own safety. Make sure the helmet fits properly and is in good condition.
- Wear light, bright or reflective clothing to increase your visibility on the road. Make sure that you have suitable lights on your bike if you are travelling in dark conditions.
- You can claim 20p per mile for all your business trips by bike. Enter your claims through your local booking system.
- Check that your bike is in a safe and roadworthy condition before use. Check your tyres are pumped up, the brakes work and your wheels and seat post are on securely.
- If you are not a confident cyclist, or feel that you could 'buddy up' with a colleague who does cycle to help you get started.
- Make sure you pick a route that suits you, for example, traffic-free. To help plan your route, you can access maps and journey planners.
- You must follow the Highway Code. When using shared-use paths, please consider other users – be courteous, give space, use your bell and travel at a sensible speed. While representing Westcountry Schools Trust, please set a good example.

Walking to work

Why walk?

According to health professionals we should walk 10,000 steps a day to benefit our health. Why not invest in a cheap pedometer and start counting?

Regular walking is a good cardiovascular workout, burns calories and reduces the risk of heart disease, type 2 diabetes, stroke, asthma and some cancers.

If you live too far away to walk all of the way you could combine public transport with walking. Or, consider parking a mile away and walking the rest of the way. You might be surprised how a little extra exercise can invigorate you for the day.

Top tips

Plan your route. You don't have to walk the same route that you would normally drive. You will probably find quieter side streets and paths more pleasant. Use an online journey planner to find the quickest, quietest and flattest route.

Estimate your walking time first so that you are not late for work. Plan to walk a mile in 20 minutes or a kilometre in 12 minutes. Allow slightly longer if you have to cross many streets with traffic light crossings. Time yourself on the first couple of days to get a more accurate idea of your walking pace.

Shoes and clothing:

- Wear comfortable shoes like trainers. You can always carry a pair of smarter shoes or leave a pair at work.
- Wear clothing that doesn't restrict your leg movement. Pencil skirts might not be such a good idea!
- Be prepared for the great British weather by wearing layers and carrying a telescopic umbrella. Waterproof clothing is useful when it really pours down, but studies have found that on average it only rains eight times a year during morning or afternoon rush hour. Check the weather forecast before you go.
- Light-coloured clothing, particularly during the winter months, will help to make you more visible to others.

Carrying stuff. Consider switching to a back pack rather than carrying a briefcase or heavy bag. This will help prevent back ache and be better for your posture.

Staying fresh. If you are worried that you'll get too hot and bothered give yourself a few minutes to cool down and dry off when you arrive.

Tips for staying fresh:

- Drink plenty of water
- Change into a fresh shirt
- Consider taking a bus or train to work and then walking home instead

Run to work

For those who fancy more of a challenge, why not try running to work instead?

Running is the perfect way to get active – it's free and you can start right outside your door! You can do it as little or as often as you like and fit it around your busy schedule.

The number of people choosing to run to or from work as an alternative mode of transport has nearly tripled in the last two years. If you want to try running to work, read our tips to get started:

Couch to 5k

If you need a base level of fitness before you try to run your commute, try the Couch to 5k running plan – developed to help absolute beginners get into running. Couch to 5k works because it starts with a mix of running and walking, to gradually build up your fitness and stamina.

Where to run

How far you go depends on your level of fitness. When you are just starting out, it is advisable not to try to run further than you could walk.

The route you run may not be the same as the route you would drive or even cycle. It may not always be the shortest route, but perhaps the least hilly or the one with the best views. You should also take into account additional considerations such as the surface underfoot.

Use a running journey planner like Walk Jog Run to map your journey to work and find out the time, distance, elevation and calories burned. It is a good idea to practice the route in

advance and leave plenty of time to arrive, including time to run or walk at a lighter pace towards the end, so you start to cool down.

When to run

You might not run both ways. Taking public transport to work and then running back home means that no shower is required at work. You could bring in clothes for the week on Monday in preparation for running to work the rest of the week.

What to take

Some people don't like running with a pack, in which case a bum bag for essentials like keys and wallet is a great alternative. An airflow backpack will be preferable to avoid getting too hot. A hip belt will also help to keep the backpack in place.

What to wear

You don't need to wear head-to-toe fitness gear, but it will be lighter and more practical. Look for wicking fabrics (which transfer moisture away from your skin) and outer layers with vents. An outer layer which can be packed down into its own pocket is useful if you get too hot and want to remove it.

A good pair of running shoes will help you to avoid injuries. Make sure you have a head torch and reflective clothing if you are running after dark.

Hygiene

Take public transport to and run back home from work – no shower at work required

Walk for the last 1km to start to cool down before you arrive at work

Use a basin for a flannel wash

Ask at a nearby gym whether you could pay to use their shower. Some gyms have shower only memberships

Use dry shower products or wet wipes

Running for leisure

Want to commit to running regularly but need that extra drive? Joining a running club is the perfect way to keep motivated.

Most clubs have running groups for different levels, including beginners. Clubs are also a great way to find running partners to run with outside of club sessions and socialise with. Run Together is the national body for running. Use their website to find a local running group or route.

Park Run is a free timed 5km running event that takes place every Saturday morning in countries all over the world. Register once, then turn up and take part wherever you want, whenever you want.

BUSINESS TRAVEL CHECKLIST

APPENDIX 6 – BUSINESS TRAVEL CHECKLIST

Employee Name					Employment Start Date				Evidence Checked by	
Has the employee checked that their car is in a roadworthy condition?	Tyres	Wipers	Lights	Mirrors	Brakes	Fluid Leak	Horn	Oil/ Water Level	Dashboard lights	Body Security
									Date Evidence Checked:	
Does the employee have breakdown cover?					Yes / No					
Does the employee have a valid MOT certificate for the vehicle in use?					Yes / No					
Has the employee ensured that the vehicle in use is taxed?					Yes / No					
Does the employee have a valid Driving License?					Yes / No					
Does the employee have the appropriate 'business-use' car insurance?					Yes / No					

I can confirm that I have **read and understood** the Corporate Business Travel (Allowances and Expenses) and Procedures Policy as well as the Drivers Handbook.

Claimant Signature: _____ Print Name: _____ Date: _____

Line Manager Signature: _____ Print Name: _____ Date: _____

Policy History

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Policy Date	Summary of change	Contact	Version/ Implementation Date	Review Date
	This reformatted policy and procedures replaces the Corporate Travel and Subsistence Allowances Policy (version 27.6.2007).	HR P&S	8 Apr 2011	
	<p>Clause 14.4.5 paragraph deleted stating that first class rail travel will be granted to employees graded H (or equivalent) and above, and to other employees necessarily accompanying them or accompanying a Council Member, and that Chief Officers and their Deputies may also authorise first class rail travel to employees of any grade when they consider it justified by the circumstances.</p> <p>Clause 20.2 Qualifying time for breakfast allowance amended to where the employee leaves home before 6.30am (previously 7.30am). Tea allowance deleted (and respective wording at end of clause deleted).</p> <p>Clause 20.6 re employees who are above the salary limit for overtime claiming for the reimbursement of tea or dinner expenses when working without a break after regular hours at their normal place of work deleted.</p> <p>Above amendments agreed with recognised trade unions.</p> <p>Clause 14.4.10 "Directorate" amended to read "Service" (x 2) to reflect new organisational structure.</p>	HR P&S	30 Aug 2011	
	Update to VAT section 25	HR ONE	9 July 2014	

	<p>Clause 16.3.1 change to contact details for HMRC compliance advice</p> <p>Clause 17.1 removal of reference to leased cars</p> <p>Clause 25.2 change to reference form TRAVEXP1 instead of PUMA1</p> <p>Clause 25.3 change to include manager approval for electronic claims and change of reference to form TRAVEXP1</p> <p>Appendix 1 removal of appendix relating to Car Loans</p> <p>Appendix 2 updated to Appendix 1 and change of reference to form TRAVEXP1. Removal of Car Loans</p>	HR ONE	1 November 2014	
	Updated links to various travel pages on the Source.	HR ONE	23 September 2015	
July 2016	Updated sections 5.1, 6.1, 25.2 and 25.3. Self Service link added to Appendix 1.	HR Direct	29.07.16	
February 2017	<p>Update to 5.1 to emphasise and clarify the managers responsibility to advise employees on the requirements to keep VAT and the implications of not doing so.</p> <p>Update of 6.1 to emphasise and clarify further the employee responsibilities for retaining VAT receipts and the impact on not doing so.</p>	HR Direct	08.02.17	
November 2017	<p>Paragraph 10.3 added in line with DCC's Flexitime Policy.</p> <p>Paragraph 16.3.1 – reference to Intermediate Homeworker deleted, in line with revised Formal Homeworking Policy.</p>	HR ONE	20.11.2017	
February	Addition to Paragraph 14.4.8	HR Direct	22.02.2018	

2018	regarding the hire car driver being responsible for any charges that occur during the hire period, including any administration charges.			
September 2018	Updated in line with MAT details. Essential and casual user classification removed as not applied within the Trust.	WeST – HR	06.12.18	