



**SOUTH LANARKSHIRE
Leisure & Culture**

Travel and Subsistence Policy

November 2011

1. Introduction

The aim of the policy is to provide employees and managers with arrangements for:

- travel required to carry out Trust business
- reimbursement for additional receipted expenditure reasonably incurred whilst undertaking Trust business

2. Travel

There are occasions when employees are required to consider travel to undertake their duties. The Trust is committed to providing employees with travel options which are efficient, effective and sustainable. Options include:

- consideration of alternatives
- public transport,
- access Fleet arrangements, including pool cars,
- use of own vehicle.

2.1. Method of Travel

South Lanarkshire Council's Carbon Management Plan outlines that smarter journey planning and effective travel options will contribute to an overall reduction in carbon emissions, and the Trust also adopts the principles of this plan. Where business travel is required the most appropriate travel method should be accessed. In line with best value principles, the use of public transport or shared car arrangements should be encouraged whenever possible, depending on the requirements of the service being provided. Unnecessary travel should be reduced and other methods employed such as using the telephone to discuss business rather than a face to face meeting.

Managers should discuss travel arrangements with employees in advance to ensure the most effective and efficient travel option is accessed. Method and route should be based on the pool car rules of access (Appendix A) and agreed in advance. Managers are asked to consider the type of journey employees will be required to undertake including the distance, frequency and nature (e.g. emergency call out or planned response).

2.1.1. Public Transport

Employees can access public transport for business travel and can reclaim any additional expenditure incurred.

2.1.2. Pool Car Scheme

The Trust operates a Pool Car Scheme providing vehicles for employees to access for business travel. Where travel by car is required, employees should consider access to a pool car in line with the pool car rules of access (attached as Appendix A).

Pool cars are provided for business use only and personal use of pool cars is strictly prohibited.

Employees who are required to drive as part of their role must submit their driving license for inspection on an annual basis. Employees must also be aware of their responsibilities in line with SLC's Occupational Road Risk Policy, which the Trust also adopts under our Service Level Agreement with SLC.

2.1.3. Use of own vehicle

Employees are only permitted to use their own vehicle for business use and claim mileage at the rates detailed in Appendix B, in line with the pool car rules of access. In addition, as with all business journey arrangements, use of own vehicle should be discussed and agreed in advance with the line manager.

Employees must submit their driving license, insurance documents and MOT certificate on an annual basis if they intend to claim business mileage. (Insurance documentation must include cover for business travel.)

2.1.4. Arrangements for Disabled Employees

Disabled employees where practicable can access the arrangements for business travel detailed in 2.1.1 – 2.1.3. In some cases it may not be reasonable for disabled employees to access public transport or the pool car scheme. Specific arrangements for these employees are:

- Employees who require an adapted vehicle for travel should outline their requirements and the Diversity Liaison Officer will liaise on their behalf to establish if an adapted vehicle can be provided as part of the pool car scheme. Where an adapted vehicle cannot be provided the employee can use their own vehicle, claim business mileage for the journey and will not be required to provide justification in terms of pool car rules. Arrangements for mileage claims are detailed under section 4, Expenses.
- Employees who are blue badge holders and can access the pool car scheme will need to discuss their parking arrangements in advance to ensure they can use their blue badge if required when out on Trust business. Line managers should consider reasonable adjustments such as reserved parking at locations. Advice on reasonable adjustments is available from the Diversity Liaison Officer, HR.
- Employees who require any other adjustments in relation to pool car access should discuss their requirements with HR.

3.0 Subsistence

Subsistence paid will be subject to receipted expenses based on actual expenditure incurred up to the maximum allowances as outlined in Appendix C. These will be payable, subject to authorisation and the conditions set out below;

- those who are prevented by their official duties from taking a meal at their home, normal working location or place where they normally take their meals, or those who are required to be absent overnight on business and, as a result incur additional expenditure;
- any employee making a claim must complete the appropriate form and provide relevant receipts;
- expenses for meals will be paid only when:-
 - It was not reasonably practicable for the employee to travel to his/her home, normal working location or place where a meal is normally taken and/or;
 - It was not reasonably practicable for the employee to take a meal at a place where meal facilities are made available by the Trust and/or;
 - It was necessary for the employee to take a meal at that time away from his/her home, normal working location, or place where a meal is normally taken and
 - The employee incurred additional expenditure in excess of the norm.

3.1. Overnight stays

Where an employee is required to be absent overnight the management should arrange via the Trust's travel agent for the Trust to be invoiced directly for costs in respect of board and lodgings, e.g. bed, breakfast and evening meal.

Alternatively, if an employee is required to make their own arrangements they will be

entitled to reimbursement of actual receipted expenses incurred up to the maximum detailed in Appendix C. This allowance includes all costs during a 24-hour period including breakfast, lunch, tea and evening meal.

In exceptional circumstances these allowances may be exceeded but this must be authorised in advance by the General Manager.

3.2. Overseas visits

For travel overseas on a journey authorised under paragraph 3.1, excess expenses reasonably incurred will be reimbursed.

3.3. Application to site/peripatetic employees/secondments/temporary transfers:

3.3.1. Employees transferred to alternative location (by Management direction).

- Normal working location remains unchanged;
- If catering facilities are available on site (e.g. cooker, kettle, water) then no lunch expenses are payable;
- If no catering facilities are available and additional expenditure above normal is incurred, then lunch expenses are payable;
- Where subsistence is payable in terms of the above it will be for a period of up to 4 weeks, as where transfer to alternative location is greater than 4 weeks the alternative location becomes normal work location.

3.3.2. Employees who undertake occasional duties (e.g. site visits, surveys, attendance at meetings etc.)

- Normal working location remains unchanged;
- If an employee is unable to economically travel back to his/her home, normal working location or establishment where canteen facilities exist, then if additional expenses above the norm are incurred, lunch expenses are payable.

Where an employee is visiting Trust locations, prior arrangements should be made for access to lunch facilities.

4.0. **Expenses**

The principle for reimbursement of expenses to employees is that only receipted expenses in addition to normal expense incurred will be refunded.

4.1 Authorisation

Employees and Management are expected to adopt a reasonable and responsible attitude when submitting claims for travel and subsistence expenses. Authorisation shall be obtained from the appropriate manager. Overseas visits must be authorised by the General Manager. Confirmation of such authorisation must be sought from the General Manager giving as much notice as reasonably possible prior to the journey being undertaken.

4.2 Processing of claims

All claims under this Scheme must be made through People Connect or on the appropriate form.

The appropriate manager must certify that the journeys were authorised, the expenditure was actually and necessarily incurred in accordance with the provisions of this Scheme and that the claim is approved for payment. Thereafter the claims will be passed for payment in accordance with the approved arrangements as determined by the Trust.

All information requested through People Connect or on the claim form must be fully completed and all appropriate receipts sent to the relevant approver. Failure to complete all

requested information will result in the claim being rejected.

All claims must be submitted timeously. Claims must be submitted within 3 months of the journey and within the current financial year. Any claim not submitted within the 3 month timescale will not be processed.

4.3. Definition of normal working location

The normal working location is where an employee is contracted to work from. This is where claims for travel and subsistence will be based from.

4.4. Definition of home

For the purpose of this Scheme, "Home" means the employee's usual place of residence or place of residence for the time being.

4.5. Definition of alternative location

Any location other than the normal working location.

4.6. Exceptional circumstances

Individual cases of special circumstance, which may be difficult to deal with under any part of the scheme should be referred to the Company Secretary for consideration.

4.8. Mileage claims

Employees claiming mileage are required to provide justification in line with the pool car rules of access. The justification should be detailed as part of the mileage claim and provide detail as to why the employee has accessed their own vehicle for the journey.

Employees claiming mileage should refer to the standard mileage on the Corporate I: Drive under Staffing, and mileage rates in Appendix B. Standard mileages are calculated to the nearest decimal point using the AA route planner system. Employees should also refer to the mileage matrix, which details mileages for standard journeys undertaken within the Trust, which is calculated using the AA route planner system. Business mileage will be paid at the current inland revenue rate in Appendix B.

Employees authorised by the Trust to use their own motor cycle or cycle for official business shall be entitled to allowances subject to the rates in Appendix B.

4.9. Journeys outwith South Lanarkshire area

For journeys outwith the authority area that are of significant distance, it is normally expected that public transport will be used. In cases where it is not feasible, it can be justified that public transport cannot be used and employees opt to use their own vehicle to travel, payment will be at the lower mileage rate.

5.0 Additional Journeys

An employee who is required to undertake a journey in addition to their normal home to work mileage, should make arrangements to access a pool car for this purpose where possible. However, in line with the pool car rules of access employees may claim any expenditure incurred in travelling from home to the normal working location or alternative location as the case may be, and in returning home if the return journey is made outwith normal working hours.

For example home to normal working location and return is 10 miles, home to alternative location and return is 20 miles. In this situation an excess mileage of 10 miles may be claimed.

Alternatively home to normal working location and return is 10 miles, home to alternative location and return is 8 miles. In this situation excess mileage may not be claimed as none was actually incurred.

5.3. Application to site/peripatetic employees/secondments/temporary transfers:

5.3.1 Employees transferred to alternative location

- Normal working location remains unchanged;
- Excess mileage payable if distance from home to alternative location is greater than distance of home to normal working location only if use of a pool car is not appropriate in line with the pool car rules of access
- Appropriate business mileage payable for use of car on official duties whilst at different locations or whilst on site, only in line with the pool car rules of access.

For example if travel from home to Normal Work Location was 20 miles and travel to Alternative Location was 30 miles, only 10 miles could be claimed.

For transfers longer than 4 weeks the Excess Travel Scheme will apply.

5.4. Other conditions

All receipted parking fees, ferry dues and bridge tolls will be reimbursed in respect of authorised business travel.

1. Journey Planning

Employees should adopt a smart approach to journey planning in terms of diary management and journey planning. Employees should discuss their travel requirements with their manager in the first instance and consider all options including:

- Is the journey necessary – can the business be carried out over the telephone or similar, avoiding the requirement for travel
- Is public transport more efficient and effective? Public transport links can be accessed by www.spt.co.uk
- Can the journey be shared with another employee travelling to the same location?
- Has the journey been planned smartly – that is a number of visits combined into one trip; diaries managed to incorporate shared journeys where possible
- Managers and employees should work together to reduce the requirement for business travel

2. Pool Car Access

Where business travel is necessary and public transport is not considered a practical option, a pool car must be considered in the first instance.

- For planned journeys pool cars should be booked at least 48hrs in advance
- For journeys where it is not possible to provide 48hrs notice for booking, employees should still request a pool car for their journey
- Where it is not possible to provide a pool car this request will be logged along with the reason the team are unable to supply a pool car.

3. Best Value

Where it can be demonstrated that it is best value for an employee to access their own car for the journey, the employee will be able to do so and claim mileage.

- Managers must demonstrate that an employee accessing their own vehicle is cheaper than accessing a pool car. Examples are given below at the end of this report.

A pragmatic approach should be taken for business journeys to and from work and there are options in relation to locations to access a pool car, this does not always have to be the base location.

4. Emergency Arrangements

- There may be occasions when employees have to respond in an emergency and a pool car should be accessed for the journey where appropriate.
- It is recognised it may not always be possible to access a pool car in an emergency. Managers should consider the requirements for out of hours or emergency access and agree the appropriate travel arrangements with employees.
- If regular out of hours or emergency access can not be arranged in advance and employees regularly use their own vehicle, this should be logged. This allows the team to identify trends and put arrangements in place for future requirements.
- If employees use their own vehicle for emergency call out work managers should be able to demonstrate why this option was an efficient and effective method for the service, as outlined above.
- Employees must seek prior authorisation from their manager to have the option to use their own vehicle.

5. Disabled Users

- Employees who require an adapted vehicle should discuss their requirements with the Diversity Liaison Officer, HR.
- Where we are unable to provide suitable vehicle with adaptations these employees will be able to access their own vehicle and claim business mileage.

General Points to Note

Pool car locations.

Ideally a pool car should be available within a reasonable distance of employee work locations. Where a pool car is not available in a nearby location the above rules should be applied to demonstrate best value and a pragmatic approach to business travel.

Employees should access pool cars from the nearest location to their journey starting point. This may not always be their base location, for example when accessing a pool car on the way to or from work.



Mileage rates

Mileage rates will be paid at Inland Revenue rates and will not be subject to the deduction of income tax and National Insurance (based on the present Inland Revenue rules). Rates will be revised in line with Inland Revenue reviews. Current rates are;

Car Per mile – first 10,000 miles	45p
Car Per mile – after 10,000 miles	25p
Passenger Rate	5p
Motor Cycle Per Mile	24p
Cycle Allowance	20p
Lower Mileage Rate	20p



SOUTH LANARKSHIRE
Leisure & Culture

**South Lanarkshire Leisure and Culture
Subsistence expenses**

C1. Meal allowances

Breakfast	£5.08
Lunch	£6.99
Tea	£2.75
Evening Meal	£8.70

C2. Overnight provision

Where an overnight stay is necessary, actual expenditure incurred up to £82.53 will be reimbursed.

For necessary overnight stay in London, or for the purposes of attendance at an annual conference the rate is £94.11

For the purpose of this paragraph, London means the city of London and the London Boroughs of Camden, Greenwich, Hackney, Hammersmith and Fulham, Islington, Kensington and Chelsea, Lambeth, Lewisham, Southwark, Tower Hamlets, Wandsworth and Westminster.

C4. Payment of expenses

Payment will be made for authorised receipted expenses actually incurred. For example expenses may not be claimed for meals where they are provided free as part of hospitality or conference provision.