



Scottish Universities Sport Business Travel Policy

Introduction

- Following an internal audit review of staff travel expenditure, it was decided that greater economy could be achieved, and more effective control could be exercised over travel expenditure. To enable this to happen it was necessary to review SUS' travel guidelines, as these would contain the rules that the organisation would follow.
- The opportunity was taken to reorganise SUS' travel guidance into the form of a brief operational policy, together with detailed guidance in associated documents. The revised documents follow below.
- The rules will be reviewed annually and may be revised in the light of experience and/or new circumstances.

1. Policy

1.1. The purpose of this policy is to define and explain the types of expenditure which are allowable that may be incurred by SUS employees, committee members and volunteers as a result of SUS business.

1.2. SUS business is defined as duties which an employee or officer of the organisation must or is required to perform as part of their role in SUS, and are solely in the interest of the business.

1.3. An employee should agree with his/her line manager the general nature and level of expenditure to be incurred prior to the expenses being incurred. Failure to do so may result in reimbursement being withheld.

1.4. All expense claims must be completed using the approved SUS expense forms and be authorised by the responsible member of SUS staff. Receipts will be required to support all claims. Failure to provide receipts may result in non reimbursement. Employees/volunteers are expected to give accurate details of the journeys, describe the purpose and identify points of origin and destination. Authorising SUS staff are not permitted to sign expense claims for individuals that include expenses for themselves.

1.5. Claims for reimbursement under these guidelines should generally be made monthly, but no later than three months after the expenses are incurred.

2. Scope

2.1. This policy applies to all SUS employees, committee members and volunteers who incur expenses as a result of SUS Business only. It does not include travel between a staff member's home (permanent or temporary) and the employee's normal place of work. It also does not cover expenditure incurred as a result of any other business or training undertaken for the personal development of the individual.



3. Principles

3.1. SUS aims to be green and where possible the use of public and environmental travel will be encouraged, including the use of public transport and rail travel as opposed to car or air travel.

3.2. Employees must ensure that they obtain value for money for all expenditure and obtain every possible benefit from discounted arrangements. Using the internet for booking travel is often the most cost-effective option.

3.3. SUS also has an arrangement with a local Travel Management Service: Traveleads. Rail and air travel, both domestic and foreign, can be arranged through this service and requests to use Traveleads should be passed to the SUS Administration Assistant. Use of other suppliers and travel agents is not advised, and may result in expenses not being funded by SUS.

3.6. SUS has adopted the rates approved by HM Revenues & Customs (HMRC) for business mileage claims. This will be reviewed either during an annual review or following notification of changes from the HMRC.

3.7. SUS staff members approving all travel and subsistence claims must be able to clearly demonstrate that the expenditure incurred was necessary, reasonable and in the interest of the organisation. Additionally, a full audit trail must be maintained, which may be subject to review and future audits.

3.8. Reimbursement of expenses will ordinarily be made within 15 working days, upon receipt in Finance of a complete and properly authorised travel and subsistence claim form. Payments will be made by cheque to the claimant. Delays will occur where a claim form is incomplete or requires further authorisation.

4. Monitoring and assurance of this Policy

4.1. The SUS Administration Assistant will ensure that expenditure coded to travel and subsistence expenses in the general ledger was incurred in line with this policy.

4.2. In addition, the SUS Internal Auditor will periodically undertake a review of travel and subsistence expenses with a view to providing assurance this policy is being adhered to.

5. Supporting documents

5.1. The associated documents will not form part of the policy but will follow below as appendices:

Appendix 1: Reimbursement of Travelling Expenses on Official Journeys using Public Service Transport

Appendix 2: Reimbursement of Travelling Expenses by Car including mileage allowances and categories of car users

Appendix 3: Guidance for Car Hire Agreement.

Appendix 1

1. REIMBURSEMENT OF TRAVELLING EXPENSES ON OFFICIAL JOURNEYS USING PUBLIC SERVICE TRANSPORT

1.1. Payment will only be made in respect of expenses actually and necessarily incurred by an employee travelling on business approved by SUS. The sum paid shall not exceed the amount spent by the employee.

1.2. The cost of journeys or parts of journeys between home and SUS premises will not be paid. When an employee travels direct from home to the place visited, or vice versa, the actual cost of the journey may be reimbursed.

1.3. Taxi or cab fares and any gratuity (up to 10% of the fare) shall be payable only in cases of extreme urgency or in other cases in which transport is reasonably required and an adequate public service is not available. The circumstances where the use of taxis is required must be justified on the claim form. Where these conditions are not fulfilled employees using a taxi shall be entitled to claim the sum they would have paid had they been travelling by public service vehicle.

1.4. Employees/volunteers travelling by train on official business are required to pre book travel as far in advance as possible and must take advantage of any low cost options that may be available, for example, cheaper “closed” tickets, where their use is consistent with the efficient and economic conduct of the official business.

1.5. Air travel should only be utilised

- where it represents a saving in cost over other forms of travel; and/or
- where it represents a significant saving in time and where the saving of official time is important.

Air travel should be arranged as far in advance as possible either by the member of staff travelling, if booking on-line via the web and paying by debit or credit card, or through the SUS Administration Assistant if using Traveleads. All bookings should normally be economy class.

1.6. First class rail or Business class air travel will be authorised when:

- it is necessary to avoid fares with a financial penalty, such that first class rail travel/business class air travel is the cheapest available ticket and is cheaper than the corresponding economy ticket and relevant penalty combined; or
- the traveller is travelling alone and intends to work on the journey; or
- the traveller has a disability issue and would otherwise suffer discomfort.

1.7. Members of SUS Committees may claim for all travel from their workplace/home to attend meetings at which their presence is required. However where possible it is requested that they claim these back from their own institution.

Appendix 2

1. REIMBURSEMENT OF TRAVELLING EXPENSES BY CAR INCLUDING MILEAGE ALLOWANCES AND CATEGORIES OF CAR USERS

1.1. There are specific mileage allowances and arrangements for those staff regarded as 'regular users' or classified as 'standard car users'.

2. Standard user mileage rates

2.1. The standard user mileage rates (see Table 1 below) apply to those employees/volunteers who are expected to use their own cars on SUS business but who do not meet the criteria for regular user allowances. Although the use of public transport is encouraged wherever possible, this allowance is applicable where the use of public service transport is inappropriate.

3. Regular user allowances

3.1. The mileage rates and the allowance in Table 2 below shall be paid to those staff who are classified by SUS as "Regular Car Users" and to whom SUS has determined that it is not economic to provide a lease or hire car for the journey. Such staff will be those who are normally required by SUS to travel on business by car on a daily/regular basis and, in so doing, travel an average of at least 2500 miles a year.

3.2. A regular car user application must be completed and appropriately authorised for the provision of this allowance.

3.3. If there is a change in the member of staff's duties or if the annual official mileage falls below that on which a regular user classification was based, the continued application to the member of staff of the Regular User agreement shall be reconsidered.

3.4. Regular users must ensure that their vehicles are roadworthy (i.e. have a valid MOT certificate and are correctly serviced) and that they have a valid motor insurance policy that provides adequate cover for the purpose the vehicle is being used for. Compliance with these conditions will be monitored by SUS and users must supply copies of their documentation to the company as and when requested.

4. Passengers

4.1. With the exception of lease or hire car users, where other SUS employees/volunteers are conveyed in the same vehicle on the business of SUS, and their fares by a public service would otherwise be payable, allowances at the rate in Table 3 shall be paid.

5. Other forms of transport

5.1. Allowances for the use of other vehicles and pedal cycles on SUS business are specified in the tables below.

6. Lease Car

6.1. SUS may offer a lease car to employees whom they require to be mobile and where they deem it in the interest of the service to do so. Such interest will be based on the needs of the service delivered and the economic factors relating to the costs of mileage allowances.

6.2. The base vehicle (i.e. the particular size or type of vehicle appropriate to the post or its financial equivalent) will be determined by SUS.

6.3. It is the user's responsibility to ensure that the vehicle is correctly serviced, repaired and maintained in a roadworthy condition through an agent approved by the leasing company. Such costs will be covered within the lease charge to SUS. All petrol for the vehicle should be paid for using a SUS Credit Card.

6.4. Where after joint consideration of the current options, including the alternative means of mobility, SUS decides to withdraw the provision of a lease car to a current user, the employee shall be entitled to the regular user mileage allowances set out in the guidelines, provided the required qualifications are met.

6.5. Any employee offered a SUS car on the service or economic grounds, who refuses that offer, shall be reimbursed at standard user mileage rate.

6.6. Provision of a car under these arrangements will be withdrawn if the vehicle is abused or not appropriately looked after.

7. Hire Car

7.1. Employee journeys in excess of 140 miles per day should normally be undertaken in a hire car, using a car supplied by SUS' contracted car hire company. Guidance on the Car Hire Agreement can be found in Appendix Three.

7.2. For SUS employees all petrol for the vehicle should be paid for using a SUS Credit Card. Where a vehicle is hired by another person on SUS business this cost can be claimed back using the appropriate expense claims forms.

7.3. In some circumstances where the car is delivered to the employee's home the journey on official business may cover part of the employee's normal journey to work. This is unavoidable and acceptable.

7.4. An employee may elect to use his or her own private vehicle instead of a hire car and will be reimbursed at the regular user rate for the miles up to the 140 threshold and the standard user rate thereafter.

7.5. The 140 mile threshold may be varied if exceptional circumstances justify it. For example, employees who are travelling in their own cars on journeys expected to be less than 140 miles and who find that they have to complete additional mileage that could not reasonably have been anticipated will, at the discretion of the SUS Office, be eligible to claim the regular user mileage rate even though the journey exceeds 140 miles.



7.6. Exceptionally an employee may be permitted to use their own vehicle at the regular user rate, for example, has personal circumstances or requirements which dictate the use of their own vehicle. Approval should be sought, in advance, from the SUS Office.

7.7. Provision of a car under these arrangements will be withdrawn if the vehicle is abused or not appropriately looked after.

8. Insurance

8.1. All employees using vehicles on SUS business which are not provided and insured by SUS must ensure that the vehicle is roadworthy, taxed, has a valid MOT certificate (if required) and is insured for use in connection with the business or profession of the driver. All employees may be expected to provide evidence of such, if so requested.

9. Other associated expenses

9.1. Subject to the production of receipts, employees using vehicles on an official journey shall be refunded all reasonable charges for car parking and tolls. Employees/volunteers should take advantage of free parking facilities wherever possible, but where parking costs are necessarily incurred while using a vehicle on official business, SUS will reimburse the actual costs. There will be no reimbursement of parking fines or clamping charges, apart from exceptional (emergency) circumstances where the SUS staff member is satisfied that the penalty was incurred for a valid reason. Other motoring fines or penalties will not be reimbursed in any circumstances.



Appendix 3

1. GUIDANCE FOR CAR HIRE AGREEMENT

1.1. SUS currently has an agreement in place with Enterprise for the hire of vehicles. This agreement allows for vehicle hire at a discounted rate.

2. Hire Procedure

2.1. Any proposed car hire should be authorised by the SUS office in the first instance. Bookings should be made through the local Enterprise branch directly by calling 0131 557 0000 and quoting the SUS account number: 1SA4597.

2.2. Where available small cars should be hired in order to keep the cost low. However where the car is going to be used to transport more than two people a larger vehicle can be considered but approval should be sought, in advance, from the SUS Office.

2.3. On payment of an additional fee vehicles can be dropped off and picked up from a nominated location. SUS will likely pay this cost but prior approval should be clarified with the office.

2.4. On collection of the vehicle drivers will need to provide a copy of their driver's licence. They will also be required to carry out a check on the vehicle, noting any previous damage and the petrol level.

2.5. The vehicle must be returned with the same amount of petrol as when it was dropped off. It is the responsibility of the hirer to make sure this has been completed and to return the vehicle in a timely manner.

2.6 Vehicles hired through Enterprise are insured 3rd party and include a damage waiver with an excess of £500. The hirer will be held responsible for any damage or any penalty offences occurred whilst the vehicle is in their care.

2.7. The cost for hire will be invoiced centrally to SUS.

Table 1: STANDARD CAR USER (all mileage rates are pence per mile)

Vehicle Type	Up to 10,000 business miles per year
Cars & Vans	30p
Motorcycles	15p
Bicycles	20p

Table 2: REGULAR CAR USER

Vehicle Type	Up to 10,000 business miles per year
Cars & Vans	45p
Motorcycles	24p
Bicycles	20p

Table 3: PASSENGER RATE:

- 5p per mile for the first passenger
- 2.5p per mile for each subsequent passenger, up to a maximum of three passengers, per vehicle, per journey.