



The Diocese of Chelmsford

Vine Schools Trust

Excess Travelling Expenses Policy

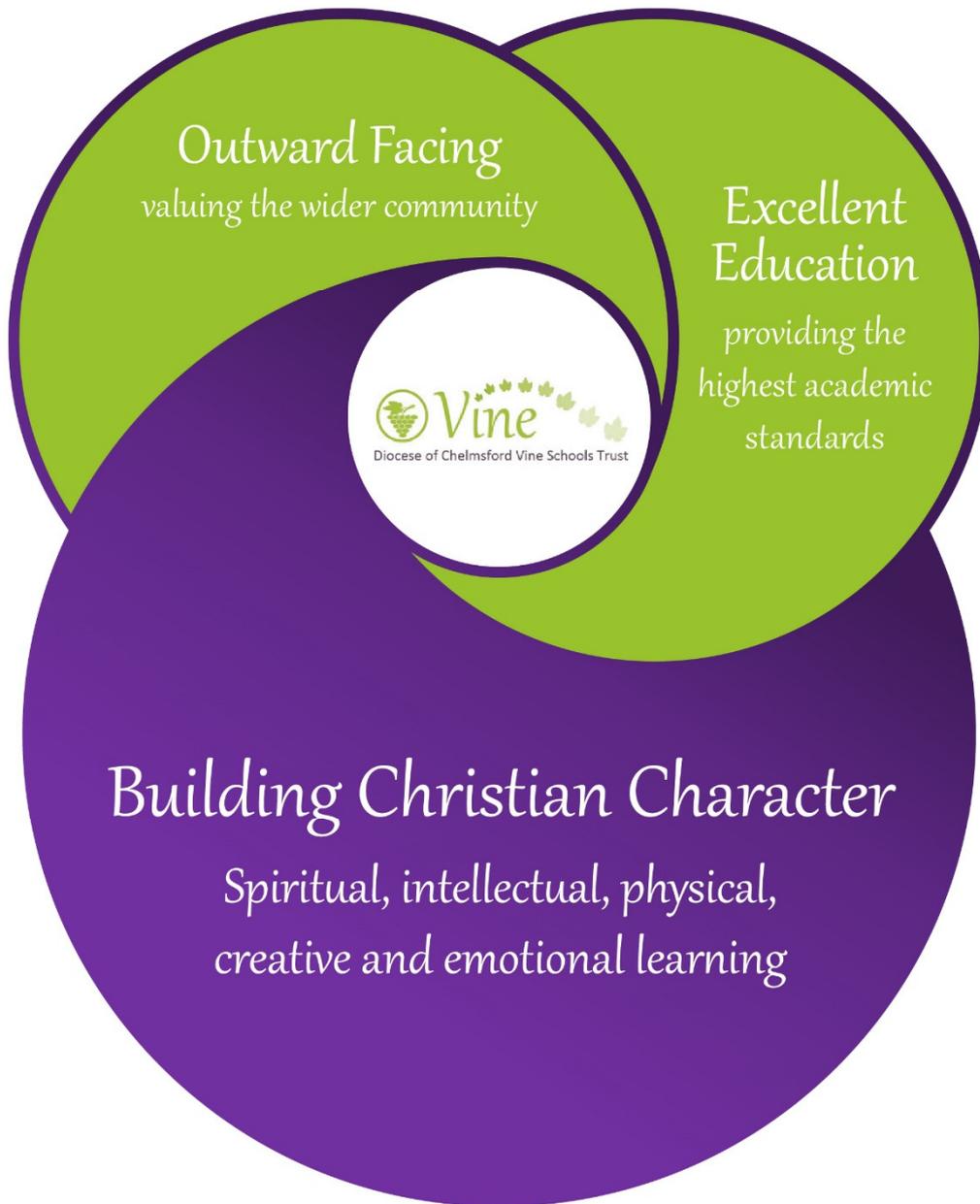
This policy is a mandatory policy for all Vine Academies and must be implemented with no amendments.

The Diocese of Chelmsford Vine Schools Trust	
Approved by:	The Vine Schools Trust
Signature:	Chairman
Date:	

[Name of Academy]	
Approved by:	Local Governing Body/Local Board
Signed (Chair of Local Governing Body/Local Board)	
Date:	

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Our Vision and Values



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1. Introduction

- 1.1 This policy explains The Diocese of Chelmsford Vine Schools Trust's (Vine) approach to reimbursing employees for additional travel expenses in situations where the Vine requires an employee to change their work base.
- 1.2 A separate policy applies to secondments.

2. Principles

- 2.1 Employees are responsible for their usual home to work mileage or fares; this includes where an employee chooses to apply for a new role (i.e. voluntarily, and not triggered by organisational change.)
- 2.2 Where an employee's work base is changed by operational reasons beyond their control, including a transfer by the Vine to a new base, additional mileage is paid for up to 18 months, when claimed in line with this policy.
- 2.3 These arrangements to repay excess travelling costs consist of a locally agreed scheme between the Vine and the recognised trade unions; this agreement was reached through negotiation and became effective from XXXXXXXX.
- 2.4 This arrangement replaces any links to Part 2 of the National Green Book Conditions and to the former Excess Travelling time scheme which was a Regional Joint Council scheme adopted by ECC payable for all employees.
- 2.5 All reimbursements of expenses are subject to tax and National Insurance Contributions.
- 2.6 The Academy/team which originated the change of work base is responsible for the payment of the travelling allowances to the employee.
- 2.7 No compensation payments will apply where a change in work place is less than 5 miles additional travel from the employee's home, or where an employee does not incur travel costs (for example, cycling to work).
- 2.8 There is no compensation for additional time spent travelling.
- 2.9 Where excess travel costs apply, compensation is paid at the vehicle mileage rate (either private car or lease car rate), regardless of the mode of transport – an employee travelling to their new workplace wholly or partly by public transport will claim mileage rates for their journey from home to work, calculated in line with this policy, rather than the cost of any fares. All excess mileage claims are subject to tax and NI) Secondment mileage is covered separately in the Secondment policy and guides.

3. Excess Travelling Expenses

Policy Outline

- 3.1 Assuming the new work place is more than 5 miles further from their home than the original workplace by the most practicable direct route, the employee will be paid compensation based upon the difference between the cost of travelling a) from their home to the new workplace and b) from their home to the original workplace.
- 3.2 Compensation is paid for a period of up to 18 months from the date of transfer to the new work base.
- 3.3 The rate is 25p per mile for private car users. For employees with lease cars their usual lease car rate will apply. (All payments are subject to tax and NI).
- Eligible employees
- 3.4 Employees who are eligible include:
 - 3.4.1 Those whose place of work is changed for operational reasons e.g. an establishment closure;
 - 3.4.2 Those whose place of work is changed because of reorganisation;
 - 3.4.3 Those who are redeployed because of ill-health, disability or redundancy.

Calculation of payments

- 3.5 The formula for payment for a full time employee is as follows:
- 3.5.1 25p per mile for all additional miles above 10 per day (5 miles each way);
 - 3.5.2 calculated at the outset using the current number of working days per year (228 days has been used for the benefit of the examples below) for 4 years;
 - 3.5.3 paid monthly over a period of 18 months.
- 3.6 For part-time employees, the number of working days per year is calculated pro rata.
- 3.7 When the work base is changed but an employee is only required to travel to that base for part of the working week, the number of working days per year is calculated pro rata. For other business travel, mileage can be claimed for any distance travelled in excess of the old base to home mileage.
- 3.8 For employees with lease cars their lease car mileage rate will apply.
- 3.9 Where an employee leaves the employment of the Vine before a payment is due, they forfeit that month's payment.

Example of calculation for employee using their private car

- 3.10 A change of workplace involves a full-time employee travelling a further 8 miles each way (= an additional 16 mile round trip). So:
- 3.10.1 eligible miles for compensation = 6 (i.e. 16 less first 10);
 - 3.10.2 $25p \times 6 =$ daily compensation of £1.50 per day;
 - 3.10.3 $£1.50 \times 228 \times 4 =$ £1368;
 - 3.10.4 $£1368 \div 18 =$ instalments of £76 every month for 18 months, following which payments will cease.

Example of calculation for employee working at a new base part of the week

- 3.11 A change of workplace involves a full-time employee working 2 days a week at a new location travelling a further 8 miles each way (= an additional 16 mile round trip). On the days when they are not required to attend the new work base, business mileage can be claimed in the usual way if driving further than the home to old work base mileage. For the 2 days at the new base:
- 3.11.1 eligible miles for compensation = 6 (i.e. 16 less first 10);
 - 3.11.2 $25p \times 6 =$ daily compensation of £1.50 per day;
 - 3.11.3 $228/5 \times 2 = 91.2$ (number of working days per year)
 - 3.11.4 $£1.50 \times 91.2 \times 4 =$ £547.20;
 - 3.11.5 $£547.20 \div 18 =$ instalments of £30.40 every month for 18 months, following which payments will cease.
 - 3.11.6 After the 18 month payment period, claims for business mileage on the two days traveling to the new base should not be made unless traveling beyond the usual mileage for home to new base journey.
- 3.12 If an employee is required by their manager to attend additional (above the agreed days at the point of re-location) days at the new location these are claimed via the travel expenses claim form, at 25p per mile, using the formula in 3.11.

Application of policy during reorganisations

- 3.13 Employees "job matched" to posts in a different/other location will be entitled to excess travelling allowance.
- 3.14 Employees "job matched" in the same location but who apply for and are appointed to another position in another location are not entitled to excess travelling allowance.
- 3.15 Where an employee applies for and is appointed to a new post at a different location, excess travelling allowances are payable* where management accepts that the employee is under notice of redundancy and their application for the new post was part of the search for alternative employment.
- *This will apply only where the appointment is to a post at the same or a lower band.

Continuation of excess travel allowance payments

- 3.16 Second or subsequent relocations of the same office. If an employee is transferred again during the period where an excess travelling allowance applies, the excess mileage should be re-calculated from the original work place to the new work place and the revised allowance paid for the remaining balance of the original period of 18 months.
- 3.17 Should an employee voluntarily move home whilst receiving an excess travelling allowance, the payment will be adjusted downward if the distance travelled is reduced but will remain unchanged if the distance travelled is greater.
- 3.18 Where an employee moves home as a result of a reorganisation and change of work base, there is no automatic entitlement to any payments under the **Vine's Relocation Policy**.
- 3.19 Employee promoted or re-graded at the same location (whether in same/different Service)
- 3.19.1 Promotion – where an employee voluntarily applies for and accepts promotion at the same location, excess travel expense payments will cease;
- 3.19.2 Re-grading –if an employee's post is re-graded whilst they are in receipt of excess travelling expenses, the employee's entitlement to the remainder of their excess travelling allowance remains unchanged.
- 3.20 Excess travelling expense payments will cease where an employee is promoted to a different location.
- 3.21 Where an employee makes a voluntary sideways job change (on same pay) based at the same location (whether in same/other Service) the excess travelling expenses should continue to be paid for the balance of the agreed period, as above.
- 3.22 Where an employee makes a voluntary sideways move (on same pay) to another location. Excess travelling expenses will stop if the move is outside the employee's present location.

How to claim excess travel allowance

- 3.23 The employee completes the Excess Travelling Expenses Authorisation Form and returns it to their manager who will obtain the appropriate approval. Once authorised, the line manager either sends the paper form to the Payroll Team – The Diocese of Chelmsford Vine School Trust, 53 New Street, Chelmsford, Essex, CM1 1AT - for processing and central retention, or scans the signed form, attaches and e-mails the document to the payroll team at payroll@vineschoolstrust.org for processing (the form is subsequently held locally in the employee's personal file).
- 3.24 The Payroll Team will apply the allowance to the employee's payroll record as an equal monthly payment over a period of 18 months.

4. More Information and Help

- 4.1 Excess Travelling Expenses Authorisation Form
- 4.2 Payroll mailbox for scanned forms
payroll@vineschoolstrust.org
- 4.3 Other policies
Secondment policy and guides
- 4.4 Contact for more information
Chief Operating Officer
Tel: 01255
Email: COO@Vineschoolstrust.org
- 4.5 HR Advice and Support
Tel: 01245 430111 (Ednet 20111)
Email: HRadviceandsupport@essex.gov.uk
- 4.6 Union Advice – contact union representative(s) directly