

LANCASHIRE SCHEME FOR TRAVELLING EXPENSES FOR SCHOOL EMPLOYEES UNDERTAKING APPROVED JOURNEYS (August 2018)

The Scheme

1. Local Agreement

The Scheme is a local agreement with the recognised Teachers' Associations and Trade Unions and is therefore applicable to all maintained schools and services. School governing bodies in schools with full delegation may improve upon, but not worsen, the scheme.

2. Transport Applicable

The Scheme relates specifically to the use of private motor vehicles by school employees travelling in the course of their duties. At the same time, it is emphasised that many approved journeys can reasonably and efficiently be carried out by the use of public transport and claims at public transport rates will be met if they fall within the stipulated categories. Under normal circumstances mileage allowances are payable unless reasonable public transport is available.

3. Motor Insurance/Driving Licences

The Governing Body must ensure that teachers/support staff are aware of the need to confirm with their insurance company that the terms of their motor vehicle insurance policy provide appropriate cover for business journeys including the conveyance of pupils (if teachers or support staff choose to convey pupils). Motor insurance policies normally provide cover for social, domestic and pleasure use, which would include travel to and from home to school. As regards approved journeys, such use of privately owned vehicles is normally classed by insurers as business use, particularly when involving the conveyance of pupils. Although some policies automatically provide cover for business use, in many cases, such cover applies only to the nominated policyholder and not to other nominated drivers (eg spouse, partner, etc). School employees are strongly advised to check insurance policies or contact their insurers prior to undertaking any approved journeys as failure to disclose relevant information regarding the use of insured vehicles could invalidate cover. Employees should not therefore, undertake school business journeys unless they have adequate insurance cover. Any accident claim would be made through the driver's own insurance policy.

Checking of Driving Licences and Motor Insurance

The procedure below details the arrangements for checking driving licences and the insurance of private motor vehicles used for business purposes.

Headteachers/Managers must ensure that the expiry date of the licence is checked.

Car users must present their vehicle insurance certificate, which must clearly indicate that the vehicle is insured for business purposes in accordance with the principles above, to the person who authorises their mileage claims. This person must validate the insurance details on the Oracle System. Mileage expense claims cannot be submitted until this process has been completed.

Insurance details need to be re-authorised annually in accordance with insurance renewal dates. The Oracle System will not accept further claims for mileage expenses

without this information. Driving licences must be re-checked as part of this process.

If, for any reason, an employee who is required to drive as part of their daily duties is either prevented or disqualified from driving they must notify their Headteacher/Line Manager immediately.

4. Approval of Journeys and Claims

Claims for travel expenses for both public transport and approved car mileage claims must be made via the Oracle System and will not be met unless the procedure above has been completed.

Under the Scheme, vehicle mileage and public transport claims are recognised for approved journeys as set out in Sections B and C of the Scheme. Approval of journeys constitutes a commitment to meet costs at the published standard rate set.

When submitted the claim will be authorised on behalf of the school/service by the Headteacher/Line Manager. In respect of claims by Headteachers these will normally be authorised by the Deputy Headteacher or School Bursar.

A. Mileage Rate

Employees are eligible to claim at a standard rate which is linked to the NJC rate for business mileage rates. These are revised annually. The rate covers elements for running costs, insurance, vehicle tax and depreciation. The current rates are:

Type of Business Mileage	Current Rate
Business – Car Users (All school staff)	45p per mile for the first 10,000 miles in tax year
Business – Car Users (All school staff)	25p per mile for each mile over 10,000 miles in tax year
Business – Motorcycle Users (All school staff)	24p per mile
Business – Bicycle Users (All school staff)	20p per mile
Training – Car Users - Teachers	26.1p per mile
Training – Motorcycle Users - Teachers	26.1p per mile
Training – Car Users – Support Staff	11p per mile*
Training – Motorcycle Users – Support Staff	11p per mile*

*Subject to change in alignment with HMRC advisory fuel rate

B. Home to School Journeys

Claims for approved home to school journeys should be made via the Oracle System. These are subject to national insurance and tax and will be paid through payroll.

These are journeys from home to school and return outside school hours by individuals actively participating in events in which parents and/or pupils are involved. The maximum journey to be counted for claim purposes is 6 miles in each direction.

C. Other Approved Journeys ('Business' mileage)

Claims for other approved journeys should be made via the Oracle System. These are not subject to National Insurance and tax and will be paid according to arrangements made by the school.

Categories of Approved Journeys include:-

1. Between two or more sets of premises comprising a single school, (including split site schools) which are made necessary because of their duties.
2. Emergencies; taking children or staff home or to a doctor or hospital.
3. Journeys by teachers employed in Day and Residential Special Schools involved in:
 - (i) Conveyance of pupils to and from Child Guidance Clinics
 - (ii) Visits to hospitals with pupils requiring treatment
 - (iii) Conveyance of pupils who have absconded
 - (iv) Making approved visits to pupils' homes
 - (v) Conveyance of pupils between Residential Schools and distribution points at weekends or at the beginning or end of term
 - (vi) Visiting schools in connection with Outreach duties.
4. Participation in schools/industry links schemes, careers work and activities relating to work experience and community service projects.
5. Pastoral duties and visiting families within the area served by the school.
6. To neighbouring schools or colleges for the purposes of approved liaison work.
7. Visits to see pupils admitted to Tutorial Centres/Assessment Units.
8. Undertaking work for their own schools connected with organised games, athletics, outdoor pursuits, field studies and curriculum related activities.

(Schools will normally use a coach or mini bus where a team or large party has to be transported).
9. By headteachers or others undertaking appraisal duties.
10. Other journeys as authorised by the Headteacher/Line Manager.

Reviewed: May 19

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