West Yorkshire Combined Authority | Tracy Brabin Mayor of West Yorkshire

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West Yorkshire Combined Authority

Business Trip Briefing

Presented by Kelly Tarff

Objectives

To discuss and understand the importance of:

- Your role and responsibilities.
- Risk Levels of Business Trip
- Pre-trip Planning
- Business Trip Risk Assessment
- Formal Business Trip Plan
- Levels of Authorisation
- Pre-Departure, During and returning Briefing.



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Business Trips Policy and Procedure

The West Yorkshire Combined Authority's approach

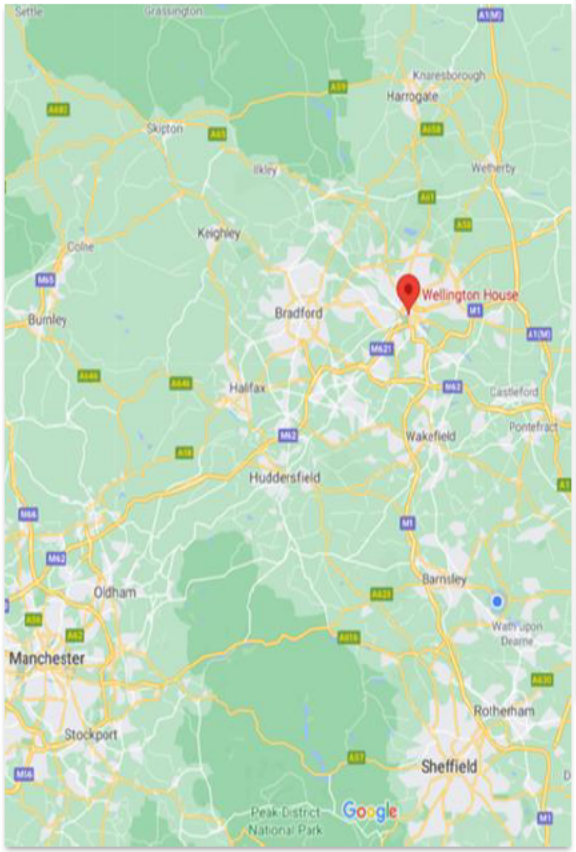
Reduce the risk



Protect

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Business Trip Categories

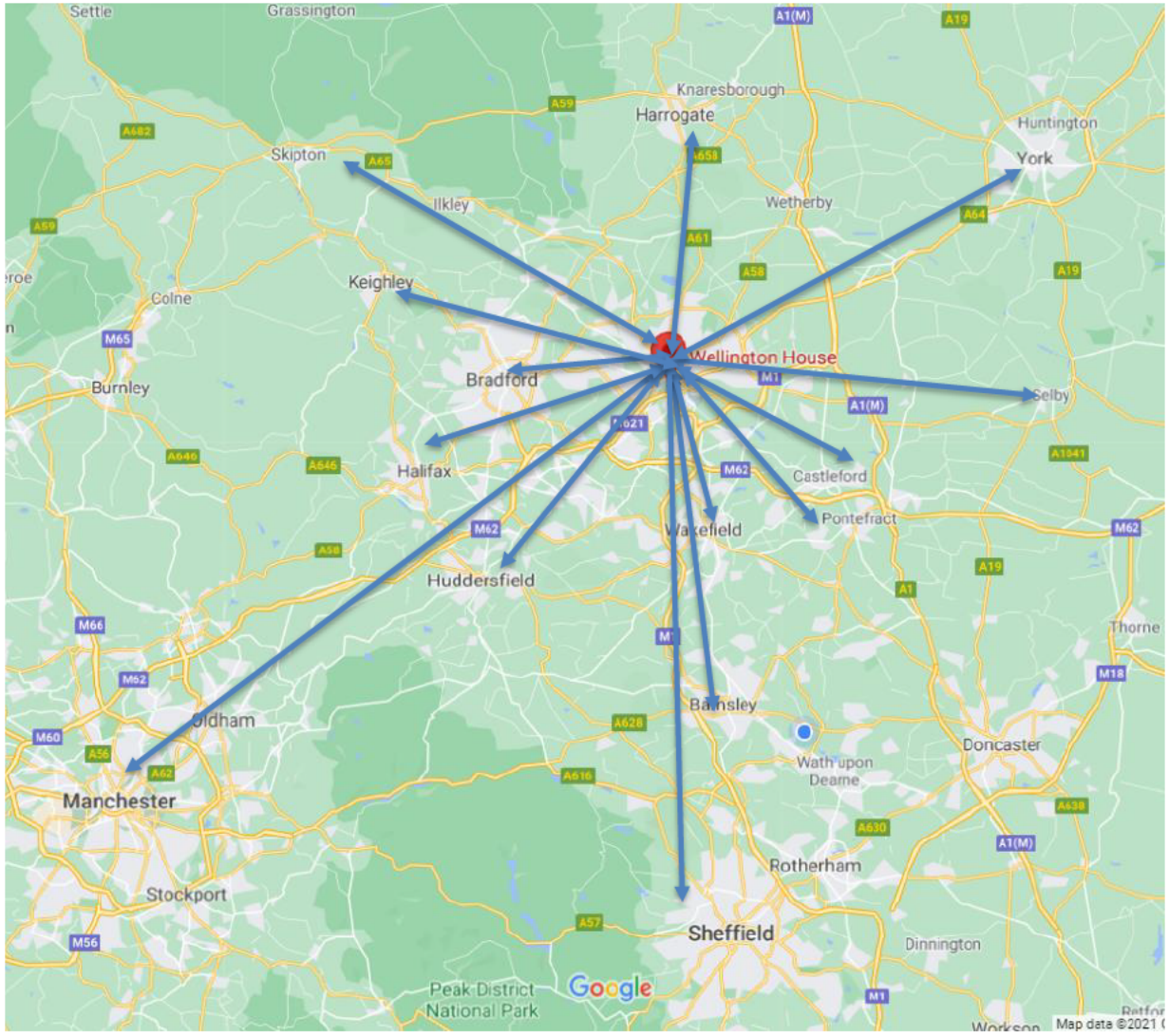






West Yorkshire Combined Authority

Planning (Pre-travel) Level 1



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Planning (Pre-travel) Form Level 2 – Part 1

WHERE

WHY

WHAT

WHO

WHERE

WHAT





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Planning (Pre-travel) Level 3 Risk Assessment



















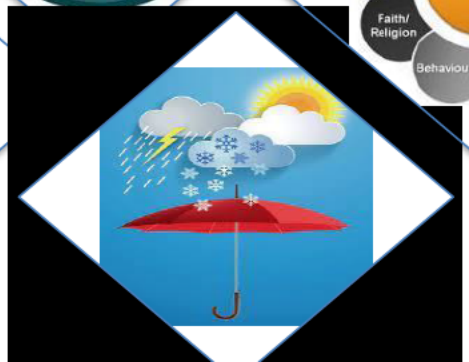












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Planning (Pre-travel) Level 3 Risk Assessment

Overseas Travel Risk Assessment Form Toolkit 1

Risk Assessment Details			
Department:	Corporate Services	**RA Number**	CS/ OTRA/001
Project / Visit Title	Trade Fair		
Locations to be Visited	Beijing, China		
Date of Assessment	31/01/2020	**Review Date**	31/01/2021
Assessors Name 1	Lee D'traveller	**Title**	Manager
Assessors Name 2	Annie Other	**Title**	Manager
Assessors Name 3		**Title**	

Risk Assessment

The purpose of this Risk Assessment is to ensure that employees who are likely to be exposed to additional risks which could affect their health, safety or security when travelling abroad consider these risks and implement any mitigations required to reduce them to an acceptable level.

This form should be completed by the individual who is undertaking the trip prior to making any firm arrangements to travel, it must be completed in discussion with their line manager, allowing sufficient time in advance of travelling for any issues to be addressed.
Before completing this form you should ensure that you are familiar with the contents of the associated Business Trips policy.
The assessment is completed by selecting relevance from the drop down boxes, adding any other hazards in to the relevant box and following the overall rating instructions at the end.

On completion and approval of this form and prior to travelling, a full travel plan should be completed and approved.

This risk assessment and its associated travel plan should be carried by the traveller(s) and a copy retained by their Department.

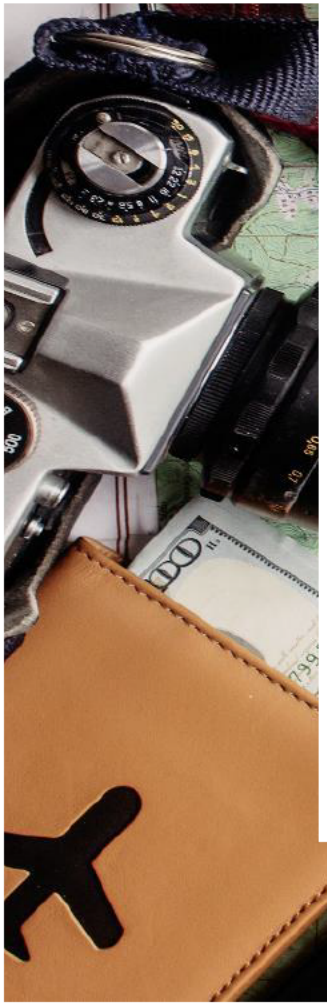
Risk Matrix

Severity of Harm		Likelihood of Occurrence		Risk Rating	
1	INSIGNIFICANT - No injury / damage	1	VERY UNLIKELY - May occur in exceptional circumstances	**1 - 8 = Low (L)**	No further action is necessary unless Circumstances change. Ensure controls are maintained.
2	MINOR - First aid treatment only	2	UNLIKELY - Probably will not Occur	**9-15 = Moderate**	Examine task closely. Additional controls may be required. Ensure controls are maintained
3	MODERATE - Lost-time injury: up to 7 days absence	3	POSSIBLE - Could occur	**16 - 25 = High (H**	Improvements in risk control are required. Review current methods & re-assess task. Suspend / restrict task until controls are implemented.
4	MAJOR - Lost-time injury: RIDDOR reportable / over 7 days absence	4	LIKELY- Probably will occur	This RA will be monitored & reviewed to take account of physical / environmental changes that occur.	
5	SIGNIFICANT - Permanent physical or mental incapacity / fatality	5	VERY LIKELY - Will occur		



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Level 3 Risk Assessment – The Journey



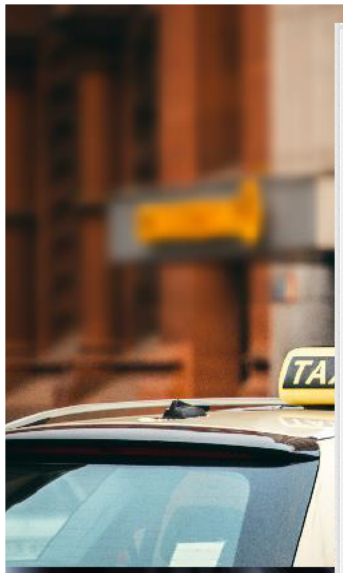
Overseas Travel Risk Assessment Form Toolkit 1

Journey						
Hazard / Consideration	**Control Measures**	**Severity (S)**	**Liklihood (L)**	**Risk Score S x L**	**Risk Rating**	**Relevant**
Unfamiliar travel route or area which may cause traveller to be stranded in potentially dangerous areas.	▪ Travellers should familiarise themselves with the travel route if it is in unfamiliar areas. ▪ Use maps and sat-nav systems to plan the routes to be used. ▪ Take local advice from hotel reception staff, host etc.	1	3	3	✓	No
Unplanned disruption to travel plans which may cause traveller to be stranded in potentially dangerous conditions.	▪ Ensure that the travel plan is known to someone. ▪ Confirm safe arrival with a family member or colleague. ▪ Carry a fully charged mobile phone. ▪ Ensure that an emergency breakdown service number is available if travelling by hire car. ▪ Carry an emergency kit if travelling in a remote area or in poor weather conditions. ▪ In extreme weather, consider whether the trip should be	2	2	4	✓	Yes
Loss or money/tickets or travel documents which may cause the traveller to be stranded.	▪ Keep some cash or a bank card separately from main purse or wallet. ▪ Carry a charged mobile phone and consider the need for an emergency phone power pack. ▪ Keep a copy of passport details separately. (scan or	3	2	6	✓	Yes
Stress. Traveller may experience stress during journey due to unfamiliarity with trip or time pressures.	▪ Ensure that the trip is planned, to minimise stress. ▪ Use navigation aids such as maps and sat-nav systems where locations and routes are unfamiliar. ▪ Allow sufficient time for the journey. ▪ Pre-book tickets, taxis and accommodation.	2	3	6	✓	Yes
Other (State).					✓	No

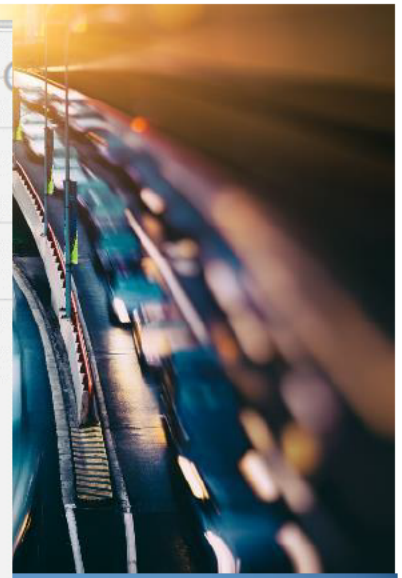
Yes
No

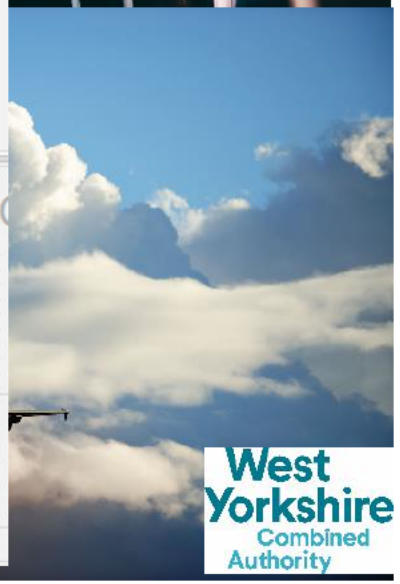
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Level 3 Risk Assessment - Transport





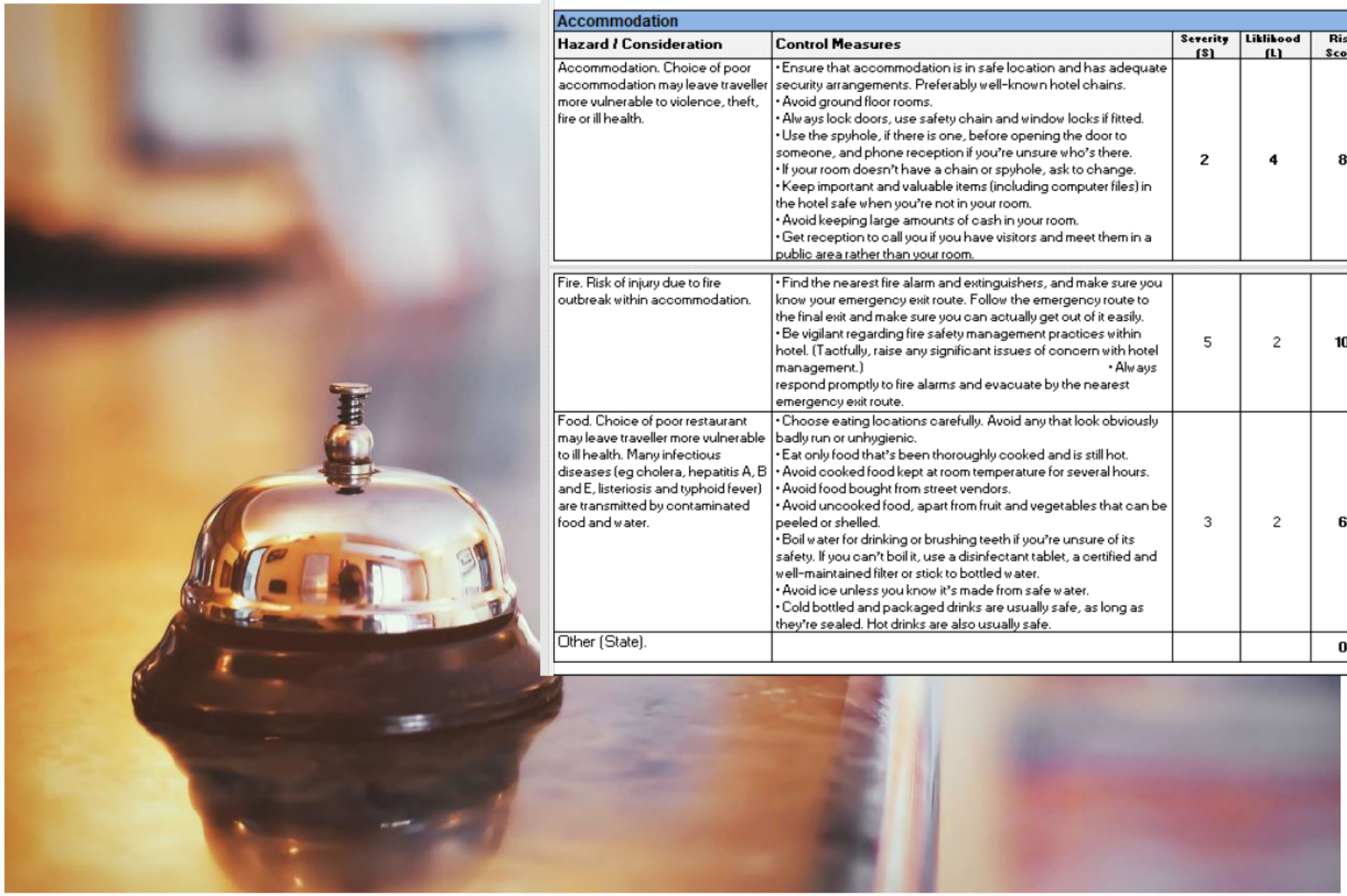




Transport						
Hazard / Consideration	**Control Measures**	**Severity (S)**	**Liklihood (L)**	**Risk Score S x L**	**Risk Rating**	**Relevant**
Walking. Risk of slips trips and falls. This is considered a normal "life risk" for most people.	• For slips, trips and falls, In normal urban conditions, no specific action needed other than reasonable care. • Travellers should ensure suitable footwear is worn, particularly if there is a risk of ice, snow, uneven or loose floor. • Avoid walking in unlit areas or walking alone late at night.	2	3	6	✓	Yes
Cycling. Injury due to collision with other vehicles, pedestrians, or due to potholes.	• Ensure that cycles are maintained in good condition. • Always use a helmet. • If cycling after dark, or in poor visibility, lights MUST be used. • Always ride with consideration for other road uses.	3	2	6	✓	No
Driving. Collision or breakdown during use of hire vehicle. Contact with authorities or criminals.	• Use only reputable car hire firms. • Inspect hired vehicles before accepting them, check tyres, brakes, oil and water levels. • Make sure there's enough fuel for your journey and check ahead for petrol stations on long journeys. • Take a break on journeys over 4 hours, if possible share the driving. • When driving take account of adverse weather, road conditions, avoid driving at night. • Carry an up-to-date driving licence and insurance documentation. • Understand local driving practices. • Carry money for fines. Don't give police your passport unless you have to- try to use some other form of identification. • Lock vehicles even if only left for a few minutes. • Keep the passenger doors locked while driving. Leave nothing valuable inside. Don't wind window down fully when speaking to strangers. • Carry emergency equipment (eg fire extinguisher, first aid kit, tool kit, spare bulbs and warning triangle) in the vehicle. • Take lots of water with you if you're driving in a hot climate. • Always leave enough room between you and the car in front to	4	3	12	!	No
Taxi. Collision, theft, assault.	• Only use reputable taxi firms. • Seek reviews or recommendations when planning the journey. • Keep valuables out of sight. • Ensure drop offs are in well lit, safe areas. If you're not confident about driving or there's a high risk of carjacking or kidnap, hire a reliable driver. - If possible, book taxis through your hotel or a reliable local contact. - Make a note of the taxi company and the driver's name, car registration, make and colour, and	4	3	12	!	Yes
Air travel. (commercial flights only). Failure to board plane.	• Ensure that valid passport, tickets, visa's etc are available. • Ensure the content of all cabin baggage conforms to airport security restrictions. • Travel arrangements must be made through the Combined Authority travel provider wherever possible. • Arrange airport collection where possible. • If possible ensure all transfers are booked in advance of travel.	2	3	6	✓	Yes
Other (State).				0	✓	No

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Level 3 Risk Assessment - Accommodation

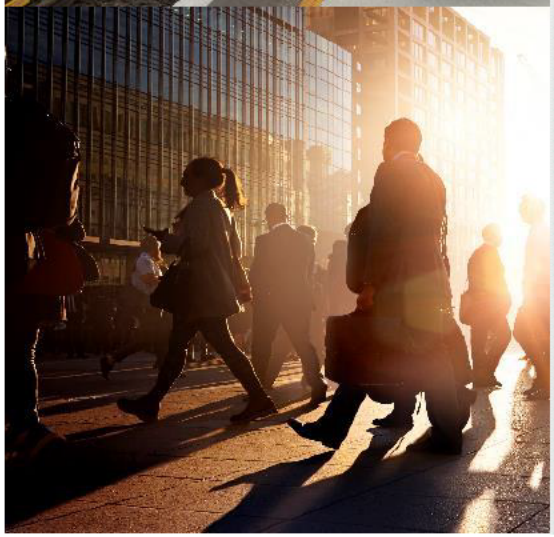


Accommodation						
Hazard / Consideration	**Control Measures**	**Severity (S)**	**Liklihood (L)**	**Risk Score**	**Risk Rating**	**Relevant**
Accommodation. Choice of poor accommodation may leave traveller more vulnerable to violence, theft, fire or ill health.	• Ensure that accommodation is in safe location and has adequate security arrangements. Preferably well-known hotel chains. • Avoid ground floor rooms. • Always lock doors, use safety chain and window locks if fitted. • Use the spyhole, if there is one, before opening the door to someone, and phone reception if you're unsure who's there. • If your room doesn't have a chain or spyhole, ask to change. • Keep important and valuable items (including computer files) in the hotel safe when you're not in your room. • Avoid keeping large amounts of cash in your room. • Get reception to call you if you have visitors and meet them in a public area rather than your room.	2	4	8	✓	Yes
Fire. Risk of injury due to fire outbreak within accommodation.	• Find the nearest fire alarm and extinguishers, and make sure you know your emergency exit route. Follow the emergency route to the final exit and make sure you can actually get out of it easily. • Be vigilant regarding fire safety management practices within hotel. (Tactfully, raise any significant issues of concern with hotel management.) • Always respond promptly to fire alarms and evacuate by the nearest emergency exit route.	5	2	10	!	Yes
Food. Choice of poor restaurant may leave traveller more vulnerable to ill health. Many infectious diseases (eg cholera, hepatitis A, B and E, listeriosis and typhoid fever) are transmitted by contaminated food and water.	• Choose eating locations carefully. Avoid any that look obviously badly run or unhygienic. • Eat only food that's been thoroughly cooked and is still hot. • Avoid cooked food kept at room temperature for several hours. • Avoid food bought from street vendors. • Avoid uncooked food, apart from fruit and vegetables that can be peeled or shelled. • Boil water for drinking or brushing teeth if you're unsure of its safety. If you can't boil it, use a disinfectant tablet, a certified and well-maintained filter or stick to bottled water. • Avoid ice unless you know it's made from safe water. • Cold bottled and packaged drinks are usually safe, as long as they're sealed. Hot drinks are also usually safe.	3	2	6	✓	Yes
Other (State).				0	✓	No

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Level 3 Risk Assessment – Human Factors

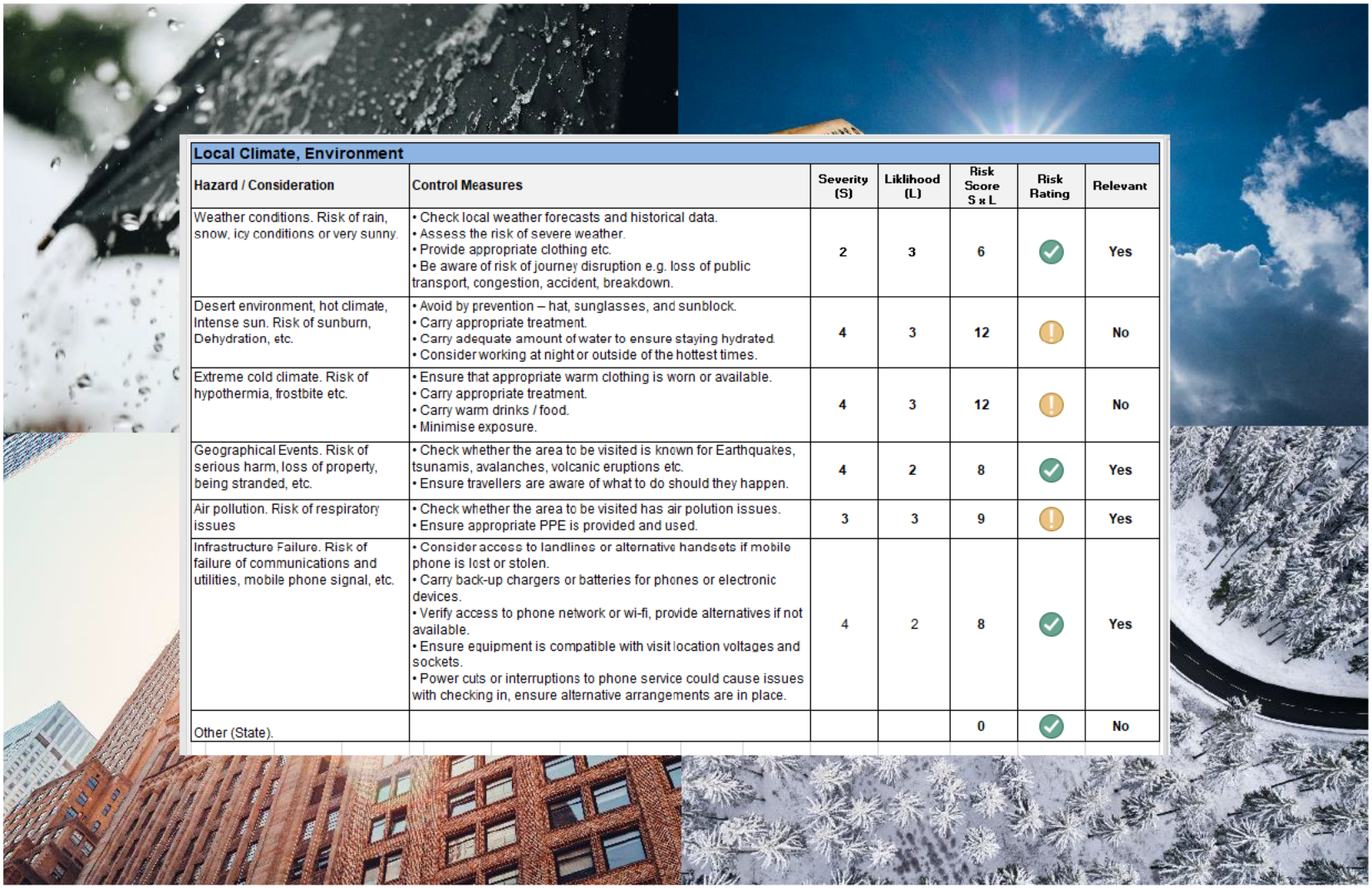




Human Factors						
Hazard / Consideration	**Control Measures**	**Severity [S]**	**Likelihood [L]**	**Risk Score**	**Risk Rating**	**Relevant**
Theft/Assault. Risk of personal assault, attack or theft of belongings.	• Be aware of the risk of theft, scams or pickpockets. • Record details of bank card numbers, issue dates, etc. and store separately both with you and at home. • Minimise amount of cash carried. Keep a small amount of money separately from your main wallet or purse. • Keep valuables secure and out of sight. • Dress appropriately to blend in to the local environment. Do not wear expensive clothes or jewellery. • Consider keeping copies of key travel documents/tickets. • Try to use well-populated carriages on trains or other modes of transport. • Be vigilant and aware of the environment and of people around. Avoid walking through areas that appear isolated or "hostile". • Consider pre-booking if seeking a taxi at night in a strange town) Where available, "Black Cabs" licensed for on-street pickup may be a safer alternative to private hire vehicles. • Have emergency contact numbers. • Report to police if theft suspected.	3	3	9		Yes
Lone working. Traveller may be alone during journeys and for long periods in hotel accommodation. This may increase risk of attack. Obtaining help may be more	• Ensure mobile phone is kept charged. • Check in with a family member or Buddy regularly. • Find out how to seek emergency help within hotel accommodation. • See also Theft/Assault above.	2	3	6		No
Cultural differences. Potential to cause offence or break the law.	• Look up guide books or websites to find out about local traditions, customs, laws and culture. • Learn the local language or at least take a phrasebook. • Respect local customs and dress codes. For example, it's illegal to import or consume alcohol in some countries. Consider what to wear to fit in and dress appropriately, particularly when visiting religious sites, business contacts and rural communities. • Be discreet when expressing views on cultural differences – take care not to make offensive comments about customs of dress, relationships, alcohol and drugs. • Avoid haggling aggressively or for too long. In most countries where haggling is common practice, it's done with humour – remember that the discount may be significant to the seller, even if it's relatively small to you. • Ask for permission before taking someone's photograph.	2	3	6		Yes
Personal differences. Traveller may have an appearance, dress style, or protected characteristic that places them at increased risk in certain cultures.	• Avoid behaviours, dress codes and activity that may be unacceptable in the locality in order to blend in. • Find out about significant cultural differences in advance of travel, the following websites/ guides may be helpful • https://www.gov.uk/guidance/lesbian-gay-bisexual-and-transgender-foreign-travel-advice • Travel guides such as Lonely Planet provide LGBT advice for most destinations - https://www.lonelyplanet.com/	4	3	12		Yes
Alcohol consumption. Consumption of alcohol may impair judgement or physical abilities making individual more vulnerable to accident or attack.	• Alcohol should not be consumed during working hours unless in accordance with exceptions within the Combined Authority policy. • Avoid drinking excessively outside of working hours, particularly in unfamiliar locations. • Be aware of drinks being "spiked". Don't leave drinks unattended.	2	3	6		Yes
Language/communication. Potential to cause offence.	• Look up guide books or websites to find out about local languages and gestures. • Learn the local language, take a phrasebook or translation app.	2	3	6		Yes
Other (State).				0		No

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Level 3 Risk Assessment – Local Climate, Environment



Local Climate, Environment						
Hazard / Consideration	**Control Measures**	**Severity (S)**	**Liklihood (L)**	**Risk Score S x L**	**Risk Rating**	**Relevant**
Weather conditions. Risk of rain, snow, icy conditions or very sunny.	• Check local weather forecasts and historical data. • Assess the risk of severe weather. • Provide appropriate clothing etc. • Be aware of risk of journey disruption e.g. loss of public transport, congestion, accident, breakdown.	2	3	6	✓	Yes
Desert environment, hot climate, Intense sun. Risk of sunburn, Dehydration, etc.	• Avoid by prevention – hat, sunglasses, and sunblock. • Carry appropriate treatment. • Carry adequate amount of water to ensure staying hydrated. • Consider working at night or outside of the hottest times.	4	3	12	!	No
Extreme cold climate. Risk of hypothermia, frostbite etc.	• Ensure that appropriate warm clothing is worn or available. • Carry appropriate treatment. • Carry warm drinks / food. • Minimise exposure.	4	3	12	!	No
Geographical Events. Risk of serious harm, loss of property, being stranded, etc.	• Check whether the area to be visited is known for Earthquakes, tsunamis, avalanches, volcanic eruptions etc. • Ensure travellers are aware of what to do should they happen.	4	2	8	✓	Yes
Air pollution. Risk of respiratory issues	• Check whether the area to be visited has air polution issues. • Ensure appropriate PPE is provided and used.	3	3	9	!	Yes
Infrastructure Failure. Risk of failure of communications and utilities, mobile phone signal, etc.	• Consider access to landlines or alternative handsets if mobile phone is lost or stolen. • Carry back-up chargers or batteries for phones or electronic devices. • Verify access to phone network or wi-fi, provide alternatives if not available. • Ensure equipment is compatible with visit location voltages and sockets. • Power cuts or interruptions to phone service could cause issues with checking in, ensure alternative arrangements are in place.	4	2	8	✓	Yes
Other (State).				0	✓	No

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Level 3 Risk Assessment – Medical Issues

Medical Issues

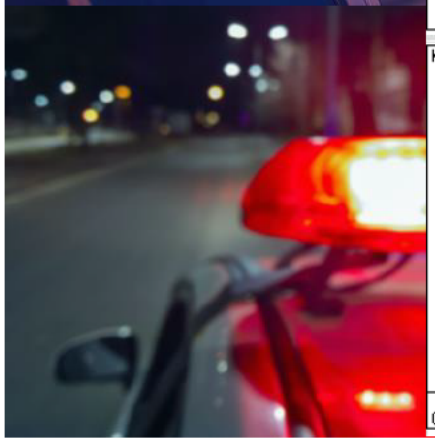
Hazard / Consideration	Control Measures	Severity (S)	Liklihood (L)	Risk Score S x L	Risk Rating	Relevant
Pre-existing medical conditions including pregnancy. Risk of becoming unwell during trip.	• Take medical advice prior to travelling. • Carry written details of medical condition, blood group, etc. Consider using In Case of Emergency "ICE" Jewelery or mobile phone apps. • Carry a copy of any prescription and supplies of medication to last several days beyond the expected return date in case of delay. • Consider translation of information into local language. • Share details of condition with colleagues where appropriate • Notify line managers of any relevant conditions that may place you at increased risk.	3	2	6	✓	Yes
Deep-Vein Thrombosis (DVT). Risk of blood clot, throbbing or cramping pain, swelling, warm skin, red or darkened skin, swollen veins that are hard or sore. These symptoms can happen in the leg, arm or tummy dependant on where the blood clot is.	• Wear loose, comfortable clothes. • Do calf exercises at least every half hour (raise your heels, keep your toes on the floor, then bring them down 10 times. Then raise and lower your toes 10 times). • Wear compression stockings. • Walk around whenever you can. • Drink plenty of water. • Do not drink alcohol or take sleeping pills.	4	2	8	✓	Yes
Local medical facilities. Risk of poor or no treatment.	• Prior to departure identify a good standard Hospital in the area. • Identify how to access to doctors/dentists. • Ensure payment methods for medical treatment are available. • Carry travel insurance details, European Health Insurance (EHIC) card, etc.	4	2	8	✓	Yes
Exposure to endemic infection or disease: Risk of illness.	• Take medical advice and arrange vaccination, inoculation, prophylaxis as appropriate. • Take any additional precautions identified e.g. hand washing, bottled water etc. • Consider the following conditions in particular: Cholera, Diphtheria, Dysentery, Hepatitis B, HIV, Japanese Encephalitis, Malaria, Meningitis, Poliomyelitis, Rabies,Tetanus, Tick-borne Encephalitis, Tuberculosis, Typhoid, Yellow Fever and Zika.	4	2	8	✓	Yes
Minor injuries and ailments: Risk of developing more serious	• Carry basic First Aid kit and over the counter medicines (for personal use).	2	3	6	✓	Yes
Insect and animal bites. Risk of discomfort, illness and disease.	• Consider likely insect / animal issues in particular area. • Avoid by prevention – repellents, clothing, etc. • Consider use of nets in accommodation. • Carry appropriate treatments.	3	3	9	!	Yes
Musculoskeletal injury. Risk from handling or carrying heavy items of luggage, sitting for long periods, particularly if journey is delayed.	• Avoid carrying heavy bags and be aware of injury risk when moving these from storage locations in vehicles. • Ensure luggage is securely stowed. • Use wheeled cases or luggage trolleys if there is a need to carry luggage for long distances. • Ensure that you move around periodically during long journeys.	3	3	9	!	Yes
Other (State).				0	✓	No



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Level 3 Risk Assessment – Other Factors





Other Factors

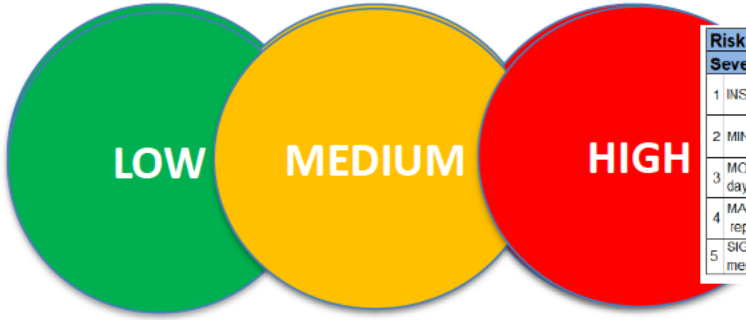
Hazard / Consideration	Control Measures	Severity (S)	Likelihood (L)	Risk Score S x L	Risk Rating	Relevant
Civil disturbance or terrorist attack. Traveller may be affected by local civil disturbance or a non-specific terrorist attack.	Although the risk is low, there is an element of threat worldwide. • Travellers should remain alert during all journeys and, where an incident has recently occurred should review the risk associated with a proposed trip to that location. • Any staff in the area where an event has occurred should contact the Combined Authority as soon as practicable to report their location and condition. • Check the Foreign and Commonwealth Office (FCO) website for up-to-date advice. https://www.gov.uk/guidance/how-the-foreign-commonwealth-office-puts-together-travel-advice • If the FCO advises against travel to destination(s) on safety/security grounds then seek approval from HoS / Line Manager • Consider not just the country in question but also any territories as identified in FCO pages • Reschedule visit or modify itinerary if at all feasible.	5	3	15	!	Yes
Leisure activities: Risk of injury with no medical insurance.	• Ensure you are adequately privately insured, WYCA insurance does not provide cover for non-business related activity such as skiing, white water rafting, bungee jumping, diving. etc.	4	3	12	!	No
Kidnap / abduction.	• Inform a trusted person of where you are going, who you might meet with, and when you expect to return. • Don't post details on social media. Stay in touch via direct and private means. • Keep a low profile, downplaying your nationality, avoid drawing unnecessary attention to yourself by dressing modestly, not wearing expensive jewelry, and not openly carrying valuable cameras or electronic equipment. • Avoid alcohol it can impair your judgment and make you less alert to your surroundings. Expat locations are often watched by criminals looking for potential victims, who they know may be intoxicated when they leave the premises, especially late at night. • Carry a fully charged mobile phone. • Avoid public transport, hire a car or use an official taxi service. Don't flag down a ride in the street. • Avoid setting patterns, take different routes, travel at different times, eat at different places, on long trips change hotels.	5	3	15	!	Yes
Other (State).				0	✓	No

West Yorkshire Combined Authority

Level 3 Risk Assessment – Overall Rating and Sign Off

Overall Rating									
When calculating the overall risk rating the following rules apply, 1. Calculate the total number of low, medium and high risk hazards fill in the relevant boxes, any high risk hazard will make the overall rating high risk. 2. If there is 1 Red High Risk Hazard you must start the scoring at 16 and add 1 to the score for each additional 4 reds. 3. If there are no Red Hazards and Green Low Risk Hazards have the highest total start the scoring at 1 and add 1 for each additional 5 greens. 4. If there are no Red Hazards and Amber Medium Risk Hazards have the highest total start the scoring at 9 and add 1 for each additional 7 ambers.								
Total No of Green Low Risk	18	Total No of Amber Medium	9	Total No of Red High	0	Overall Rating	5	✓	27 Total

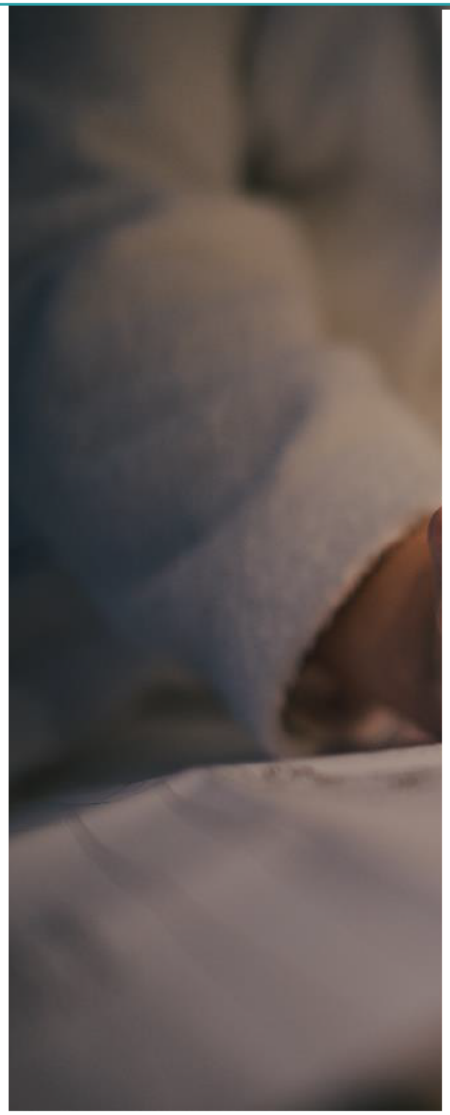
Sign-Off			
I have reviewed this risk assessment I am satisfied that suitable control measures are in place to manage foreseeable risks.			
Signed (Line Manager):	Linus M Anager	Date:	31\01\2020
Print Name:	Linus M Anager		



Risk Matrix					
Severity of Harm		Likelihood of Occurrence		Risk Rating	
1	INSIGNIFICANT - No injury / damage	1	VERY UNLIKELY - May occur in exceptional circumstances	1 - 8 = Low (L)	No further action is necessary unless Circumstances change. Ensure controls are maintained.
2	MINOR - First aid treatment only	2	UNLIKELY - Probably will not Occur	9-15 = Moderate (M)	Examine task closely. Additional controls may be required. Ensure controls are maintained
3	MODERATE – Lost-time injury: up to 7 days absence	3	POSSIBLE - Could occur	16 - 25 = High (H)	Improvements in risk control are required. Review current methods & re-assess task. Suspend / restrict task until controls are implemented.
4	MAJOR - Lost-time injury: RIDDOR reportable / over 7 days absence	4	LIKELY- Probably will occur	This RA will be monitored & reviewed to take account of physical / environmental changes that occur.	
5	SIGNIFICANT - Permanent physical or mental incapacity / fatality	5	VERY LIKELY - Will occur		

West Yorkshire Combined Authority

Planning (Pre-travel) Level 3 – Travel Planning Form



Travel Planning Form-Part 1

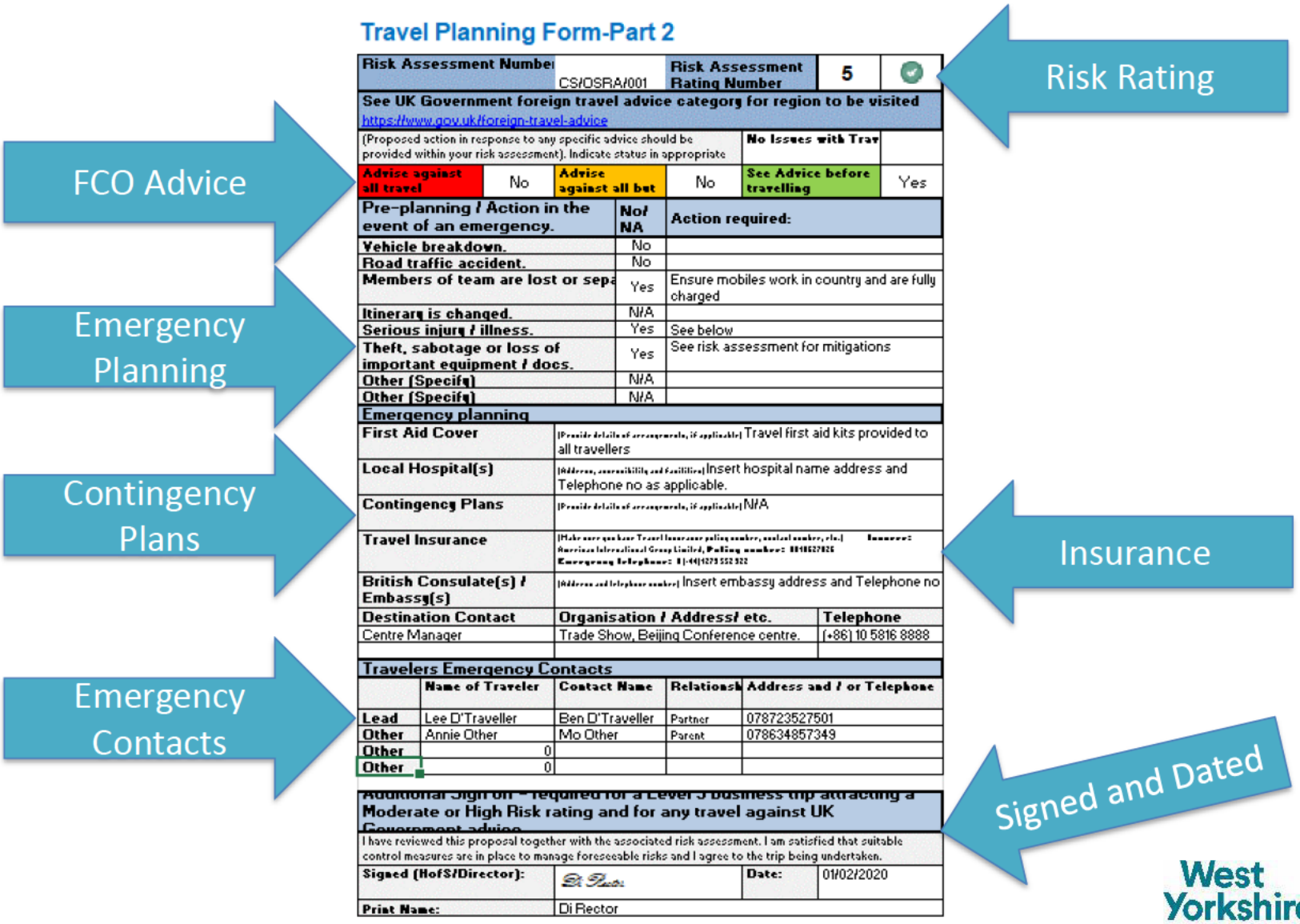
General information					
Summary Details					
Department:	Corporate Services				
Name of person	Lee D'Traveller		**Job Title:**	Manager	
Project / Visit Title	Trade Show				
Locations to be Visited		**Date**	**Date To**	**RA Number**	
Beijing, China		########	########	CS/OSTR/001	
Description of planned activities					
What is the purpose of the visit?					
Attend trade show to publisise West Yorkshire					
What activities are involved?					
Attending display unit, talking to interested parties					
Travellers					
	Name	**Staff number**	**Mobile Number**		
Lead	Lee D'Traveller	11111111	827364534		
Other	Annie Other	22222222	824059499		
Other					
Other					
Other					
Accommodation (List all – i.e. hotel, stopovers and other accommodati					
Name	**Address**		**Date Fro**	**Date To**	**Telephone**
Beijing Prime Hotel	Wangfujing Street, Beijing		########	########	(+86) 10 5816 9999
Transport					
Type	**Using**	**Booking Ref, Flight**	**Date Fro**	**Date To**	
Personal Vehicl	No				
Hire Vehicle	No				
Taxi	No				
Driver Service	No				
Bus	No				
Train	No				
Aeroplane	Yes	373t656396	########	########	
Other (Specify)	N/A				

Sign-Off for Level 3 Low Risk Business Trip (Part 2 Also			
I have reviewed this proposal together with any associated support documentation and I am satisfied that suitable control measures are in place to manage foreseeable risks. I agree to the trip being undertaken.			
Signed (Line Manager):	Linus M Anager	**Date:**	01/02/2020
Print Name:	Linus M Anager		



West Yorkshire Combined Authority

Planning (Pre-travel) Level 3 – Travel Planning Form Part 2



Travel Planning Form-Part 2

Risk Assessment Number	CS/OSRA/001	Risk Assessment Rating Number	5	
See UK Government foreign travel advice category for region to be visited https://www.gov.uk/foreign-travel-advice				
(Proposed action in response to any specific advice should be provided within your risk assessment). Indicate status in appropriate			No Issues with Trav	
Advise against all travel	No	Advise against all but	No	See Advice before travelling	Yes

Pre-planning / Action in the event of an emergency.	No/ NA	Action required:
Vehicle breakdown.	No	
Road traffic accident.	No	
Members of team are lost or sepa	Yes	Ensure mobiles work in country and are fully charged
Itinerary is changed.	N/A	
Serious injury / illness.	Yes	See below
Theft, sabotage or loss of important equipment / docs.	Yes	See risk assessment for mitigations
Other (Specify)	N/A	
Other (Specify)	N/A	

Emergency planning		
First Aid Cover	[Provide details of arrangements, if applicable] Travel first aid kits provided to all travellers	
Local Hospital(s)	[Address, accessibility and facilities] Insert hospital name address and Telephone no as applicable.	
Contingency Plans	[Provide details of arrangements, if applicable] N/A	
Travel Insurance	[Make sure you have Travel Insurance policy number, medical number, etc.] Insurance: Harrison International Group Limited, Policy number: 0818627825 Emergency Telephone: 0 [+44] 1275 552 322	
British Consulate(s) / Embassy(s)	[Address and telephone number] Insert embassy address and Telephone no	
Destination Contact	Organisation / Address/ etc.	Telephone
Centre Manager	Trade Show, Beijing Conference centre.	(+86) 10 5816 8888

Travelers Emergency Contacts				
	Name of Traveler	Contact Name	Relationsh	Address and / or Telephone
Lead	Lee D'Traveller	Ben D'Traveller	Partner	078723527501
Other	Annie Other	Mo Other	Parent	078634857349
Other	0			
Other	0			

Additional Sign off - required for a Level 3 business trip attracting a Moderate or High Risk rating and for any travel against UK Government advice			
I have reviewed this proposal together with the associated risk assessment. I am satisfied that suitable control measures are in place to manage foreseeable risks and I agree to the trip being undertaken.			
Signed (HofS/Director):		Date:	01/02/2020
Print Name:	Di Rector		

West Yorkshire Combined Authority

Travel Documents Level 3



West Yorkshire Combined Authority

Pre-Departure Briefing



West Yorkshire Combined Authority

During the Trip



West Yorkshire Combined Authority

On Return



West Yorkshire Combined Authority

Summary

- Business Trip Policy and Procedure minimum standard
- Take care of yourself and your colleagues, follow the procedure
- Complete each section, sign and date
- Undertake a risk assessment
- Obtain approval from your Manager

West Yorkshire Combined Authority

West Yorkshire Combined Authority

Thank you

West Yorkshire Combined Authority | Tracy Brabin Mayor of West Yorkshire



Code of Conduct for Officers

Legal and Governance/ Human Resources / June 2025

Part 5

Section 5.3 – Code of Conduct for officers

1. Policy Statement

The public are entitled to expect the highest standards of professional and personal behaviour and conduct from all officers. The role of officers is to serve the West Yorkshire Combined Authority (the Combined Authority) in providing advice, implementing its policies, and delivering services to the local community. In performing their duties, officers do so in accordance with the following Nolan Seven Principles of Public Life: selflessness, integrity, objectivity, accountability, openness, honesty, and leadership. This includes where officers are required to attend external meetings and act as a representative for any external organisation.

Officers are expected to comply with the general standards of work and behaviour expected of them as set out in the **Values and Behaviours** of the Combined Authority. Please refer to the intranet and Employee handbook.

All employees are bound by their terms and conditions of employment as outlined in their contracts of employment. The contractual terms are supplemented by some incorporated terms which are detailed in the CA's Employee Handbook, including the Officer Code of Conduct. Therefore, the expectation that all employees will adhere to the requirements and meet the minimum standards of behaviour and conduct as set out in the Officer Code of Conduct is a contractual obligation.

Any breach of the Code of Conduct for officers (the Code) will be considered under the Disciplinary Policy and Procedure and may lead to a disciplinary sanction being issued up to and including dismissal.

2. Policy purpose and scope

The Code of Conduct for officers sets out the standards expected of all the Combined Authority's officers. It applies to **ALL** employees[1] of the Combined Authority, (including employees who have transferred in through the Transfer of Undertakings (Protection of Employment) (TUPE) Regulations from another organisation. The Code also applies to consultants, contractors, agency staff, secondees and joint venture partners.

For the purpose of this Code, by definition, officers includes all employees who are directly employed by the Combined Authority.

Managers have a responsibility to make sure anyone they manage/or supervise are made aware of the required professional and ethical standards. Officers are responsible for ensuring they meet these standards.

[1] Colleagues working in the Policing and Crime Team are also bound by the Policing and Crime Team Code of Conduct in addition to the Officer Code of Conduct.

3. Related policies

Officers should be aware of the specific requirements of all policies and procedures including (but not limited) to those covering:

Constitution: Part 5.5: Conflicts of Interest Policy
Constitution: Part 5.6 Conflict of Interest Protocol, Loans and grants to businesses
Constitution: Part 5.7: AEB Conflicts and Officer Protocol
Constitution: Part 5.8 Member and Officer Protocol
Officer Gifts and Hospitality Policy
Disciplinary Policy and Procedure (as outlined in the Disciplinary Toolkit)
Grievance Policy
Anti-Harassment Policy
Performance Capability Policy
Whistleblowing Policy
Politically Restricted Posts Policy
ICT Security Policy
Acceptable Use Policy
ICT Password Policy
ICT Email Internet Telecoms Policy
Data Protection and Confidentiality Policy
Agile and Formal Flexible Working Policy
Absence Management Policy
Equity, Diversity and Inclusion Policy
Probation Policy
Values and Behaviours
Employee Handbook

4. Professional and Ethical Standards

Officers are expected to make choices guided by the principles and values outlined below.

The private lives of officers are a personal concern; however, all officers are expected to avoid situations and actions, both inside and outside their working hours, that conflict or may be perceived to conflict with or could be detrimental to the Combined Authority's interests.

In situations not explicitly covered, officers are expected to exercise their professional judgement and act in the best interests of the Combined Authority.

General expectations

All officers are required to:

a) Act honestly and diligently in the best interests of the Combined Authority.
b) Abide by the terms and conditions of their employment.
c) Follow all policies and procedures of the Combined Authority.

d) Recognise their obligations to officers, employers, partner organisations, suppliers and the wider community.
e) Treat everyone with dignity and respect.
f) Promote and protect the reputation and good name of the Combined Authority.
g) Take personal responsibility for their own behaviour and be mindful of its impact on others.
h) Establish professional working relationships and appropriate boundaries with other officers, and with external business associates and partner organisations.
i) Avoid reckless and negligent behaviour and to undertake appropriate risk management assessments and control measures.
j) Comply with all lawful and reasonable instructions from managers.
k) Co-operate with the Combined Authority's Monitoring Officer in terms of any investigations as and when required.
l) Maintain an appropriate and professional appearance at all times when at or representing the Combined Authority.
m) Officers must abide by relevant standards of any professional bodies where membership is an expectation or requirement of their role.

5. Political Neutrality

The Combined Authority expects officers to conduct their duties in accordance with the principles set out in this Code and not allow their own personal or political opinions to interfere with their work. Officers who are politically restricted should abide by their specific terms and conditions of employment relating to the political restrictions which apply.

Where officers are required to advise political groups, they must do so in ways that do not compromise their political neutrality.

Officers who provide regular advice to members of the Combined Authority and make recommendations on policies and strategies are deemed to be politically restricted. Officers should adhere to the Political Restricted Posts Policy.

6. Relationships

From time to time, through the nature of their work, officers may come into contact with the public and/or Members of the Combined Authority. Officers are expected to carry out their work professionally and in accordance with the principles of this Code of Conduct for officers.

Officers and Members are mutually expected to adhere to the Member and Officer Protocol. Please see link to Member and Officer Protocol.

All relationships of a business or private nature with external contractors, or potential contractors should be declared promptly.

Officers should disclose as soon as they become aware or reasonably become aware of a potential conflict of interest, if they are working with anyone in a professional capacity who is a relative or with whom they have a close personal relationship outside of work.

Disclosures should be made to an officer's line manager promptly for their consideration, using the Declaration of Officers Interests form on the CIA HR system.

7. Recruitment and other employment matters

Officers involved in appointments must ensure that these are made on the basis of merit. It would be unlawful for an officer to make an appointment which was based on anything other than ability of the candidate to undertake the duties of the post.

In order to avoid any possible accusation of bias, officers should not be involved in any appointment where they are related to or have a close personal relationship outside of work with, the person applying or selected for a post.

If an officer who is involved in a recruitment and selection process, is canvassed by a candidate or by some other person on behalf of a candidate, the officer should report the approach promptly to their manager who will liaise with their Head of Service/Director (as appropriate) as to any required action to be taken.

Officers must not be involved in, or try to influence, any decision relating to the discipline, promotion or pay adjustments for any officer who is related to them or with whom the officer has a close personal relationship with outside work.

All reasonable steps should be taken to ensure that officers are not line managed by someone with whom they are related or have a close personal relationship outside of work.

8. Equality Issues

The Combined Authority is an equal opportunities employer, and all officers, (including those identified in section 2 of this Code) are under an obligation to ensure that its policies relating to equality issues, plus any required by law are complied with.

All members of the local communities, partners and other officers have a right to be treated with fairness and equity. Officers should adhere to the Equity, Diversity and Inclusion Policy.

9. Health, Safety and Welfare

The Combined Authority places a high priority on the health, safety and welfare of all officers, visitors and members of the public.

Officers have a key role to play in ensuring a safe and healthy work environment is developed and maintained.

All officers of the Combined Authority should adhere to the Health and Safety Policy.

10. Anti-Fraud and Corruption

It is a serious criminal offence for officers corruptly to receive or give any loan, gift, fee, or advantage for doing, or not doing, anything or showing favour or disfavour, to any person in their official capacity. If an allegation is made, it is for the officer to demonstrate any such rewards have not been corruptly obtained.

Officers should adhere to the Anti-Fraud and Corruption Policy.

11. Whistleblowing

Where an officer becomes aware of activities which they believe to be illegal, improper, unethical or otherwise inconsistent with the Code of Conduct for officers, they should report the matter in line with the Combined Authority's Confidential Reporting ("Whistleblowing") Policy and associated documents.

The Whistleblowing Policy reflects the Public Interest Disclosure Act 1998 which protects officers from dismissal or victimisation if they disclose information about wrongdoing by the Combined Authority or colleagues. Officers should refer to the Whistleblowing Policy.

12. Data Protection and Confidentiality

All officers should adhere to the Data Protection and Confidentiality Policy.

13. Personal or other interests

All officers must declare any financial or business interests that they consider could bring about conflict with the Combined Authority, being involved in an official capacity with an outside organisation. This includes where officers accept another paid job with another employer outside of the Combined Authority working hours.

Where an Officer becomes aware of a potential conflict of interest, they have a responsibility to declare it immediately using the Declaration of Officer Interests form on CIA. In addition, Officers will also be required to annually review and complete the Declaration of Officer Interests form on the HR CIA HR system (refer to Appendix 1 of this Code).

An officer may seek to exempt their personal interests from the register if they consider, for instance, that having this information on record might put themselves or others at risk. In such cases, the officer should discuss the matter with the Combined Authority's Monitoring Officer.

In certain circumstances an officer's personal or other interests may be found to be inappropriate or incompatible with their duties or their role within the Combined Authority. Appropriate measures might be required to be taken, such as the removal from projects should a conflict of interest be identified. Ultimately, if an officer fails to comply with any agreed measures put in place to manage any declared interests, this will be treated as breach of the Code of Conduct and may result in formal disciplinary action being taken.

The register will be reviewed annually by the Combined Authority's Monitoring Officer. Please refer to Annex 2 for the process to be followed for new starters/annual review of officer's interests.

14. Gifts and Hospitality

Officers may from time to time, in the course of their work, encounter situations where individuals or organisations may offer gifts and hospitality. By registering offers of gifts or hospitality, whether declined or accepted, officers demonstrate the Combined Authority's commitment to openness and transparency.

Officers should adhere to the Officer Gifts and Hospitality Policy.

15. Sponsorship

Where an outside organisation wishes to sponsor or is seeking to sponsor a Combined Authority activity, whether by invitation, tender, negotiation or voluntarily, the basic conventions concerning acceptance of gifts and hospitality apply.

Where the Combined Authority is looking to sponsor an event or service, neither any officer, partner/relative must benefit from such sponsorship in any direct way without there being full disclosure to their line manager. Officers should disclose any potential conflict of interest via the Declaration of Officer Interests form on the CIA HR system.

16. Contact with the Press and Media

Officers are not permitted to provide reports or speak to the press and media on matters relating to their employment within the Combined Authority unless this is an aspect which is clearly required within their role. Any officer receiving such a press/media approach, should contact the Press office as soon as possible. The Press office will then accordingly handle any press/media responses. Officers with responsibility for speaking to the media should guard themselves against declaring a view which is contrary to a position taken by the Combined Authority which may be deemed to be critical of that decision.

17. Equality Impact Assessment

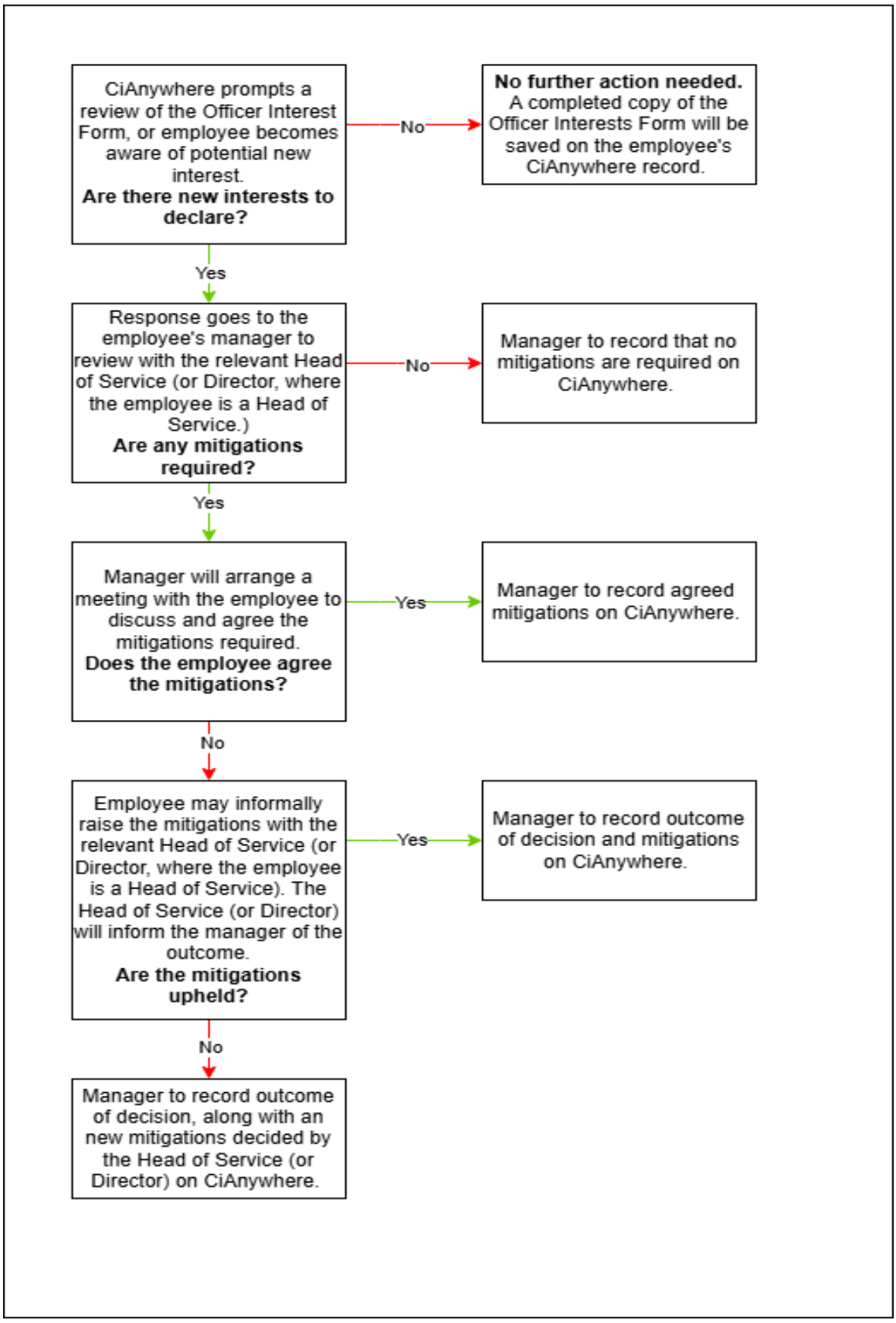
In the creation of this Code, consideration has been given to any possible adverse equality impact for the following groups: disability; gender; gender reassignment; marital status (including civil partnerships); sexual orientation; race; religion or beliefs; age; pregnancy and maternity. The policy is considered to have little or no adverse equality impact.

18. Changes to The Code of Conduct

The Combined Authority reserves the right to amend the Code as required, following consultation with the recognised trade unions and engagement with Combined Authority staff network groups. This Code will be reviewed on a three yearly basis and/or in line with governance or legislative changes

Document version control	
Municipal Year:	*2025-26*
Version:	*1 25/26*
Agreed with	S.40 Personal Information S.40 Personal Information *UNISON, Branch Convenor* *26 June 2025*
Document approved by:	*The Combined Authority*
Date:	*19 June 2025*
To be of effect from:	*19 June 2025*

Appendix 2 – Process flowchart



Part 6

Section 6.1 – Members' Allowances Scheme – Municipal Year 2025/26

1. This Scheme may be cited as the West Yorkshire Combined Authority Members' Allowances Scheme and shall have effect for the municipal year 2025/26. It shall continue in force, as amended from time to time, until revoked or amended.

2. In this Scheme:

"Combined Authority Member" means a Combined Authority Member appointed in accordance with paragraph 1 of Schedule 1 of the West Yorkshire Combined Authority Order 2014, as amended by the West Yorkshire Combined Authority (Election of Mayor and Functions) Order 2021. For clarity, this includes the Mayor.

"Co-opted Member" means a person who is not a Combined Authority Member but who is co-opted to any committee or sub-committee of the Combined Authority[1].

The **"West Yorkshire Business Board"** means the West Yorkshire Business Board.

The **"Chair of the West Yorkshire Business Board"** means the Chair of the West Yorkshire Business Board appointed pursuant to Article 10 of the Constitution.[2]

A **"West Yorkshire Business Board Member"** means a member of the West Yorkshire Business Board appointed in accordance with Article 10 of the Constitution, or their substitute.

"Independent Member" means a Member who is appointed by the Combined Authority pursuant to Section 28 of the Localism Act 2011 or Section 14 of the Combined Authorities (Overview & Scrutiny Committees, Access to Information and Audit Committees) Order 2017 as amended by Combined Authorities (Overview and Scrutiny Committees, Access to Information and Audit Committees) (Amendment) Regulations 2024.

"Member" means a Combined Authority Member, a Co-opted Member, a West Yorkshire Business Board Member or Independent Member as defined above.

"Annual Meeting" means the Combined Authority's annual meeting held each year.

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[1] For the purposes of claiming travel and subsistence expenses and childcare/dependent carers' allowances only, any reference to a Co-opted Member shall be taken to include any independent members appointed by the Combined Authority.

[2] Including the Deputy Chair whilst acting as interim Chair.

3. This Scheme applies to the Mayor, all Combined Authority Members, Co-opted Members, the West Yorkshire Business Board Chair, and West Yorkshire Business Board Members.

4. Schedules to the Scheme:

Schedule A: Allowances and Remuneration
Schedule B: Approved Duties – Combined Authority
Schedule C: Approved Duties – West Yorkshire Business Board
Schedule D: Expenses

The Scheme

1. Introduction

1.1 This Scheme sets out the entitlement of:

- any Member, as defined above, to claim expenses incurred in carrying out their role, and
- the levels of remuneration applicable to the Mayor, Co-opted Members, Independent Members, and the Chair of the West Yorkshire Business Board.

2. Allowances

Mayor's Allowance

2.1 The 2021 Order enables the Combined Authority to establish an Independent Remuneration Panel ("IRP") which may make recommendations regarding allowances payable to the Mayor. The IRP must consist of at least 3 members, none of whom:

(a) is also a Combined Authority Member or committee or sub-committee of the Combined Authority, or a Member of a Constituent Council; or

(b) is disqualified from being or becoming a Combined Authority Member.

2.2 The Combined Authority may pay an allowance to the Mayor[3], but only if it has considered recommendations made by the IRP for the payment of such an allowance. Where the IRP recommends the payment of an allowance to the Mayor, the Combined Authority may not pay an allowance to the Mayor which exceeds the allowance recommended by the IRP.

[3] The West Yorkshire Combined Authority (Election of Mayor and Functions) Order 2021 also provides for the Combined Authority to pay an allowance to the Deputy Mayor provided that the Deputy Mayor is not a Leader, or elected Mayor of a Constituent of Non-Constituent Council or the West Yorkshire Business Board Chair. No allowance is currently payable under this provision.

2.3 The IRP recommended an allowance for the Mayor which was approved by the Combined Authority and is set out in **Schedule A.**

Co-opted Member Allowance

2.4 An allowance is payable to Co-opted Members as set out in **Schedule A**.

Combined Authority Members

2.5 With the exception of the Mayor[4], any Combined Authority Member (as distinct from a Co-opted Member) is only entitled to expenses for travel and subsistence, and no other allowances under this Scheme.

Chair of the West Yorkshire Business Board

2.6 The role of Chair of the West Yorkshire Business Board requires direct and pro-active leadership, and as such a greater time commitment than that required from any other member of the West Yorkshire Business Board. The Chair, along with the Combined Authority's Chief Executive is required to provide a formal assurance statement on an annual basis on the status of governance and transparency, as part of the Annual Conversation process with Government. In recognition of this, the Chair of the West Yorkshire Business Board may be remunerated. Any remuneration to the Chair of the West Yorkshire Business Board will be approved and implemented by the Combined Authority, further to a recommendation by an Independent Remuneration Panel.[5]

The agreed level of remuneration for the West Yorkshire Business Board Chair is as set out in **Schedule A.**

No remuneration will be paid under this Scheme to the Chair of the West Yorkshire Business Board without:

- a dated invoice setting out the period in respect of which the claim is made, and
- a statement signed by the Chair of the West Yorkshire Business Board that they have complied with all conditions on the appointment letter which set out the basis on which their remuneration was agreed.

2.7 West Yorkshire Business Board Local authority representatives

(a) A member of the West Yorkshire Business Board who is a local authority representative (or their substitute) is not entitled to any expenses under this Scheme for carrying out any duty for which they may claim under their local authority's allowances scheme.

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[4] See footnote above in relation to the Deputy Mayor.

[5] The Panel shall be constituted of the members of the Combined Authority's Independent Remuneration Panel together with one or more private sector representatives who are not members of the West Yorkshire Business Board with terms of reference to be agreed by the West Yorkshire Business Board.

(b) For the avoidance of doubt, whether or not they are entitled to any such expenses or allowances under their local authority's allowances Scheme, no member of the West Yorkshire Business Board who is a local authority representative (or their substitute) is entitled to claim any allowance under this Scheme in respect of attending any meeting of the West Yorkshire Business Board.

(b) Subject to 2.7(a) above, the Combined Authority may pay for travel and accommodation expenses for any local authority representative acting in their capacity as a member of the West Yorkshire Business Board, provided that this is approved in advance by the Combined Authority's Assistant Director Legal, Governance & Compliance and booked by the Combined Authority in accordance with the provisions of this Scheme.

2.8 Indexation of Allowances

The allowances detailed in Schedule A will be increased annually in line with the Passenger Transport Forum (PTF) annual percentage salary increase applicable to staff of the Combined Authority at SCP 30 (Grade 9). Allowances will be increased on the 1st October each year, backdated as necessary. The Mayor's allowance will be increased each year on the anniversary of their appointment.

2.9 One Allowance Only Rule

A Co-opted Member can only receive one allowance from the Combined Authority.

3. Travel Expenses

3.1 Subject to any exceptions or requirements set out in this Scheme, a Member, as defined above, engaged in any of the Approved Duties set out in **Schedule B** or **Schedule C**, as applicable, may reclaim any travel costs they incur, in accordance with **Schedule D**.

4. Subsistence Expenses

4.1 Subject to any exceptions or requirements set out in this Scheme, a Member, as defined above, engaged in any of the Approved Duties set out in **Schedule B** or **Schedule C,** as applicable, may reclaim any subsistence costs they incur, in accordance with **Schedule D**.

5. Childcare and Dependent Care Allowance

5.1 Subject to any exceptions set out in this scheme, a Member, as defined above, may re-claim any costs they incur provided the costs are incurred while engaged on Approved Duties set out in **Schedule B** or **Schedule C**, as applicable, and subject to the terms and conditions set out in **Schedule D**.

6. Implementation and Backdating of Recommendations

6.1 The allowances are implemented from the date of the Annual Meeting and paragraph 7 (Part Year Entitlements) applies.

7. Part Year Entitlements

7.1 The provisions of this paragraph shall have effect to regulate the entitlements of a Member to allowances where, in the course of a year, this Scheme is amended or that Member becomes, or ceases to be, a Member, or accepts or relinquishes the responsibilities of a role for which an allowance is payable.

7.2 If an amendment to this Scheme changes the amount to which a Member is entitled, then in relation to each of the periods:

(a) beginning with the year and ending with the day before that on which the first amendment in that year takes effect, or

(b) beginning with the day on which an amendment takes effect and ending with the day before that on which the next amendment takes effect, or (if none) with the year

the entitlement to such an allowance shall be to the payment of such part of the amount of the allowance under this Scheme as it has effect during the relevant period as bears to the whole the same proportion as the number of days in the period bears to the number of days in the year.

7.3 Where the term of office of a Member begins or ends other than at the beginning or end of a year, the entitlement of that Member to any allowance shall be to the payment of such part of the allowance as bears to the whole the same proportion as the number of days during which their term of office subsists bears to the number of days in that year.

7.4 Where this Scheme is amended as mentioned in paragraph 7.2, and the term of office of a Member does not subsist throughout the whole, or any period mentioned in sub-paragraph 7.2(a), the entitlement of any such Member to an allowance shall be to the payment of such part of the allowance referable to each such period (ascertained in accordance with that sub-paragraph) as bears to the whole the same proportion as the number of days during which their term of office as a member subsists bears to the number of days in that period.

8. Renunciation of Entitlement to Remuneration or Expenses

8.1 Any Member may by notice in writing given to the Assistant Director Legal, Governance and Compliance elect to forego all or any part of their entitlement to any expenses under this scheme.

9. Claims and Payments

9.1 A claim for travelling and subsistence expenses under this Scheme shall be made in writing **within three months** of the date of the duty in respect of which the entitlement to the allowance arises.

9.2 A claim for all expenses under this Scheme or any expense under any other provisions shall include, or be accompanied by, a **statement signed by the claimant** that:

- the claimant has incurred the expenditure shown on the claim,
- the claimant has not made and will not make any other claim either under this scheme or to any other body or organisation in respect of the matter to which their claim relates.

9.3 No expenses will be paid under this Scheme without:

(a) a **dated receipt**[6] (except in relation to car mileage claims), and

(b) in the case of **travel expenses**, the amount being in line with the requirements and restrictions set out in Schedule D, and

(c) in the case of **subsistence expenses**, the amount not exceeding the maximum authorised by the Combined Authority in Schedule D.

(d) in the case of **car mileage expenses**, that:

- no suitable alternative public transport was available (claimant to provide explanation) or there were special circumstances (to be specified by claimant), and
- it was not reasonable for the claimant to have travelled with another Member or officer (claimant to provide explanation), and,

(e) in the case of travel expenses for **taxi costs** incurred, that it was not reasonable to use public transport (claimant to provide explanation) and that the Assistant Director Legal, Governance & Compliance has agreed this in advance where reasonably practicable.

9.4 Subject to any external timing constraints, payments shall be made:

(a) in respect of **allowances and remuneration payable to the Mayor, Co-opted Members or Chair of the West Yorkshire Business Board** in instalments of one-twelfth of the amount specified in this Scheme on the last Thursday of each month.

(b) in respect of **travelling**, **subsistence**, **childcare/dependent carers' expenses**, on the last Thursday in each month for all fully completed claims received by the end of the previous week; and

(c) in respect of a large expense claim, suitable arrangements will be made where specially requested by the claimant concerned.

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[6] For avoidance of doubt, please note that this requirement applies in relation to costs incurred both in the UK and overseas.

9.5 Where a payment of one-twelfth of the amount specified in this Scheme in respect of an allowance would result in the Member receiving more than the amount to which, by virtue of paragraph 7 (Part Year Entitlements), they are entitled, the payment shall be restricted to such amount as will ensure that no more is paid than the amount to which they are entitled.

10. Duplication of Allowances and Expenses Claims

10.1 No Member may receive an allowance or expenses from more than one authority in respect of the same duties[7]

11. Information Technology Equipment

11.1 The Mayor will be provided with IT equipment to enable the discharge of their functions. No other Member will be provided with IT equipment.

12. Publishing Remuneration and Expenses Paid

12.1 This Scheme will be published on the Combined Authority's website.

12.2 A summary of remuneration and expenses paid under this Scheme each year[8] will be published on the Combined Authority's website.

13. Pensions

13.1 The eligibility for elected members to enter into the Local Government Pension Scheme by virtue of their office was removed by the Local Government Pension Scheme (Transitional Provisions, Savings and Amendment) Regulations 2014, following the end of the term of office they were serving on 1 April 2014.

13.2 The Local Government Pension Scheme (Amendment) (Elected Member Pensions) Regulations 2026 reversed this position. As such from the 11 May 2026 the 2026 Regulations allow for the introduction of English councillors and mayors into the Local Government Pension Scheme.

13.3 Where the Combined Authority pays a "relevant allowance" (an allowance other than travel and subsistence) to a Member under this Members' Allowance Scheme, the allowance is treated as pensionable. The Combined Authority shall make employer contributions and any other payments required to fund the pension benefits attributable to those allowances.[9]

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[7] The Combined Authority will withhold an allowance under this provision where an authority has confirmed that a Co-opted Member is carrying out duties for the Combined Authority in a capacity for which they are receiving an allowance from that authority.

[8] A year for this purpose is the financial year running from 1 April to 31 March

[9] It should be noted that the pension is on an 'opt-in' basis as set out in the Local Government Pension Scheme (Amendment) (Elected Member Pensions) Regulations 2026

Schedule A: Allowances and Remuneration

Note: see paragraph 2.8 of the Scheme re indexation of allowances

Mayoral Remuneration	(per annum)
Mayor	£118,330.22

Governance and Audit Committee	Allowance (per annum)
Chair (Independent Member)	£5,637.50
Local Authority Member	£2,181.20
Independent Member	£2,181.20

Scrutiny Committee Co-opted Members	Allowance (per annum)
Chair	£13,626.35
Vice-Chair	£5,358.70
Ordinary Member	£3,519.85
Deputy Member	£1,194.12

Transport Committee Co-opted Members	Allowance (per annum)
Deputy Chair(s)	£14,974.22[10]
Transport Engagement Leads	£3,994.42[11]
Ordinary Members[12]	£2,852.57

West Yorkshire Business Board Chair Remuneration	(per annum)
West Yorkshire Business Board Chair	£31,365

[10] Includes ordinary members' allowance of £2,783 p.a.
[11] Includes ordinary members' allowance of £2,783 p.a.
[12] Ordinary members do not include Transport Portfolio Holders.

WYCA Independent Person(s)	Allowance
Annual retainer	£872.27 per annum
Allowance per conduct meeting (for each day or part day)	£220.19

Independent Member – Finance, Resources and Corporate Committee	Allowance
Independent Member	£2,627.07 per annum

Schedule B: Approved Duties – Combined Authority

The following are specified as an approved duty for purpose of the payment of travelling and subsistence expenses and dependents carers allowance:

(i) A meeting of the Combined Authority, any committee or sub-committee of the Combined Authority or of any other body to which the Combined Authority makes appointments or nominations, or of any committee or sub-committee of such body.

(ii) Any other meeting the holding of which is authorised by the Combined Authority, provided that it is a meeting to which members of at least two political groups have been invited.

(iii) Meetings of a non-commercial, non-political and non-party political nature, (including with Ministers, Members of Parliament, European Members of Parliament, representatives of Government Departments and representatives of major companies who have an involvement in any matter relevant to functions of the Combined Authority) attended by:

a) a Combined Authority Member, or

b) any Co-opted Member who is the Chair or Deputy Chair of a relevant committee, or

c) any Co-opted Member who is a nominee of (a) or (b) above

in their capacity as a representative of the Combined Authority, for the purpose of discussing matters which relate to the functions of the Combined Authority or of a constituent or non-constituent council of the Combined Authority, or any other council in which the Combined Authority has an interest in the particular function involved.

(iv) Conferences, seminars and study courses, only where the Assistant Director Legal, Governance & Compliance is satisfied that they represent value for money and are being held for the purpose of discussing non-political matters which relate to the functions of the Combined Authority or any functions of the local authorities in which the Combined Authority has an interest[13].

(v) At representative functions, official functions, responding to invitations to meet and/or address voluntary and other organisations, site visits and meetings with officers subject to the prior agreement of the Assistant Director Legal, Governance & Compliance.

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[13] By law, this provision does **not** extend to payment to any Member in respect of attendance at conferences convened by any body "the objects of which are wholly or partly political" (Section 175 Local Government Act 1972).

Schedule C: Approved Duties – The West Yorkshire Business Board

The following are specified as an approved duty for purpose of the payment of travelling and subsistence expenses and dependents carers allowance:

(i) Public meetings of the West Yorkshire Business Board.

(ii) Subject to prior agreement by the Assistant Director Legal, Governance & Compliance that:

- attendance is in the capacity **as a member of the West Yorkshire Business Board,**
- the meeting represents **value for money,** and
- the function or event is being held for the purpose of discussing non-political matters which relate to the **functions of the West Yorkshire Business Board**:

(a) meetings of a non-political and non-party political nature, including with Ministers, Members of Parliament, European Members of Parliament, representatives of Government Departments and representatives of major companies, and

(b) attending any of the following:

- conferences, seminars and study courses[14]
- representative function and events,
- official functions and events,
- responding to invitations to meet and/or address relevant organisations,
- site visits, and
- meetings with the Combined Authority or other Leeds City Region local authority officers.

[14] This provision does not extend to payment to any member of the West Yorkshire Business Board in respect of attendance at conferences convened by any body, the objects of which are wholly or partly political.

Schedule D: Expenses

Travelling Expenses

1. Bus and Rail Travel

Members are expected to travel by bus or by standard class rail, or by bicycle. First class travel is considered acceptable only in the following circumstances and by prior agreement of the Assistant Director Legal, Governance & Compliance:

- Additional space and privacy are required during the journey in order to work or to enable confidential conferences to be held on the train.
- Where the cost of discounted first-class travel is less than that of the cheapest available standard class ticket.
- To avoid disadvantaging members when travelling with other organisations, or
- Any other special circumstances, which in the view of the Monitoring Officer, would justify first class travel.

Rail travel should be booked in advance through the Combined Authority to take advantage of discounted tickets and special offers.

Claims for car expenses will therefore only be paid where there is no suitable alternative public transport available or there are special circumstances.

2. MCard/Metrocards

Members of the Transport Committee and the Mayor are entitled to a MCard/Metrocard. Other Members are permitted to apply for an MCard but would be required to contribute a reasonable proportion to the cost to the Combined Authority of the card, in relation to the element of personal usage that could be made of it.

Where a Member holds a MCard/Metrocard, they should use this where reasonably practicable rather than other forms of transport.

When a Member ceases to be a member of the Transport Committee they must return their MCard/Metrocard.

3. Car Mileage Rates - (HMRC published mileage rates)

Approved Mileage Rates		
	First 10,000 business miles in the tax year	Each business mile over 10,000 in the tax year
Cars and vans	45p	25p
Motorcycles	24p	24p
Bicycles	20p	20p

4. Passenger Rates

Where a Member carries a passenger for a work journey, they can claim the HMRC approved passenger mileage rate of 5p per passenger mile, in addition to the applicable mileage rates for motor cars.

5. Taxi Travel

In rare circumstances (for example, cases of urgency or where no alternative mode of public transport is reasonably available), it may be necessary to travel by taxi. In such circumstances, the amount of the fare paid is reimbursable on production of a valid receipt. Where reasonably practicable, agreement should be sought in advance from the Monitoring Officer.

6. General Travel Expenses

To reduce costs to the Combined Authority, a Member should not travel independently where it would be possible to travel with another Member or officer.

A Member may claim specific reimbursement for expenditure incurred on tolls, ferries or parking fees as these are deemed to be additional to the basic car allowance rates.

Subsistence Expenses

7. Day subsistence rates are based on 'meals' taken with eligibility based on the time of the day the meal is taken and time away from home as set out below.

In each instance only the actual cost incurred may be claimed with the following being the maximum rates claimable:[15]

[15] These figures are reviewed annually in line with the rates applicable to, and published by, the Passenger Transport Forum for Non-Manual Employees of Passenger Transport Executives.

Day Subsistence Rates		
Breakfast allowance	£8.28	More than 4 hours away from normal place of residence before 11am.
Lunch allowance	£11.28	More than 4 hours away from normal place of residence including the period between 12 noon and 2pm.
Tea allowance	£4.54	More than 4 hours away from normal place of residence including the period between 3pm to 6pm.
Evening meal allowance	£14.09	More than 4 hours away from the normal place of residence after 7pm.

Note: The current total daily maximum subsistence claimable (£38.19) should not be disaggregated and applied to specific meals but a 24-hour maximum claimable to be spent upon subsistence as required.

8. Overnight Stays

All overnight accommodation should be booked and paid for directly through the Combined Authority taking advantage of any corporate rates and offers to seek out the most reasonably priced accommodation available, thus avoiding any claims for reimbursement. Where, exceptionally, this is not possible, actual costs will only be reimbursed where they are supported by receipts.

9. Overseas Travel

Members are entitled to claim reasonable expenses in relation to their journey and stay, reimbursable upon production of receipts. It is expected that the necessary travel and accommodation arrangements would be booked in advance through the Combined Authority in advance to take advantage of special rates and offers.

In the case of West Yorkshire Business Board Members only, the Chief Executive is also required to confirm that the member of the West Yorkshire Business Board's attendance at the overseas function or event:

- is in the capacity **as a member of West Yorkshire Business Board,**
- represents **value for money,** and
- is required to facilitate the proper promotion or safeguarding of Combined Authority interests.

Note: In the case of travel abroad there are sometimes difficulties in obtaining receipts. However, for the reasons given above, reimbursement will only be available where receipts are provided.

10. Meals Provided Free of Charge

Members are required to deduct an appropriate amount from the subsistence expenses specified in the table above in respect of any meals provided free of charge by an authority or body in respect of the meal or the period to which the expense relates. Expenses cannot be claimed where a free meal has been provided.

11. Meals Taken on Trains

Where main meals are taken on trains during the period for which there is an entitlement to day subsistence expenses, the reasonable cost of meals (including VAT) shall be reimbursable in full. This will then replace the specific meal allowances set out above.

Childcare and Dependent Carers' Allowance

12. Where a Member needs to engage a carer to enable them to carry out an Approved Duty, an allowance is payable in respect of the expenses of arranging for the care of:

- Members' children under the age of 14, or
- any dependents where there is medical or social work evidence that care is required.

The Approved Duties for which the dependent carers' allowance may be claimed are set out in **Schedule B** and **Schedule C**.

13. The allowance is subject to the following conditions:

(a) The allowance is payable for the care of any dependent person within the claimant's household.
(b) The allowance is only payable when the care is provided by someone who is not a household or family member.
(c) The amount payable will be for the actual cost of care.
(d) Payment will be made to the member, not the carer.
(e) The claimant will be required to sign a declaration that they have complied with these conditions.

14. The maximum rates of such allowances are set out below and are subject to the Member observing the protocol on the claims procedure and eligibility criteria.

Childcare Element

15. For children under the age of 14:

- the real UK Living Wage, as determined by the Living Wage Foundation;
- care must be provided by a registered child-minder.

Other Dependents Element

16. Maximum rate payable = the hourly rate charged by Adult Social Services for domiciliary home care.

17. For both types of care, there is a monthly cap of £100, regardless of type or number of dependents and receipts must be provided.

Document Version Control	
Municipal Year:	2025-26
Version:	3 - 25/26
Document approved by:	Assistant Director Legal, Governance & Compliance
Date:	08 May 2026
To be of effect from:	08 May 2026

Overseas Travel Risk Assessment Form Toolkit 1

Risk Assessment Details			
Department:		**RA Number**	
Project / Visit Title			
Locations to be Visited			
Date of Assessment		**Review Date**	
Assessors Name 1		**Title**	
Assessors Name 2		**Title**	
Assessors Name 3		**Title**	

Risk Assessment

The purpose of this Risk Assessment is to ensure that employees who are likely to be exposed to additional risks which could affect their health, safety or security when travelling abroad consider these risks and implement any mitigations required to reduce them to an acceptable level.

This form should be completed by the individual who is undertaking the trip prior to making any firm arrangements to travel, it must be completed in discussion with their line manager, allowing sufficient time in advance of travelling for any issues to be addressed.
Before completing this form you should ensure that you are familiar with the contents of the associated Business Trips policy.

The assessment is completed by selecting relevance from the drop down boxes, adding any other hazards in to the relevant box and following the overall rating instructions at the end.

On completion and approval of this form and prior to travelling, a full travel plan should be completed and approved.

This risk assessment and its associated travel plan should be carried by the traveller(s) and a copy retained by their Department.

Risk Matrix

Severity of Harm	Likelihood of Occurrence	Risk Rating	
1 INSIGNIFICANT - No injury / damage	1 VERY UNLIKELY - May occur in exceptional circumstances	**1 - 8 = Low (L)**	No further action is necessary unless Circumstances change. Ensure controls are maintained.
2 MINOR - First aid treatment only	2 UNLIKELY - Probably will not Occur	**9-15 = Moderate (M)**	Examine task closely. Additional controls may be required. Ensure controls are maintained
3 MODERATE – Lost-time injury: up to 7 days absence	3 POSSIBLE - Could occur	**16 - 25 = High (H)**	Improvements in risk control are required. Review current methods & re-assess task. Suspend / restrict task until controls are implemented.
4 MAJOR - Lost-time injury: RIDDOR reportable / over 7 days absence	4 LIKELY- Probably will occur	This RA will be monitored & reviewed to take account of physical / environmental changes that occur.	
5 SIGNIFICANT - Permanent physical or mental incapacity / fatality	5 VERY LIKELY - Will occur		

Overseas Travel Risk Assessment Form Toolkit 1

Journey						
Hazard / Consideration	**Control Measures**	**Severity (S)**	**Liklihood (L)**	**Risk Score S x L**	**Risk Rating**	**Relevant**
Unfamiliar travel route or area which may cause traveller to be stranded in potentially dangerous areas.	• Travellers should familiarise themselves with the travel route if it is in unfamiliar areas. • Use maps and sat-nav systems to plan the routes to be used. • Take local advice from hotel reception staff, host etc.	**3**	**3**	**9**		
Unplanned disruption to travel plans which may cause traveller to be stranded in potentially dangerous conditions.	• Ensure that the travel plan is known to someone. • Confirm safe arrival with a family member or colleague. • Carry a fully charged mobile phone. • Ensure that an emergency breakdown service number is available if travelling by hire car. • Carry an emergency kit if travelling in a remote area or in poor weather conditions. • In extreme weather, consider whether the trip should be cancelled.	2	2	**4**		
Loss or money/tickets or travel documents which may cause the traveller to be stranded.	• Keep some cash or a bank card separately from main purse or wallet. • Carry a charged mobile phone and consider the need for an emergency phone power pack. • Keep a copy of passport details separately. (scan or photocopy).	3	2	**6**		
Stress. Traveller may experience stress during journey due to unfamiliarity with trip or time pressures.	• Ensure that the trip is planned, to minimise stress. • Use navigation aids such as maps and sat-nav systems where locations and routes are unfamiliar. • Allow sufficient time for the journey. • Pre-book tickets, taxis and accommodation.	2	3	**6**		
Other (State).						

Overseas Travel Risk Assessment Form Toolkit 1

Transport						
Hazard / Consideration	**Control Measures**	**Severity (S)**	**Liklihood (L)**	**Risk Score S x L**	**Risk Rating**	**Relevant**
Walking. Risk of slips trips and falls. This is considered a normal “life risk” for most people.	• For slips, trips and falls, In normal urban conditions, no specific action needed other than reasonable care. • Additional consideration is needed if ground conditions are expected to be poor or if travellers have mobility issues. • Travellers should ensure suitable footwear is worn, particularly if there is a risk of ice, snow, uneven or loose floor. • Avoid walking in unlit areas or walking alone late at night.	**3**	**3**	**9**		
Cycling. Injury due to collision with other vehicles, pedestrians, or due to potholes.	• Ensure that cycles are maintained in good condition. • Always use a helmet. • If cycling after dark, or in poor visibility, lights MUST be used. • Always ride with consideration for other road uses.	3	2	**6**		
Driving. Collision or breakdown during use of hire vehicle. Contact with authorities or criminals.	• Use only reputable car hire firms. • Inspect hired vehicles before accepting them, check tyres, brakes, oil and water levels. • Make sure there’s enough fuel for your journey. • Take a break on journeys over 4 hours, if possible share the driving. • When driving take account of adverse weather, road conditions, avoid driving at night. • Carry an up-to-date driving licence and insurance documentation. • Understand local driving practices. • Carry money for fines. Don’t give police your passport unless you have to– try to use some other form of identification. • Lock vehicles even if only left for a few minutes. • Keep the passenger doors locked while driving. Leave nothing valuable inside. Don’t wind window down fully when speaking to strangers. • Carry emergency equipment (eg fire extinguisher, first aid kit, tool kit, spare bulbs and warning triangle) in the vehicle. • Take lots of water with you if you’re driving in a hot climate. • Always leave enough room between you and the car in front to drive out if you’re approached by potential hijackers. • Don’t drink and drive. Some countries have lower limits than UK.	4	3	**12**		

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Taxi. Collision, theft, assault.	• Only use reputable taxi firms. • Seek reviews or recommendations when planning the journey. • Keep valuables out of sight. • Ensure drop offs are in well lit, safe areas. If you're not confident about driving or there's a high risk of carjacking or kidnap, hire a reliable driver. • If possible, book taxis through your hotel or a reliable local contact. • Make a note of the taxi company and the driver's name, car registration, make and colour, and the approximate fare when you book, and check them again before you get into the taxi. • Travel in a licensed taxi with a meter, and make sure the driver uses it. • Don't get into a cab if there's another passenger already there. • Taxi drivers could take criminal advantage if they see a passenger as a newcomer – act naturally and don't ask too many questions. • Always ask drivers who are to meet you at the airport to use your organisation's logo on the meeting card. (This makes it harder for other people to copy your name and try and get your attention before your official driver.) Before getting into the car, make sure they know your name and either put your luggage in the boot yourself or watch as the driver does it.	4	3	**12**		
Air travel. (commercial flights only). Failure to board plane.	• Ensure that valid passport, tickets, visa's etc are available. • Ensure the content of all cabin baggage conforms to airport security restrictions. • Travel arrangements must be made through the Combined Authority travel provider wherever possible. • Arrange airport collection where possible. • If possible ensure all transfers are booked in advance of travel.	2	3	**6**		
Other (State).				**0**		

Overseas Travel Risk Assessment Form Toolkit 1

Accommodation						
Hazard / Consideration	**Control Measures**	**Severity (S)**	**Liklihood (L)**	**Risk Score S x L**	**Risk Rating**	**Relevant**
Accommodation. Choice of poor accommodation may leave traveller more vulnerable to violence, theft, fire or ill health.	• Ensure that accommodation is in safe location and has adequate security arrangements. Preferably well-known hotel chains. • Avoid ground floor rooms. • Always lock doors, use safety chain and window locks if fitted. • Use the spyhole, if there is one, before opening the door to someone, and phone reception if you're unsure who's there. • If your room doesn't have a chain or spyhole, ask to change. • Keep important and valuable items (including computer files) in the hotel safe when you're not in your room. • Avoid keeping large amounts of cash in your room. • Get reception to call you if you have visitors and meet them in a public area rather than your room.	**2**	**4**	**8**		
Fire. Risk of injury due to fire outbreak within accommodation.	• Find the nearest fire alarm and extinguishers, and make sure you know your emergency exit route. Follow the emergency route to the final exit and make sure you can actually get out of it easily. • Be vigilant regarding fire safety management within hotel. • Always respond promptly to fire alarms and evacuate by the nearest emergency exit route.	5	2	**10**		
Food. Choice of poor restaurant may leave traveller more vulnerable to ill health. Many infectious diseases (eg cholera, hepatitis A, B and E, listeriosis and typhoid fever) are transmitted by contaminated food and water.	• Choose eating locations carefully. Avoid any that look obviously badly run or unhygienic. • Eat only food that's been thoroughly cooked and is still hot. • Avoid cooked food kept at room temperature for several hours. • Avoid food bought from street vendors. • Avoid uncooked food, apart from fruit and vegetables that can be peeled or shelled. • Boil water for drinking or brushing teeth if you're unsure of its safety. If you can't boil it, use a disinfectant tablet, a certified and well-maintained filter or stick to bottled water. • Avoid ice unless you know it's made from safe water. • Cold bottled and packaged drinks are usually safe, as long as they're sealed. Hot drinks are also usually safe.	3	2	**6**		
Other (State).				**0**		

Overseas Travel Risk Assessment Form Toolkit 1

Human Factors						
Hazard / Consideration	**Control Measures**	**Severity (S)**	**Liklihood (L)**	**Risk Score S x L**	**Risk Rating**	**Relevant**
Theft/Assault. Risk of personal assault, attack or theft of belongings.	• Be aware of the risk of theft, scams or pickpockets. • Record details of bank card numbers, issue dates, etc. and store separately both with you and at home. • Minimise amount of cash carried. Keep a small amount of money separately from your main wallet or purse. • Keep valuables secure and out of sight. • Dress appropriately to blend in to the local environment. Do not wear expensive clothes or jewellery. • Consider keeping copies of key travel documents/tickets. • Try to use well-populated carriages on trains or other modes of transport. • Be vigilant and aware of the environment and of people around. Avoid walking through areas that appear isolated or “hostile”. • Consider pre-booking if seeking a taxi at night in a strange town) Where available, “Black Cabs” licensed for on-street pickup may be a safer alternative to private hire vehicles. • Have emergency contact numbers. • Report to police if theft suspected.	**3**	**3**	**9**		
Lone working. Traveller may be alone during journeys and for long periods in hotel accommodation. Being alone may increase risk of attack. Obtaining help may be more difficult.	• Ensure mobile phone is kept charged. • Check in with a family member or Buddy regularly. • Find out how to seek emergency help within hotel accommodation. • See also Theft/Assault above.	2	3	**6**		

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Cultural differences. Potential to cause offence or break the law.	• Look up guide books or websites to find out about local traditions, customs, laws and culture. • Learn the local language or at least take a phrasebook. • Respect local customs and dress codes. For example, it's illegal to import or consume alcohol in some countries. Consider what to wear to fit in and dress appropriately, particularly when visiting religious sites, business contacts and rural communities. • Be discreet when expressing views on cultural differences – take care not to make offensive comments about customs of dress, relationships, alcohol and drugs. • Avoid haggling aggressively or for too long. In most countries where haggling is common practice, it's done with humour – remember that the discount may be significant to the seller, even if it's relatively small to you. • Ask for permission before taking someone's photograph.	2	3	**6**		
Personal differences. Traveller may have an appearance, dress style, or protected characteristic that places them at increased risk in certain cultures.	• Avoid behaviours, dress codes and activity that may be unacceptable in the locality in order to blend in. • Find out about significant cultural differences in advance of travel, the following websites/ guides may be helpful • https://www.gov.uk/guidance/lesbian-gay-bisexual-and-transgender-foreign-travel-advice • Travel guides such as Lonely Planet provide LGBT advice for most destinations - https://www.lonelyplanet.com/	4	3	**12**		
Alcohol consumption. Consumption of alcohol may impair judgement or physical abilities making individual more vulnerable to accident or attack.	• Alcohol should not be consumed during working hours unless in accordance with exceptions within the Combined Authority policy. • Avoid drinking excessively outside of working hours, particularly in unfamiliar locations. • Be aware of drinks being "spiked". Don't leave drinks unattended.	2	3	**6**		
Language/communication. Potential to cause offence.	• Look up guide books or websites to find out about local languages and gestures. • Learn the local language, take a phrasebook or translation app.	2	3	**6**		
Other (State).				**0**		

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Local Climate, Environment						
Hazard / Consideration	**Control Measures**	**Severity (S)**	**Liklihood (L)**	**Risk Score S x L**	**Risk Rating**	**Relevant**
Weather conditions. Risk of rain, snow, icy conditions or very sunny.	• Check local weather forecasts and historical data. • Assess the risk of severe weather. • Provide appropriate clothing etc. • Be aware of risk of journey disruption e.g. loss of public transport, congestion, accident, breakdown.	3	3	9		
Desert environment, hot climate, Intense sun. Risk of sunburn, Dehydration, etc.	• Avoid by prevention – hat, sunglasses, and sunblock. • Carry appropriate treatment. • Carry adequate amount of water to ensure staying hydrated. • Consider working at night or outside of the hottest times.	4	3	12		
Extreme cold climate. Risk of hypothermia, frostbite etc.	• Ensure that appropriate warm clothing is worn or available. • Carry appropriate treatment. • Carry warm drinks / food. • Minimise exposure.	4	3	12		
Geographical Events. Risk of serious harm, loss of property, being stranded, etc.	• Check whether the area to be visited is known for Earthquakes, tsunamis, avalanches, volcanic eruptions etc. • Ensure travellers are aware of what to do should they happen.	4	2	8		
Air pollution. Risk of respiratory issues	• Check whether the area to be visited has air polution issues. • Ensure appropriate PPE is provided and used.	3	2	6		
Infrastructure Failure. Risk of failure of communications and utilities, mobile phone signal, etc.	• Consider access to landlines or alternative handsets if mobile phone is lost or stolen. • Carry back-up chargers or batteries for phones or electronic devices. • Verify access to phone network or wi-fi, provide alternatives if not available. • Ensure equipment is compatible with visit location voltages and sockets. • Power cuts or interruptions to phone service could cause issues with checking in, ensure alternative arrangements are in place.	4	2	8		
Other (State).				0		

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Medical Issues						
Hazard / Consideration	**Control Measures**	**Severity (S)**	**Liklihood (L)**	**Risk Score S x L**	**Risk Rating**	**Relevant**
Pre-existing medical conditions including pregnancy. Risk of becoming unwell during trip.	• Take medical advice prior to travelling. • Carry written details of medical condition, blood group, etc. Consider using In Case of Emergency "ICE" Jewelery or mobile phone apps. • Carry a copy of any prescription and supplies of medication to last several days beyond the expected return date in case of delay. • Consider translation of information into local language. • Share details of condition with colleagues where appropriate • Notify line managers of any relevant conditions that may place you at increased risk.	**3**	**2**	**6**		
Deep-Vein Thrombosis (DVT). Risk of blood clot, throbbing or cramping pain, swelling, warm skin, red or darkened skin, swollen veins that are hard or sore. These symptoms can happen in the leg, arm or tummy dependant on where the blood clot is.	• Wear loose, comfortable clothes. • Do calf exercises at least every half hour (raise your heels, keep your toes on the floor, then bring them down 10 times. Then raise and lower your toes 10 times). • Wear compression stockings. • Walk around whenever you can. • Drink plenty of water. • Do not drink alcohol or take sleeping pills.	**4**	**2**	**8**		
Local medical facilities. Risk of poor or no treatment.	• Prior to departure identify a good standard Hospital in the area. • Identify how to access to doctors/dentists. • Ensure payment methods for medical treatment are available. • Carry travel insurance details, UK Global Health Insurance Card (UK GHIC) card, etc.	4	2	**8**		
Exposure to endemic infection or disease: Risk of illness.	• Take medical advice and arrange vaccination, inoculation, prophylaxis as appropriate. • Take any additional precautions identified e.g. hand washing, bottled water etc. • Consider the following conditions in particular: Cholera, Diphtheria, Dysentery, Hepatitis B, HIV, Japanese Encephalitis, Malaria, Meningitis, Poliomyelitis, Rabies,Tetanus, Tick-borne Encephalitis, Tuberculosis, Typhoid, Yellow Fever and Zika.	4	2	**8**		

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Minor injuries and ailments: Risk of developing more serious conditions.	• Carry basic First Aid kit and over the counter medicines (for personal use).	2	3	**6**		
Insect and animal bites. Risk of discomfort, illness and disease.	• Consider likely insect / animal issues in particular area. • Avoid by prevention – repellents, clothing, etc. • Consider use of nets in accommodation. • Carry appropriate treatments.	3	3	**9**		
Musculoskeletal injury. Risk from handling or carrying heavy items of luggage, sitting for long periods, particularly if journey is delayed.	• Avoid carrying heavy bags and be aware of injury risk when moving these from storage locations in vehicles. • Ensure luggage is securely stowed. • Use wheeled cases or luggage trolleys if there is a need to carry luggage for long distances. • Ensure that you move around periodically during long journeys.	3	3	**9**		
Other (State).				**0**		

Other Factors						
Hazard / Consideration	**Control Measures**	**Severity (S)**	**Liklihood (L)**	**Risk Score S x L**	**Risk Rating**	**Relevant**
Civil disturbance or terrorist attack. Traveller may be affected by local civil disturbance or a non-specific terrorist attack.	Although the risk is low, there is an element of threat worldwide. • Travellers should remain alert during all journeys and, where an incident has recently occurred should review the risk associated with a proposed trip to that location. • Any staff in the area where an event has occurred should contact the Combined Authority as soon as practicable to report their location and condition. • Check the Foreign, Commonwealth & Development Office (FCDO) website for up-to-date advice. https://www.gov.uk/guidance/how-the-foreign-commonwealth-office-puts-together-travel-advice • If the FCDO advises against travel to destination(s) on safety/security grounds then seek approval from HoS / Line Manager • Consider not just the country in question but also any territories as identified in FCDO pages • Reschedule visit or modify itinerary if at all feasible.	**5**	**3**	**15**		

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Leisure activities: Risk of injury with no medical insurance.	• Ensure you are adequately privately insured, the Combined Authority insurance does not provide cover for non-business related activity such as skiing, white water rafting, bungee jumping, diving. etc.	4	3	**12**		
Kidnap / abduction.	• Inform a trusted person of where you are going, who you might meet with, and when you expect to return. • Don't post details on social media. Stay in touch via direct and private means. • Keep a low profile, downplaying your nationality, avoid drawing unnecessary attention to yourself by dressing modestly, not wearing expensive jewelry, and not openly carrying valuable cameras or electronic equipment. • Avoid alcohol it can impair your judgment and make you less alert to your surroundings. Expat locations are often watched by criminals looking for potential victims, who they know may be intoxicated when they leave the premises, especially late at night. • Carry a fully charged mobile phone. • Avoid public transport, hire a car or use an official taxi service. Don't flag down a ride in the street. • Avoid setting patterns, take different routes, travel at different times, eat at different places, on long trips change hotels.	5	3	**15**		
Other (State).				**0**		

Overall Rating									
When calculating the overall risk rating the following rules apply, **1. Calculate the total number of low, medium and high risk hazards fill in the relevant boxes, any high risk hazard will make the overall rating high risk.** **2. If there is 1 Red High Risk Hazard you must start the scoring at 16 and add 1 to the score for each additional 4 reds.** **3. If there are no Red Hazards and Green Low Risk Hazards have the highest total start the scoring at 1 and add 1 for each additional 5 greens.** **4. If there are no Red Hazards and Amber Medium Risk Hazards have the highest total start the scoring at 9 and add 1 for each additional 7 ambers.** **5. If there are no Red Hazards and Amber Medium Risk Hazards and Green Low Risk Hazards are Equal score 9.**									
Total No of Green Low Risk	22	**Total No of Amber Medium Risk**	14	**Total No of Red High Risk**	0	**Overall Rating**	**6**		36 Total

Overseas Travel Risk Assessment Form Toolkit 1

Sign-Off			
I have reviewed this risk assessment I am satisfied that suitable control measures are in place to manage foreseeable risks.			
Signed (Line Manager):		**Date:**	
Print Name:			

West Yorkshire Combined Authority | Tracy Brabin Mayor of West Yorkshire

Travel & Expenses Policy

[redacted] (Head of Strategic & Corporate Finance)

February 2026

Contents (Clickable)

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Document Control

Current Document Status			
Version	3.4	**Approving Body**	Corporate Board
Issue Date	1st April 2026	**Date of Formal Approval**	13 March 2026
Responsible Officer (Policy Owner)		S.40 Personal Information (Head of Strategic & Corporate Finance)	
Title		Travel and Expenses Policy	
Working Title		Travel_and_Expenses_Policy	
Unique document ID reference		TBC – for records management purposes	
Document Location (e.g. network drive)		*Finance Team – Finance > Financial Policies and Procedures > Finance Policies and Regulations > Travel & Expenses > 2025 T&E review*	
Document Retention Period		7 Years	

Version History (Amendments- Major X.0 or Minor 0.X)			
Date	**Version**	**Reviser**	**Comments**
Nov 25	3.2	S.40 Personal Information	Initial Creation
Jan 26	3.3	S.40 Personal Information	Add Appendix G (Foreign Currency) Removal of Car Hire as an option
Feb 26	3.4	S.40 Personal Information	Feedback from Corporate Board + Branding

Review History - Ongoing			
Review Period		1 Year	
Date Reviewed	**Reviewed By**	**Next Review Date**	**Comments**
18 February 2026	S.40 Personal Information	November 2027	

1. Policy Purpose

1.1 This policy outlines West Yorkshire Combined Authority (WYCA's) approach to business travel and expense reimbursement. It supports WYCA's commitment to **clean growth** and **environmental sustainability**, while ensuring that employees, elected members, volunteers, contractors and non-executive directors are reimbursed for **eligible and reasonable expenses** incurred during official duties—without incurring personal financial loss.

1.2 All travel must have a **clear business purpose**. Before undertaking any journey, its **necessity**, **cost-effectiveness** and **mode of transport** must be properly assessed and approved in line with WYCA procedures.

Where a meeting could reasonably be held virtually, this option must be considered first. In-person attendance should only be proposed where it provides **significant additional value**—for example, where face-to-face interaction is essential to build or maintain key relationships, support effective collaboration, or achieve outcomes that cannot be delivered remotely.

Such decisions must be **assessed on a case-by-case basis**, with the **rationale for attending in person clearly documented and approved prior to travel**.

1.3 The policy promotes **value for money**, **transparency** and **compliance** with financial regulations. It also encourages the use of **sustainable travel options**, as illustrated in **Figure 1: Sustainable Travel Hierarchy**, which ranks modes of transport from least to most environmentally friendly.

Figure 1: Sustainable travel hierarchy



2. Principles & Governance

2.1 All travel and expenses must be **necessary**, **reasonable** and **cost-effective**.

2.2 Claims must be supported by **valid receipts** and submitted within 3 months through CiA. **Reception Service Team** will book UK only Travel once a form as been submitted through CiA with an attached email approval by the precise budget holder.

2.3 WYCA is committed to reducing its carbon footprint and encourages **sustainable travel** options.

2.4 All claims are subject to internal and external audit and must comply with HMRC guidelines and financial regulations.

2.5 WYCA is committed to reducing its carbon

2.6 Fraudulent claims will be investigated and may result in disciplinary or legal action.

2.7 Compliance with this policy is mandatory and monitored regularly.

2.8 The potential tax implications are correct as at the time of writing. Should HMRC rules change then those rules will take precedence over this policy.

3. Related Policies & Strategies

3.1 Staff Code of Conduct policy.

The Travel & Expenses Policy governs how staff spend public money, behave while travelling for work, and represent the organisation externally. **The Code of Conduct** underpins all these expectations.

3.2 Health & Safety - Business Trips policy.

The Travel & Expenses Policy governs ***how*** staff travel and what they can claim. The Health & Safety Business Trip Policy governs ***how they stay safe*** while travelling for work.

3.3 Place & Environment Sharepoint Site.

The **Place & Environment Directorate** sets strategic priorities that directly influence ***how*** and ***why*** staff travel—particularly around **sustainability, climate commitments, project delivery and partnership work**.

4. Authorisation & Responsibilities

4.1 All officers are expected to comply with the policy.

4.2 Travel must be authorised in advance by the appropriate line manager or budget holder.

4.3 Claimants are responsible for ensuring accuracy and completeness of all claims submitted via CiA.

4.4 Managers must verify and approve claims in CIA before submission to Finance.

4.5 The Finance Team will provide advice on the policy and ensure clear procedures and guidance are in place.

4.6 Any exceptions to this policy must be agreed in advance and receive formal preapproval from a Director (or Section 73 Officer for Chief Executive or Monitoring Officer).

5. Policy Statement

5.1 The overall policy is aimed at promoting limited business travel for officers where possible but, where travel is necessary, to provide clarity on circumstances where journeys are approved to be undertaken and the rates and type of claims to be reimbursed. Staff should not financially benefit from the expenditure claimed.

5.2 Before embarking on a journey, officers must satisfy themselves that they are taking the most sustainable option. The options to be considered are in the following order:

- Can the meeting be held by telephone, email, Teams etc.?
- Can I walk or cycle to the meeting? NB: Please see details on Appendix D for authorised bike users.
- Can I use public transport (bus, rail)?
- If a car is necessary, before using your own private vehicle you should check if you can car share. Car Hire is reviewed on a case by case basis.
- If your own private car is required, then you must ensure you are assigned as a 'Car User', have the appropriate business use insurance in place and have completed the 'Self Declaration Car User' form and submitted to Legal before embarking on any journey.
- The last resort is the use of a taxi.

5.3 It is the responsibility of all employees and their line managers to ensure that, if a business journey is required, then the most sustainable journey method is prioritised whilst also considering the most cost-effective means of travel and where applicable, appropriate accommodation.

5.4 Health and Safety are important considerations. No officer should put themselves at risk in relation to journeys and if required should incur costs outside policy (e.g. book / use a taxi journey late at night if safety is a concern).

6. Travel Guidelines & Claims

6.1 Regarding what can be claimed / reimbursed, the following applies in relation to travel and expenses reimbursement when travelling as part of your work responsibilities. It does NOT relate to your normal journey to your default work location.

6.2 Public Transport (Bus/Rail):

Use of public transport is encouraged. Travel should be standard class unless exceptional circumstances apply.

In relation to travel within the West Yorkshire boundary, no claims are to be made as all travel is covered by the MCard available to all staff.

A limited number of Northern Rail travel passes can be reserved via the **Reception Service Team**. These passes must be booked in advance and returned within a couple of days due to the limited quantity held.

For all other rail journeys out of the West Yorkshire boundary the following applies:

- Rail tickets should be purchased in advance through CiA.
- No 'open' tickets will be provided, and officers must endeavour to plan journey start/end times to accommodate their schedules.

NB: Under exceptional circumstances open tickets and / or first class can be approved by Head of Service with written justification provided.

If an onward journey is required from the train station, officers must still choose the most sustainable route. These are in the following priority order - on foot, public transport and taxis.

In the latter two cases costs can be reimbursed by submitting an expense claim through CiA.

6.3 Private Vehicles / Taxi:

If public transport is not an option for the journey, then the following can be used in this priority order:

- Own private car – only available if assigned as an authorised car user (see details at **Appendix D**)
- Taxi

Private mileage can be claimed / reimbursed in line with the Rate Card (upper limits~) attached at **Appendix A** and in line with the Travel and Expenses claiming procedures attached at **Appendix B**.

VAT receipts should be provided where applicable to enable recovery.

Car parking, congestion clean air zone charges and tolls will be reimbursed for business car journeys subject to a receipt being submitted.

Taxi fares can be reclaimed on production of a receipt and submitted as part of the monthly claiming procedures attached at **Appendix B**.

NB: The CA will NOT reimburse fines incurred from parking or any other motoring offences or infringements.

6.4 Other Travel

Overseas Travel:

- Risk assessments and travel insurance are mandatory.

- Advantage should be taken of reduced fares and deals and based on economy class.
- Bookings should be made well in advance to avoid late increases in price due to availability.
- Non-UK travel must be booked by the individual on a Corporate Purchasing Card.
- Onwards journeys from Air / Seaports should still follow the most sustainable options available to officers.

Note that Director approval is required for air/sea travel within the UK

6.5 Subsistence, Accommodation and Other Claims

Claims for meals and other items are generally allowed only by exception and must be supported by itemised receipts.

The following are example scenarios where reimbursement can be claimed:

- If an officer is working outside normal 'core' working hours of 7am – 7pm and has incurred an additional cost.
- If an officer is on a business journey outside West Yorkshire that involves both an early and late start / return journey time, outside the normal 'core' hours of 7am-7pm.
- If an officer has booked a hotel for a business trip an evening meal can be claimed as overnight expenses (see claim rate card) and a breakfast if not part of the hotel booking itself.
- Accommodation for a business trip should be booked via CiA.
- Foreign currency for business use abroad will be provided by submitting an Employee Request Form – Foreign Currency (**Appendix F**).

The rates and claim procedure are attached at **Appendices A** and **B.**

For overnight stays an officer can claim overnight expenses. In these circumstances, claims for costs incurred can be reimbursed within the maximum rate approved (subject to receipts being provided). See below in relation to alcohol.

6.6 Alcohol

The CA has an **Alcohol and Substance Abuse Policy** which prohibits the drinking of alcohol during working time/ working under the influence of alcohol.

Please see the full Alcohol and Substance Abuse Policy for details.

No alcohol can be claimed on expenses at all, under any circumstances.

6.7 Hospitality

Officers are not expected to incur costs directly for hospitality events arranged for external partners / stakeholders. If you are planning to host an event, prior authorisation must be obtained from the relevant Head of Service / Executive Director to agree the amount to be spent, and normal procurement rules will apply.

Only in exceptional circumstances will an officer incur expenses directly in relation to hospitality and the expectation is that this would only be low value items. Officers can claim back these costs with line manager approval.

6.8 Other Reimbursable Expenses

- Parking fees, congestion charges, tolls, visa costs, and necessary vaccinations may be claimed.
- Mobile data or Wi-Fi costs incurred for business purposes may be reimbursed.
- Conference and training fees must be pre-approved and supported by documentation.

6.9 Non-Reimbursable Expenses

The following are examples of expenses that will **NOT** be reimbursed:

- Personal items or gifts
- Leisure activities
- Fines, penalties, or charges due to negligence
- Costs incurred by accompanying persons
- Personal accommodation upgrades or extras
- Team meeting incidentals (Confectionary)

Note: Food or biscuits should not be purchased for internal or external employee meetings (including managers or directors). Teas and coffees for meetings are at the individual's personal expense.

6.10 Professional Fees

The employee's Role profile must specify that a professional membership is required for the role so annual fees can be reimbursed.

7. Training

7.1 No specific training is required around this policy, though the initial policy launch and future revisions will be communicated via usual routes.

7.2 Processes and procedures (Scribe Guides) are available on the Intranet /Finance pages.

7.3 Advice and guidance should be sought from line managers initially and then from the Finance Team if further information needed.

8. Processes & Procedures

8.1 Processes and procedures are available on the intranet and are detailed at **Appendix B**.

8.2 A summary of the procedures is as follows:

- Claims are approved by line managers and submitted on a monthly basis by the deadline provided.
- Claims must be made via the CiA System with full details of the business journey provided.
- Any claims submitted that are over 3 months old will not be reimbursed unless supporting evidence for the delay can be provided by both the officer and line manager.

8.3 Use of Cash & Gift Cards:

To support transparency, security and efficiency, the organisation aims to minimise the use of cash for low-value incidental expenses.

Cash payments (£50 maximum limit) should only be used in exceptional circumstances where no alternative is available. For activities such as focus groups or public engagement sessions, the use of pre-paid gift cards or vouchers is strongly encouraged instead of cash.

Gift cards provide a safer and more auditable method of reimbursement, reduce administrative burden, and align with best practice in public sector financial management. All gift card purchases must be authorised in advance and recorded in accordance with the organisation's financial controls.

9. Impact Assessment

9.1 An Equality and Diversity assessment has been undertaken on both the policy and associated procedures and is attached at **Appendix C**.

9.2 Health & Safety considerations have been considered for this policy.

9.3 No concerns have been raised as the policy allows for expenses to be incurred outside policy if an Equality, Diversity or Health & Safety matter arises.

10. Privacy Notice – Data Protection

10.1 All claims and personal details are retained in the payroll systems files and access is limited to approved officers in the Combined Authority. When managing claims for expenditure in relation to travel or subsistence, the Combined Authority processes personal data collected in accordance with its employee privacy notice. Data collected from the point at which the employee submits a claim is held securely and accessed by, and disclosed to, individuals only for the purposes of managing the verification and payment of such claims and for other legitimate processing purposes as set out in the employee privacy notice.

10.2 Inappropriate access to, or disclosure of, employee data constitutes a data breach and must be reported immediately in accordance with the Combined Authority's **Data Protection & Confidentiality Policy**, which includes guidance on reporting data security incidents. Such actions may also constitute a disciplinary offence and will be dealt with under the Combined Authority's **Disciplinary Policy**.

10.3 The retention of these records is governed by an approved Retention Policy that includes a date destroying records at a future date.

11. Policy Review & Update

11.1 The Combined Authority reserves the right to amend the details of this policy as required following consultation with relevant parties. This policy will be monitored and reviewed on an annual basis, to ensure that it meets the needs of the Combined Authority and ensure compliance with relevant legislation.

The Head of Strategic & Corporate Finance is responsible for maintaining, updating and seeking approval of the policy.

Appendix A – Rate Card (Upper Limits)

Rates – Proposed Effective Date: 1 April 2026

Mileage	First 10,000 miles	Above 10,000 miles
Cars & vans	**45p**	**25p**
Electric cars	**45p**	**25p**
Motorcycles	**24p**	**24p**
Bikes / cycles	**20p**	**20p**

Mileage rates unchanged – they already match HMRC's tax-free AMAP rates.

https://www.gov.uk/government/publications/rates-and-allowances-travel-mileage-and-fuel-allowances

Meals / Subsistence	Proposed 2026 Rate
Breakfast	**£ 11.00**
Lunch	**£ 14.00**
Tea / light refreshment	**£ 6.00**
Dinner	**£ 21.00**

Meal allowances raised by ~ 27 % to reflect cumulative inflation since 2020.

Overnight / Lodging	Proposed 2026 Rate
Out-of-Pocket (overnight stays)	**£ 25.00**
Bed & Breakfast (outside London)	**£ 125.00**
Bed & Breakfast (London)	**£ 185.00**

Overnight ceilings raised broadly in line with the 25–27 % rise in hotel and service costs.

Notes

- Mileage limits remain as per HMRC guidance to keep payments tax-free.
- Meal & lodging ceilings rounded to practical numbers for receipts-based claims.

Always retain receipts where required (overnight stays, meals over allowance, etc.).

Appendix B – Claiming & Booking Procedures

Claiming Procedure

We hope we have made the claims process as easy as possible for you. The official expense claim process can be found in CiA via the *Accounts Payable* screen.

A Scribe Guide is available on the Intranet /Finance pages

Expenses claim forms must be completed through CiA by the claiming officer with attached approval by their line manager/budget holder.

Employees must take care to ensure their claims are legitimate and be aware that any deliberate falsification of expense claims may constitute **Gross Misconduct** under the **Disciplinary Procedure**. It is a manager's responsibility to ensure their staff understand the Policy and Guidance, particularly in relation to mileage claims and that they understand the relevant claims procedures.

Managers are required to be satisfied before authorising any expenses claim that they are compliant with the Policy and appropriate. If in any doubt then checks should be carried out before authorising any claim as authorisation of fraudulent claims may also lead to disciplinary action.

NB: Line managers have overall responsibility to ensure journeys are necessary and claims are valid / appropriate. No receipt means No Reimbursement.

VAT Receipts are required to support all expenses claims, including petrol receipts that would cover any car journeys undertaken.

With proper procedures in place, managers should only be authorising expenditures they were aware would / may be incurred.

If two or more officers are travelling together, then normally each should pay their bill separately. If a single payment is more appropriate, the more senior post holder present should pay and claim reimbursement.

It is important to apply sufficient scrutiny to expense claims. The following basic questions can help expedite the approvals process:

- Has the money been spent?
- Was the expense necessary?
- Was the level of expenditure reasonable and in line with the approved rates?
- Does it fall within the boundaries of this policy?
- Is it recorded accurately and with sufficient detail to justify reimbursement?

Each answer to the above must be '**YES**' before the claim is processed.

Expenses are paid as part of the weekly payment run every Wednesday and will include claims submitted by 5pm on Tuesday. Claims submitted after this will be paid in the next weekly payment run. Only by exception will claims that are more than 3 months old be paid.

Travel Booking Procedure

In the first instance, the form should be completed via CiA, approved by Manager/Budget Holder and then **Reception Services Team** can book UK only travel requirements.

Where this is not possible or appropriate e.g. due to the last-minute nature of the booking, permission may be given by the Head of Service or Department Manager for a booking to be arranged by an appropriate member of the department.

The least preferred option is to make bookings directly yourself and claim the expenses as this may not enable you to take advantage of preferred rates.

For large event attendance, where the situation involves external stakeholders, an appropriate member of the relevant department will coordinate the arrangements and may place the bookings in line with this policy.

If appropriate and cost effective, the decision may be taken for complex travel arrangements to be outsourced to an external travel specialist.

At the point of booking, other important information will be required e.g. the correct times of travel and where required any seating/underground requests. Mistakes made on an original booking can lead to costly admin fees or increased fares.

Travel Insurance

Please contact the **Legal Services Team** to ensure that you have our latest travel insurance details.

Foreign Currency

The Finance Team does NOT hold any foreign currency.

Currency must be ordered using **Employee Request Form – Foreign Currency (Appendix F)**

Foreign currency requests should be made at the time of booking travel to allow for lead times in obtaining the currency.

Currency is not guaranteed to be available if the request is made fewer than 7 working days before the date of travel.

Receipts for all spend must be obtained and, along with any remaining cash, must be returned to the Finance Team after your trip.

Where sufficient funds are not available or payment has been made by credit card to cover expenditure in a foreign currency, the value to be claimed must be the Sterling equivalent based on the actual exchange rate if known, and evidence provided.

The traveller is responsible for ordering any foreign currency required for personal expenses during the trip.

Appendix C – Equality & Diversity Impact Statement

The Combined Authority uses the **Equality Impact Assessment** (EIA) screening tool to ensure that all policy changes are developed and implemented with due regard to the Public Sector Equality Duty. This tool provides a structured way to identify any potential impacts—positive, neutral, or negative—on individuals and groups with protected characteristics. It supports transparent, fair decision-making and helps ensure that our policies contribute to equality, accessibility, and inclusive practice across the organisation.

For the revision of the Travel & Expenses Policy, we completed the **Stage 1 Initial Screening Assessment**, which is designed to determine whether a more detailed **Stage 2 Assessment** is required. The screening confirmed that the changes relate to revising the existing policy to improve clarity, promote sustainable travel, and ensure consistency in how claims can be made by all staff.

The **Stage 1 Assessment** generated an **Impact Score of +6** and a **Risk Score of 0**. These scores indicate that the proposal carries **overall positive impacts** with **no areas of identified equality risk**. Under the EIA methodology, a positive impact score at or above zero and a non-negative risk score mean that the policy is not considered discriminatory and **does not require a Stage 2 full assessment**. The results show that appropriate consideration has been given to equality implications within the scope of the policy revision.

The screening process identified several **positive impacts** for specific protected characteristic groups. These arise from the policy's built-in flexibility, which enables staff to make travel and expense claims outside standard rules where the usual requirements could otherwise create a disadvantage. The groups benefiting from these improvements include:

- **Disabled employees**, who may require alternative arrangements where standard policy provisions have an adverse effect.
- **Pregnant employees**, where health, comfort, or safety needs require a more flexible approach to travel or expense reimbursement.
- **Employees affected by sex-related health and safety considerations**, where individual circumstances may justify claims outside the normal policy requirements.

All other protected characteristic groups, as well as residents and service users, were assessed as having a **neutral impact**, meaning that the policy changes do not create differential outcomes for these groups.

In addition to the protected-characteristic impacts identified above, the assessment also considered a number of wider equality and inclusion factors related to the practical operation of the travel and expenses process. These included the **accessibility of the expense-submission system** for employees with disabilities, such as the need for accessible interfaces or alternative submission methods where required; the potential for **travel expectations to disproportionately affect staff with mobility impairments or those with caring responsibilities**, particularly where rigid arrangements may cause disadvantage; and the importance of **flexible approaches to accommodate religious, cultural, or dietary requirements** during business travel. Consideration was also given to the **timeliness of reimbursements**, recognising that delays can disproportionately impact lower-paid employees.

The revised policy and processes provide sufficient flexibility and mitigation to address these issues, supporting fair and inclusive treatment for all staff.

In summary, the **Stage 1 EIA** screening demonstrates that the revised **Travel & Expenses Policy** promotes fairness, supports inclusive practice, and contributes positively to equality outcomes.

As no negative or disproportionate impacts were identified, and because both the impact and risk scores fall within the threshold indicating low concern, the screening confirms that no further assessment is required. The policy can therefore proceed with confidence that equality considerations have been appropriately addressed.

Appendix D – Authorised Car, Motorbike & Bicycle User Procedures

Bicycles

We now have a new Bike Pool available to staff if required.

All staff using any bicycle whilst travelling for business purposes must give due consideration to appropriate safety measures which might include wearing a cycling helmet, high visibility clothing and lights during their journey.

Additionally, safety measures must be considered by staff when carrying heavy and awkward equipment whilst using a bicycle on a business journey.

Bicycle journeys should be pre-approved by line managers, and time and cost implications considered.

The attached declaration form needs to be completed and returned and authorised annually.

USE OF PERSONAL **BICYCLE** FOR BUSINESS PURPOSES (ANNUAL DECLARATION)

Application and self-declaration certification form

Leeds City Region needs to lower its greenhouse emissions by 14.5% year-on-year to achieve our aim of becoming a net zero carbon economy by 2038 at the latest. From tackling air quality and congestion to combatting physical inactivity and obesity, enabling more people to travel by bike, as well as on foot, is part of the solution to many of the challenges we face. Using a bike can also be the easiest and quickest way to make a short journey, including travel to and from meetings.

Employees using their own bike for business purposes must complete this application and self-declaration certification form before doing so.

PART A – to be completed by Employee

Name:	
Address:	
Job Title:	
Work Phone:	**Mobile:**
Email:	

PART B – to be completed by Employee

Are you a proficient bike user, and is your bike fit for purpose and in good working order?	**Yes/No**
What will be the main purpose of your bike journey?	
Are you medically fit to ride a bike?	**Yes/No**

DECLARATION

I declare the information I have provided on this form is true and complete. I agree to inform the Combined Authority of any changes to the information I have given.

I agree I am responsible for complying with all aspects of the Highway Code and I am personally liable for any penalties or convictions incurred as a result of failing to abide by the law.

I confirm I will give due consideration to appropriate safety measures, which might include using a helmet, hi-vis clothing and lights.

I understand if I have failed to provide accurate information, the Combined Authority will not accept liability.

Signed: **Date:**

This application and self-declaration certification form must be completed on an annual basis from when your Head of Service (HoS) signs and dates the application.

PART C – to be completed by the Head of Service

Consideration has been given to use of a bike for short journeys and is suitable for approval.	**Yes/No**
I approve use of a bike for these journey requirements.	**Yes/No**
HoS approval – Name: Signed: Date:	

Please scan and email completed forms to stephanie.thewlis@westyorks-ca.gov.uk.

West Yorkshire Combined Authority | Tracy Brabin Mayor of West Yorkshire

USE OF PERSONAL VEHICLES FOR BUSINESS PURPOSES

Application and Self-Declaration Certification Form

Employees using their own vehicles for West Yorkshire Combined Authority ('Combined Authority') business purposes must complete this Application and Self-Declaration Certification Form.

At the Combined Authority, we expect everyone to travel using the best value for money option available for business purposes. We encourage everyone to maximise the use of their MCards and public transport over private vehicles.

Prior to seeking approval to use a private vehicle, consideration must be given to other modes of transport:

- Staff MCard and public transport
- Organisational Pool Cars
- Travel Pass (which can be obtained from the facilities team)

Use of your own vehicle should be a last resort.

Private Vehicles: Mileage claims must be based on the shortest reasonable route and claimed at HMRC-approved rates. Car sharing is encouraged.

PART A – to be completed by the Employee:

Name:	
Address:	
Job Title:	
Work Telephone:	Mobile:
Email:	Driving Licence No:
Vehicle Reg:	Driving Licence Expiry Date:

PART B – to be completed by the Employee:

Have you given full consideration to the use of your MCard, public transport and the other modes of transport outlined above before use of a private vehicle?	**Yes/No**
Please detail why use of your MCard and public transport and the other options are not feasible for these journeys:	
What are the duties for which you require to use your own transport?	
Estimated monthly mileage and approx. number of journeys per month:	
Geographical range of your duties:	
Do you have a full, clean and valid, UK driving licence? If NO, please give details below:	**Yes/No**
Do you have current or pending driving convictions, suspensions or prosecutions? If YES, please give full and accurate details below:	**Yes/No**
Does your vehicle have a current MOT certificate or V5 if your car is under 3 years old? If NO please give details below:	**Yes/No**
Does your vehicle insurance cover you **for business use?** (Please note that Social Domestic, Pleasure and Commuting to and from your place of work, **<u>will not</u>** cover you for business use). If **NO** please contact your motor insurers and request they add this to your policy. Please be aware that your insurers may charge you for amendment to your policy.	**Yes/No**
Are you medically fit to drive?	**Yes/No**

DECLARATION

I declare that the information that I have provided on this Self Declaration Certification Form is true and complete. I declare that I have given first consideration to the use of my MCard and public transport and have considered all other transport options when planning my journeys before the use of my own vehicle. I accept that the Combined Authority may contact the DVLA to validate any of the information given. I agree to inform the Combined Authority of any changes to the information I have given.

I agree that I am responsible for complying with all aspects of road traffic law and I will be personally liable for any penalties or convictions incurred as a result of failing to abide by the law.

If I have failed to provide accurate information, the Combined Authority shall accept no liability in relation to events caused as a result of that failure.

Signed: Date:

This Application and Self Declaration Certification Form **must** be completed on an annual basis from the date your Head of Service signs and dates the application.

The Combined Authority reserves the right to request sight of driving documents at any given time.

Please refer to the relevant Privacy Notice related to this process here

PART C – to be completed by the Head of Service

First consideration has been given to use of staff MCard and public transport over private vehicles and other outlined modes of transport have also been considered:	**Yes/No**
I agree that public transport or a pool car is not feasible for these journeys for the following reasons: • • I approve use of a private vehicle for these journey requirements:	**Yes/No**
Head of Service Approval – Name: Signed Date:	

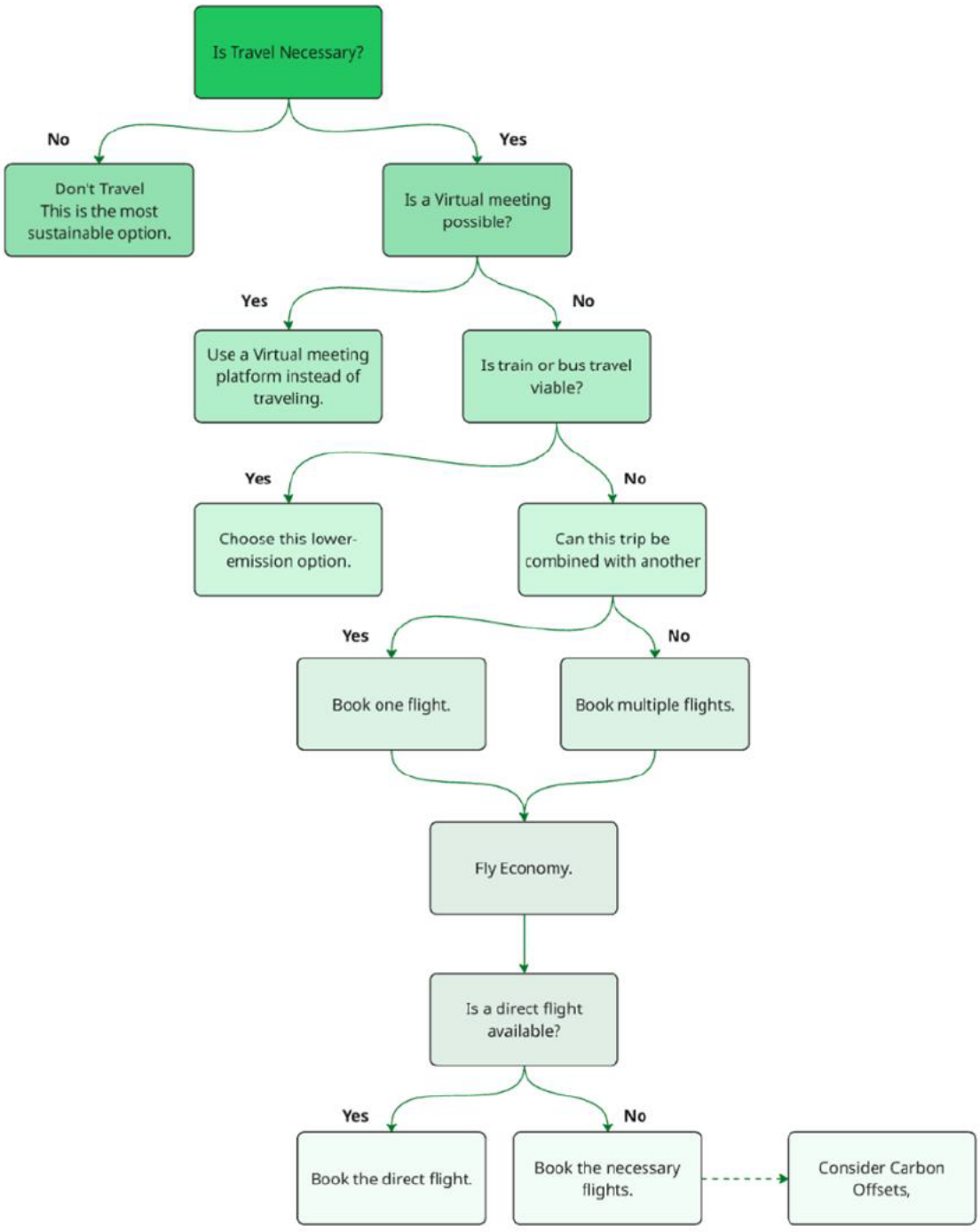
Once completed, please scan and email to stephanie.thewlis@westyorks-ca.gov.uk.

West Yorkshire Combined Authority | Tracy Brabin Mayor of West Yorkshire

Appendix E – Business Travel Decision Tree

Where a meeting could reasonably be held virtually, this option must be considered first. In-person attendance should only be proposed where it provides **significant additional value**—for example, where face-to-face interaction is essential to build or maintain key relationships, support effective collaboration, or achieve outcomes that cannot be delivered remotely.

Such decisions must be **assessed on a case-by-case basis**, with the **rationale for attending in person clearly documented and approved prior to travel**.



Appendix F – Employee Request Form – Foreign Currency

Please submit this form at least **seven working days** before you need to collect foreign currency.

- Complete all fields in the table below and provide as much detail as possible.
- Attach this form to an email **along with approval from your Budget Holder**.
- Foreign currency is issued on the understanding that all receipts will be retained, and a full reconciliation of expenditure is submitted to Finance on the correct form within **seven days of returning to work** along with any remaining cash.
- All spending will be reviewed, and any items that fall outside the Travel & Expense policy must be repaid by the employee.

Employee Name:	
Directorate:	
Cost Centre Coding for Spend:	

Date of Travel:	
Destination (Country) of Travel:	
Currency Type:	*E.g. Euros -*
Reason for Travel:	*E.g. Meeting title / training -*

Value of Currency (in GBP):	**£**
Preferred Denominations:	*E.g. Mixture / all small value notes -*
Preferred Office Collection Date:	

Budget Holders Name:	
Date of Approval:	

Please ensure this form is completed in full and submit to finance@westyorks-ca.gov.uk along with an email from your budget holder to support the request

West Yorkshire Combined Authority | Tracy Brabin Mayor of West Yorkshire

Find out more

westyorks-ca.gov.uk

West Yorkshire Combined Authority

Wellington House
40-50 Wellington Street
Leeds
LS1 2DE

West Yorkshire Combined Authority | Tracy Brabin Mayor of West Yorkshire

All information correct at time of writing