

## **HUMAN RESOURCES**

# **Staff Travel Policy**

Staff Travel

## CONTENTS

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|  | Page |
|--|------|
| 1. General principles.....                         | 3    |
| 2. Essential Car Users.....                        | 3    |
| 3. Travel for other employees (non-essential)..... | 4    |
| 4. Motorcycle allowances.....                      | 6    |
| 5. Bicycle allowances.....                         | 6    |
| 6. Staff car parking permits.....                  | 6    |
| 7. Assisted purchase scheme.....                   | 6    |
| 8. Season ticket loans.....                        | 7    |
| 9. Parking and Congestion Charges.....             | 7    |
| 10. Car Audits.....                                | 7    |
| 11. Authorisation and claims.....                  | 8    |
| Appendix A: Appeal Process.....                    | 9    |

## **I. General Principles**

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- 1.1 In determining the means of travel for transport in connection with work, employees and managers must have regard to cost, time, service and environmental considerations
- 1.2 Where employees are expected to travel for work purposes, they and their managers must consider whether the journey is necessary and determine the most appropriate means of travel. In particular, managers should question whether car travel is required and whether public transport is more beneficial from an environment or cost perspective.
- 1.3 Managers should also regularly review employee's work travel patterns within the context of service efficiency, cost and environmental implications
- 1.4 This policy applies to all employees of Royal Greenwich, except those employed in schools under the control of Governing Bodies, for whom policies adopted by the Governing Body will apply.
- 1.5 The policy does not apply to agency staff and consultants.

## **2. Essential Car Users**

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### **2.1 Criteria**

- 2.1.1 The duties of Essential Car users are of such a nature that it is essential for them to have a vehicle at their disposal whenever required. In order for a post to be given Essential Car User Status, the post must meet one or more of the criteria outlined below.
  - A. Significant emergency response work which is an integral part of the duties of the post
  - B. Regular travel at hours/to places where no public transport is available
  - C. Regularly transporting customers or heavy/bulky equipment
  - D. Disabled employees where required (as reasonable adjustment) to enable travel to work and work visits
  - E. The duties of the post require a significant proportion of multiple journeys each week, which would mean that the employee would become prohibitively unproductive if public transport were to be used

- F. The employee is likely to be at significant personal risk if they are unable to use their car to carry out their duties

## **2.2 Payment**

- 2.2.1 Essential Car users can claim 53.9p per mile (2013/14) which is based on the AA annual motoring costs survey. Employees **must** also ensure that they are covered for Full Business use by their insurance company, otherwise their insurance may be invalidated.

## **2.3 Review of Essential Car users**

- 2.3.1 Essential user status is attached to the post and is not a personal entitlement. Chief Officers will ensure that all the posts with Essential Car user status are reviewed

- A. At least annually
- B. Where the duties of the post change such that the post no longer meet any of the eligibility criteria

- 2.3.2 Any new or vacant post must have its car user status reviewed (if it currently has essential user status) prior to recruitment to the post.

- 2.3.3 Where it is proposed to withdraw Essential User Status, the employee must be notified by their Director and given 1 month's notice. There are no protection arrangements. Employees have a right of appeal to their Chief Officer if Essential User status is being withdrawn (See Appendix A)

## **2.4 Car users for Chief Officer**

- 2.4.1 Chief Officer traveling whiles on Council Business will be required to provide a suitable motor vehicle for use on the Royal Borough's business and will not be entitled to reimbursement for travel inside the Royal Borough of Greenwich boundary.

- 2.4.2 Chief Officer will be entitled to reimbursement of the actual excess cost of authorised travel outside the Royal Borough of Greenwich in accordance with current Royal Borough policy. The payment will be paid in accordance with current Council Essential Car payment.

### **3. Travel for all other employees (non essential)**

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#### **3.1 Travel within the Borough**

3.1.1 Employees who are not Essential Car users and need to travel to carry out their duties within the Borough can either use their own car or use public transport. Where an employee proposes to use their own car for travel, they **must** ensure that they are covered for Full Business use by their insurance company, otherwise their Insurance may be invalidated. If your Insurance certificate does not cover you for business use you must use Public Transport.

3.1.2 Whether the employee uses their own car or public transport, employees will only be able to claim the Oyster pay as you go Bus Rate (£1.0 per journey for 2014). There is a maximum daily cap on Oyster bus rates of £4.40 irrespective of the number of bus journeys undertaken. Therefore employees using buses or their own car for work travel within the borough will only be able to claim a maximum of £4.40 per day

3.1.3 Example 1 – employee goes from office to 1<sup>st</sup> visit, then direct onto second visit, then back to office. Total number of journeys = 3, Total claimed = £4.35

3.1.4 Example 2 – employee goes from office to 1<sup>st</sup> visit, then direct onto second and third visit, then back to office. Total number of journeys = 4, Total claimed = £4.40 (because oyster card caps fare at this amount).

3.1.5 Employees using trains for work travel within the borough will be able to claim the Oyster rate for the journey.

3.1.6 Employees using public transport to carry out their work duties will be expected to purchase their own Oyster card.

3.1.7 Employees are able to use Oyster and contactless payment cards to travel. Where contactless payment cards are used, employees must be prepared to provide evidence of the travel, for example printing off their online bank statement etc. Contactless payment cards are plastic smartcards used for travel payments.

#### **3.2 Travel outside the borough**

3.2.1 Where employees travel outside the borough for work purposes, they will be expected to use public transport. Managers must also ensure the most cost effective method for the journey is undertaken. Use of a car as an alternative to public transport should only be agreed in very exceptional circumstances by the employee's line managers e.g where public transport is not available or practical, where a number of employees are travelling together to the same location and therefore it would be cheaper than public transport.

- 3.2.2 When using trains, employees will be reimbursed the Oyster card rate or the standard/2<sup>nd</sup> class fares. Where a car is being used, employees can claim the mileage rate for essential users (currently 53.9p per mile – 2012/13). In these circumstances managers should see evidence that the driver has appropriate insurance cover for business use.
- 3.2.3 Where Oyster cards or contactless payment cards are used to travel outside the Borough, the employee **must** provide receipts or evidence of the travel, for example oyster travel record prints or online statements. Employees that fail to provide such evidence without reasonable reasons will not receive their reimbursement.
- 3.2.4 Oyster cards used to travel outside the Borough must register their Oyster card with TFL in order to produce a travel record.

#### **4. Motorcycle Allowances**

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- 4.1 Postholders with Essential user status who use a motorcycle to carry out their work travel will be able to claim 50% of the essential mileage rate (i.e. 27p per mile – 2013/14). There is no lump sum payment.
- 4.2 Other employees who wish to use a motorcycle for work travel will be able to claim 50% (i.e. 72p) of the Oyster bus rate per journey

#### **5. Bicycle Allowances**

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- 5.1 Postholders with Essential User Status will be able to claim 10p per mile. There is no lump sum payment.
- 5.2 Other employees who wish use a bike for work travel can claim 25% of oyster bus rate per journey (i.e. 36p)

#### **6. Staff Car Parking Permits**

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- 6.1 Essential Car users with parking permits in Woolwich will have their permits paid for by Royal Greenwich.
- 6.2 All other staff that would like to purchase a parking permit will pay the full public rate for parking (£800 pa for 2013) subject to availability. Employees can complete a Salary Sacrifice form for car parking which will reduce the cost of parking to the employee (dependent on taxpayer band) and is deducted on a monthly basis direct from salary. There is no car parking permit loan scheme.

## **7. Assisted Purchase Scheme (Car, Motorcycle Loans)**

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- 7.1 Requests for car loans are only available to essential care users who have also completed their probationary period.
- 7.2 Full details of this scheme with the latest loan limits are available on the Intranet, Home Page, Resources, car loans.
- 7.3 Application forms and Scheme details are available from Financial Support Services. All approved applications will require evidence of driving licence, Insurance covering business use, MOT (if applicable) and vehicle registration document. Annual checks of these documents are required during the periods of the loan. This is separate to the audits carried out in connection with mileage claims.

## **8. Season Ticket Loans**

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- 8.1 Loans are available to any employee who is not an essential car user and not serving a probationary period. Application forms and Scheme details are available on the intranet Home Page, HR Intranet, Employee Benefits, Annual. Season Tickets

## **9. Parking and Congestion Charges**

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- 9.1 Employees necessarily incurring parking charges in the course of their duties will be reimbursed on production of a receipt or other evidence of payment. Under no circumstances will parking fines be reimbursed
- 9.2 Employees are expected to travel to Central London by public transport. However in exceptional circumstances where it is agreed with the line manager that is not possible, the congestion charge may be reclaimed on the production of proof of expenditure.

## **10. Car Audits**

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- 10.1 All car users who undertake work travel on behalf of Royal Greenwich will be subject to an audit annually to cover the following
  - check of car registration document to ensure the employee is the keeper of the car and to examine the tax class and if the employee is entitled to claim vehicle allowances if disabled
  - MOT status to ensure the vehicle is deemed roadworthy
  - driving licence to ensure the employee may legally drive the vehicle
  - vehicle insurance including appropriate cover for business use

- 10.2 Employees must inform their manager if anything affects the validity of their driving licence, MOT or Insurance certificate. A failure to do so could result in action being taken under the Disciplinary Procedure.

## **11. Authorisation and Claims**

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- 11.1 Journeys carried out on behalf of Royal Greenwich should be recorded by employees and submitted to the employee's line manager on a monthly basis. Claims must be submitted within 3 months of travel.
- 11.2 In particular the authorising manager must be satisfied that:
- A. each journey was required for the better performance of the employee's duties
  - B. the calculations on the form are correct
  - C. the receipts attached correspond to the amounts claimed (receipts should be kept as evidence of expenditure). For Oyster journeys within the borough there will be no receipt. NB For journeys outside the borough a receipt is required and the employee must provide proof of purchase before reimbursement.
  - D. Where the employees have an existing season ticket, monthly or annual Oyster card they will be required to use this for travel.
  - E. Where an employee's season ticket already covers the cost of travel, no further claim will be allowed.
  - F. the claim is in line with the Staff Travel Policy
  - G. The claimant is not claiming for expenses which should be met through other processes.
  - H. It is line management's responsibility to ensure that submitted forms are true and correct.
- 11.3 Where the journey starts or finishes at the employee's home, the miles travelled for the journey will be based on the "lesser rule" i.e. the claim must be based on the lesser of the 2 possible journeys – either home to place of work visited or work to place visited where the journey starts and/or finishes from the employee's home. The "lesser rule" is accepted as a legitimate claim by the Inland Revenue and will not be subject to tax liability.



## **Appendix A**

### **APPEAL PROCESS - ESSENTIAL CAR USER STATUS**

**Any reference to Human Resources, Chief Officer or employee in the procedures below shall be construed as relating equally to other persons authorised to act on their behalf.**

The Appeal Officer must be senior to the employee and at least equal in seniority to the person who made the decision against essential car user status.

#### **Right of Appeal**

1. There is a right of appeal to an Appeal Officer against any decision by a Chief Officer to advise an employee that their post has not been granted essential car user status.
2. Appeals must be lodged within 5 working days of the date of the decision and provided to the Chief Officer of the appellant
3. The reason for appealing must be explained in writing and must relate to meeting one or more of the following essential car user criteria:
  - Significant emergency response work which is an integral part of the duties of the post
  - Regular travel at hours/to places where no public transport is available
  - Regularly transporting customers or heavy/bulky equipment
  - Disabled employees where required (as reasonable adjustment) to enable travel to work and work visits
  - The duties of the post require a significant proportion of multiple journeys each week, which would mean that the employee would become prohibitively unproductive if public transport were to be used
  - The employee is likely to be at significant risk if they are unable to use their car to carry out their duties

4. No other criteria will be considered relevant or be an allowable ground for appeal.
5. The appeal will normally be heard within 10 working days of it being lodged, but in any event as soon as is reasonably practicable.
6. The Appeal will be heard by a Chief Officer in the same directorate. Arrangements for the appeal will be made by the directorate of the appellant
7. Human Resources will not normally attend appeals to assist the Appeal Officer unless specifically requested
8. The employee will be given at least 5 working days notice of the hearing and will also be advised of the date, time and place, and of their right to be accompanied by a trade union representative, or a work colleague.
9. No witnesses are allowed to be called as the appeal is based on the essential car user criteria.
10. The Chief Officer and the appellant must submit a Case Statement and any necessary documentary evidence in support of the case at least 5 working days before the date of the appeal hearing.

## **Procedure at hearing**

The hearing of the appeal will proceed as follows:

- (a) The Appeal Officer will establish that the employee is aware of their rights to representation.
- (b) The employee will submit their case in the presence of the Chief Officer (Limited to 15 minutes)
- (d) The Chief Officer shall be given the opportunity to ask questions of the employee (limited to 10 minutes)
- (e) The Appeal Officer and HR (if present) may ask questions of the employee and witnesses (limited to 10 minutes)
- (g) The Chief Officer will submit their case in the presence of the employee. (Limited to 15 minutes)
- (h) The employee shall be given the opportunity to ask questions of the Chief Officer (limited to 10 minutes)
- (i) The Appeal Officer and HR may ask questions of the Chief Officer (limited to 10 minutes)
- (k) The Chief Officer and the employee may sum up their cases if they so wish. The employee has the right to sum up last (limited to 5 minutes)
- (m) The Appeal Officer may, decide:
  - (i) That the appeal is not upheld, and the Chief Officer's decision be confirmed.
  - (ii) That the appeal is upheld. In these circumstances the Appeal Officer will decide on the course of action to be taken by the Chief Officer.
- (o) The decision of the Appeal Officer is final. The decision shall be conveyed to both parties in writing within 5 working days from the date of the appeal.