

# Section 10 – Travel, Subsistence, Relocation and Motor Car Loan Provisions



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#### TRAVEL AND SUBSISTENCE ALLOWANCES

#### TRAVEL AND SUBSISTENCE POLICY STATEMENT

#### 1. Rail Travel

Reimbursement of rail travel will be at second class rates. Chief Officers can, in exceptional circumstances, authorise first class travel in advance of the expenditure being incurred.

#### 2. Subsistence Allowances

It is not envisaged that there are any circumstances arising where subsistence allowances will be paid to employees working anywhere within Calderdale's boundaries during normal working hours.

The only circumstances where subsistence allowances should be payable are as follows:-

- (a) where employees of the Council are unavoidably delayed on business outside Calderdale and additional expenditure is incurred;
- (b) where subsistence is part of the cost of a course/conference;
- (c) where applicants travel to attend interviews for positions within Calderdale;
- (d) significant unplanned overtime is worked at management's request outside normal work hours;
- (e) where it is impossible to acquire food at reasonable prices when on business outside Calderdale and it is deemed unreasonable by the Chief Officer to have made alternative arrangements.

#### 3. Overnight Provision

All employees who are required to make overnight stays in the performance of their duties will be reimbursed expenses that have been approved beforehand by the Chief Officer; such expenditure that is to be reimbursed is not to exceed that paid to Elected Members from time to time in accordance with published circulars (currently - up to a maximum of £86.49 (£98.63 in London) - this covers a continuous period of absence of 24 hours). Employees are requested to produce receipts wherever practicable.

#### 4. Expenses of Candidates for Appointments

The expenses of candidates for appointment shall be paid in accordance with Paragraph 1 to 3 above, plus any other expenses necessarily incurred by them on production of receipts where appropriate, except where a candidate withdraws his application or refuses the offer of employment on grounds which the interviewer or interviewers consider inadequate. The expenses of the candidate appointed will not be

paid until he/she takes up the duties of the post. Candidates should be notified of the terms of this provision when invited for interview.

#### 5. Chief Officer Provision

The Council shall reimburse Chief Officers their reasonable out of pocket expenses.

#### 6. Mileage and Fuel Allowances

These are reviewed by the Council from time to time in accordance with the current policy.

#### 7. Subsistence Allowance Rates

Subsistence rates are revised annually with effect from 1 April. Revised rates are notified from the Local Government Management Board for Yorkshire and Humberside.

#### Subsistence Allowances wef 1.4.15

Breakfast	£ 7.94	Tea	£ 4.31
Lunch	£10.96	<b>Evening Meal</b>	£13.59

#### **Out-of-Pocket Allowances (Residential Training Course) wef 1.4.15**

Per Night £ 6.14 Per Week £24.67

## Meal Charges for Residential and Allied Staffs (Resident and Non Resident Staff and their Families and Guests) wef 1.4.15

Breakfast £0.97 Dinner/Main Meal £1.69

Tea £0.48 NB : Dinner and tea cannot be claimed together

Snack/Supper £0.77

For ease of administration these rates may be used on a weekly basis at £27.07 or £117.76 per month; or £1413.21 per annum.

NOTE: The figures quoted include VAT.

#### **Private Use of Council Vehicles**

Managers, Supervisors and employees throughout the Council are reminded that Council vehicles must only be used for legitimate Council business. The vehicles are not placed at the disposal of an employee for private use.

There are no arrangements in place for staff to use Council vehicles for private use other than authorised commuting from home to work. The only exception to this is a small number of employees who are provided vehicles under their terms and conditions of employment. They are allowed to use vehicles for private use, but pay appropriate vehicle and fuel benefit charges as applicable.

In certain cases, some employees can be granted the use of a vehicle for commuting to and from home. These must be authorised by the employee's Manager and the Council's Transport Manager in the first instance.

The arrangements are clear in that an employee would have to seek authorisation for significant use of a vehicle for private use, over and above where this is deemed to be insignificant eg dentist appointment on the way home from work, if allowed to use a vehicle for commuting to and from work.

Any unauthorised private use of Council vehicles would be liable to vehicle benefit taxation charges. Employees may also leave themselves open to disciplinary action. If you are in any doubt you should contact your line Manager or the Council's Transport Manager (Paul Topham - 392137 or via e-mail).

#### MILEAGE AND FUEL ALLOWANCES

- 1.1 The Council will use a scheme of allowances based on the HMRC scheme for all users.
- 1.1.1 Employees designated as 'Essential user' will be required to have available a car on all occasions when required to perform their job. This facility is likely to be on a daily basis unless specifically agreed by the employee's manager. Where appropriate a car parking permit/facility will be provided at no cost to the employee.
- 1.1.2 Employees designated as 'Casual user'- on agreement with the employee's manager the employee may use their car for business mileage in line with the criteria set out in this policy.
- 1.1.3 The Council will review allowances periodically taking account of HMRC rates.
- 1.1.4 User status, travel, mileage and fuel allowances will be reviewed in line with the development of the Council's Corporate Travel Plan. The intention is, where possible, to reduce the specific requirement for employees to use their own car, as more cost effective options become available
- 1.2 Rates of reimbursement for using an employee's own transport are detailed below:

#### Mileage and Fuel Allowances

Effective for existing employees 6/4/2014 and new appointments from 5/11/2013.

	First 10,000 business miles in the tax year	Each business mile over 10,000 in the tax year
Essential User Car and Van rate	45p	25p
Casual User Car and van rate	45p	25p
Motorcycle rate	24p	24p
Bicycle rate	20p	20p
Passenger Rate - essential and casual car user only	5p	

1.3 Passenger Payments – Cars and Vans

HMRC rates allows for an additional tax free allowance of 5p per passenger per business mile for carrying fellow employees in a car or van , which are also work journeys for them.

1.4 This policy does not form part of any employee's contract of employment and it may be amended by the Council at any time following consultation with recognised Trade Unions.

#### **VAT on Car Mileage Claims**

Her Majesty's Revenue and Customs ("the taxman") have introduced new rules affecting employers who pay mileage allowances to employees for business journeys. At present, a small proportion of the mileage rate paid to staff is treated as covering the cost of VAT on petrol. As the Council can reclaim from the tax authorities any VAT which we pay, this means that these amounts can be reclaimed from central government. At present this amounts to almost £20,000 per year, across the whole of the Council. From 1 April 2006, however, the Council will only be able to reclaim the VAT element of car mileage claims if they are accompanied by a valid VAT receipt, dated before the date of the journey(s) for which the claim is being made.

It is therefore vital that you ask your garage for a VAT receipt whenever you fill up with fuel (even if you don't, at the time, expect to be using your car for work purposes) and that you attach a valid VAT receipt whenever you submit a mileage claim form. Even if these are not used immediately, they should be retained for possible use at a later date

HMRC accept that in most cases VAT receipts will include fuel for private use and will not match the journeys claimed for. Receipts can cover more than one claim form, particularly where fuel is purchased towards the end of a period, but must pre date the journeys made. In other words, a VAT receipt dated 15th of April cannot cover journeys made before that date but could cover journeys made at any time after that date, providing it is for sufficient fuel.

Your line manager will be responsible for checking that you have attached a VAT receipt before authorising and passing your claim for payment. We appreciate that there may be certain circumstances where it will no be possible to attach a VAT receipt, and therefore we will pay your claim as normal, even if there is no VAT receipt attached. In this case, however, the VAT will be recharged to your manager's budget instead of being reclaimed from the taxman.

The new legislation is effective from 1st April 2006.

#### Reimbursement Codes for Employees using Public Transport during Council Business

Employees travelling on Public Transport whilst undertaking legitimate Council business using a valid pre-paid travel ticket/pass are entitled to claim £1.50 travel costs per day on any day when such a journey(s) is undertaken. This reflects the allowance agreed for those employees who have purchased a Company Metrocard or First bus pass through the Council's Scheme and who subsequently use the pass for travelling on Public Transport for legitimate Council Business.

#### **GUIDANCE ON TRAVEL ARRANGEMENTS**

A number of specific types of journeys are subject to different rules for claiming travelling allowances. These are set out as follows:-

#### 1. Payment of Public Transport Rates

If the employee is not an essential car user and the journey does not satisfy the criteria for the payment of a casual user allowance (see Paragraph 3, Page 8) then the cheapest public transport rates will be payable. Note that it may be the case that a member of staff will be entitled to claim casual user allowance for some journeys but only public transport rates for others.

#### 2. Journeys Outside the Calderdale Boundary

Journeys made outside the Calderdale boundary be paid at the cheapest public transport rate (regardless of whether car or public transport is used) except when the payment of car allowance is authorised in advance by the Chief Officer.

In determining whether to authorise payment of car allowance for a journey by car outside Calderdale the following points should be considered:-

- i) Is the employee's working day likely to be significantly extended to an unacceptable degree if public transport used?
- ii) Are there reasonable connections for journeys by public transport?
- iii) Is equipment etc to be carried by the officer would this make a journey by public transport inconvenient?
- iv) Are several employees having to make the same journey is it cheaper for them to travel in the same car or to travel by public transport? In such circumstances, where a journey by car is authorised, the passengers will not be entitled to claim the cost of public transport as expenditure on such will not have been incurred.
- v) The nature of the journey makes the use of public transport impractical (including the location of the work to be done or the amount of travelling to be undertaken).

#### 3. Journeys in Relation to Training and Development Activities

Travelling expenses for all employees undertaking training and development activities will be paid at public transport rates except where the payment of car allowance is authorised in advance by the Chief Officer.

In determining whether to authorise payment of car allowance for a journey by car for a training and development activity points (i) to (v) in Section 3 above should be considered.

#### CAR PARKING EXPENSES FOR ESSENTIAL AND CASUAL CAR USERS

Wef April 2014 an e-form in Selima HR is available for use by all car mileage claimants. Receipts/car parking tickets must be submitted by post together with a <a href="CMR1 form">CMR1 form</a>. For those without online access, a printable form is available – speak to your manager.

#### **Casual Car Users**

#### Within Calderdale

Casual car users who incur car parking expenses whilst carrying out Council business will be reimbursed these expenses to a maximum of £5.00 per day (on the basis of expenditure incurred).

A casual car user who has purchased a permit at his/her own expense should park in a designated car park (see list below) – no additional car parking expenses will be reimbursed.

#### **Outside Calderdale**

Employees travelling on Council business outside the boundaries must have been granted permission from his/her line manager in order that mileage can be claimed. Approved car parking expenses in excess of the £5.00 maximum daily rate can be claimed. All receipts must be attached to the CMR1 form.

#### **Essential Car Users**

#### Within Calderdale

Essential Car Users who are permit holders can park in any of the following car parks without incurring any charge.

Halifax	Sowerby Bridge	Todmorden	Brighouse
Victoria Street	Tuel Lane	Halifax Road	Owler Ings Road
Union Street	West Street	Lever Street	Daisy Street
King Street	Stanley Street	<b>Union Street South</b>	Bank Street
Crosshills	Royd Lane, Ripponden	Dalton Street	Church Lane
North Bridge		Dale Street	Mill Lane
Hanover Street		Oxford Street	
Prescott Street			
Queens Road			

Elland
Brook Street
Timber Street
Northgate
Southgate
Brig Royd, West Vale

Cross

Haugh Shaw Road West, King

Hebden Bridge Market Place Garden Street New Road

#### CAR PARKING SCHEME POLICY

- 1.1 The Council will enable employees to purchase, via a salary sacrifice arrangement, an annual contract car park permit from Parking Services.
- 1.2 The full commitment price of the permit is determined annually by Parking Services. However, the employee will pay for the permit through monthly payroll deductions and in so doing will not be required to pay tax or national insurance contributions on the amount sacrificed. The Council will save employer's National Insurance on the sacrificed amount. Parking Services will receive the full annual fee for the permit.
- 1.3 An employee who chooses to participate in the scheme will be required to complete an application form. Each application will be assessed to check whether the employee is eligible to take up the option. An employee must be on a permanent contract or a temporary contract covering the full period of the permit year. Applications may be made at any point during the calendar year.
- 1.4 This policy does not form part of any employee's contract of employment and it may be amended by the Council at any time following consultation with recognised Trade Unions.

Click here for Scheme Guidance and FAQs

Click here for Car Parking Scheme Form

Click here for 3-Day Part Time Permit Form

## ARRANGEMENTS AND CRITERIA FOR REVIEW OF ENTITLEMENT TO ESSENTIAL AND CASUAL CAR USER STATUS

#### 1. Essential Car User Entitlement Criteria

To retain essential car user status employees must undertake more than 1500 miles per year and satisfy the following criteria as determined by the job description for the post.

- (i) be required to respond quickly or urgently to work situations on a regular basis;
- (ii) be required to carry heavy or bulky equipment which could not reasonably be carried on public transport on a regular basis; and/or
- (iii) be required to carry other passengers on a regular basis;
- (iv) be required to respond to work situations at unsocial times (at night, early morning or during a weekend) on a regular and frequent basis;
- (v) the nature of the journeys makes the use of public transport completely impractical (including the location of the work to be done or the amount of travelling to be undertaken).

NOTE: Essential Car Users are required to have their own vehicle at their disposal at work in accordance with the Mileage and Fuel Allowance Policy.

#### 2. Special Cases

If any Chief Officer feels there is a *special case* within their Service where an employee does not satisfy the criteria but for whom it is considered and continues to be an essential requirement this will be agreed in consultation with the Corporate Lead for HR. The reasons for such an award must be documented by the Chief Officer.

#### 3. Casual Car User Entitlement Criteria

- i) It is necessary to respond quickly or urgently to a work situation on a regular basis:
- ii) it is necessary to carry heavy or bulky equipment which could not reasonably be carried on public transport on a regular basis;
- iii) it is required to carry other passengers on a regular basis;
- iv) it is necessary to respond to work situations at unsocial times (at night, early morning or during weekend) on a regular basis:
- v) the nature of the journey makes the use of public transport completely impractical (including the location of the work to be done or the amount of travelling to be undertaken).

#### 4. Review Period

An annual review of car mileage and car user status will be conducted using a 1500 mile rolling average for the previous 2 years. To qualify for essential car user status employees must also meet the 5 criteria previously identified. The review will be carried out after March of each year by the Corporate Lead for HR in consultation with Chief Officers. Where an employee's status is to be changed, this will be confirmed in writing to the employee.

#### **ESSENTIAL CAR USERS**

## Retaining Status by Satisfying New Criteria

SEIVICE	

Name	Car Registration	Engine Capacity	Criteria Satisfied *

			designation
Information Co	ompiled By	 	
Verified By		 	
Date		 	

- \* All employees included on this form must satisfy the 1500 miles criteria and the 5 following criteria:
  - i) be required to respond quickly or urgently to work situations on a regular basis;
  - ii) be required to carry heavy or bulky equipment which could not reasonably be carried on public transport on a regular basis; and/or
  - iii) be required to carry other passengers on a regular basis;
  - iv) be required to respond to work situations at unsocial times (at night, early morning or during a weekend) on a regular basis;
  - v) the nature of the journeys makes the use of public transport impractical (including the location of the work to be done or the amount of travelling to be undertaken).

#### **ESSENTIAL CAR USERS**

#### **Losing Status**

S	ER	VI	CE	
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Name	Car Registration	Engine Capacity	Reason *

- Reason Insert (1) or (2)
- (1) (2) Failure to complete 1500 miles - or
- Failure to satisfy one of the other designated criteria

			Designation
<b>Information Co</b>	mpiled By	 	
Verified By		 	
Date		 	

#### **CAR MILEAGE CLAIMS AND RECORDING**

The following arrangements apply to essential and casual car mileage allowance.

The <u>Manager and Employee Guidance</u> provides examples of worker profiles and mileage claims. You may also wish to refer to the <u>Smarter Working Policy</u>.

#### **Completing Car Allowance Claims**

- 1) Claims are to be submitted each month using the on-line e-form in Selima HR.
- 2) Claims should be presented in a legible manner if paper form is used (where there is no access to an e-form).
- 3) Employees should show full, correct and accurate details on claims.
- 4) All computations on claims should be correct before submission.
- 5) Employees are responsible for ensuring that all details are correct. Failure to properly record mileage details and properly complete claims could lead to disciplinary action taking place.

#### **Procedure for Claiming Car Mileage Allowance**

- a) All journeys must be entered and officially recorded.
- b) The start and finish point of each journey, or each leg of composition journey should be stated in full at all times. Exact destinations should be stated, ie a city, town, village is insufficient, the exact address must be given.
- c) The names of official passengers and reasons for journeys should be stated accurately.
- d) Claims should be based on the most practical route possible.
- e) Public transport should be used whenever reasonably convenient and appropriate and using the Company Metrocard.
- f) Journeys not made from an employee's agreed base, ie made from an alternative start point, should show the reason for that start point on the employee's car mileage record sheet.
- g) Allowances will not be paid for journeys between an employee's residence and his normal place of work.
- h) If an employee proceeds direct to a site rather than to his workplace, the employee may claim Car Allowance from that site to any subsequent points of call, this is to say that the site shall be regarded as his/her start point for that day.
  - If the site(s) are further from the employee's home than the normal base of work then excess mileage can be claimed providing the journey is recorded and that home to work mileage is deducted.
- i) Journeys made outside the Borough boundary should be made by public transport unless specific prior approval is given by the Chief Officer for the employee to use

his/her car and to claim car mileage. Reasons for approving the claiming of car mileage can include for example the time of the start of the meeting, location of meeting and whether passengers and/or equipment are carried etc. Journeys re approved training courses etc should always be reimbursed at public transport rates unless prior approval to claim car mileage is given by the Chief Officer.

- j) Car allowances are not payable in the event of an employee being requested to work outside his/her normal working hours.
- k) Employees should share a vehicle when travelling to the same destination (wherever possible) if public transport is not appropriate.

#### SALARY SACRIFICE CAR LEASE SCHEME POLICY

A salary sacrifice based car leasing scheme is to be made available for Council Employees. It is anticipated that the scheme will be available for all staff on permanent contracts and those on fixed term contracts where their contract end date is beyond the lease end date. Enrolled employees will pay a benefit in kind tax dependant on the CO2 value of the vehicle but this will be offset by the savings made on the salary sacrifice element of the agreement.

Specific details of the scheme available are published separately according to the Council's procurement process.

#### Car Loan Scheme

If an employee is in receipt of a car loan, they need to check with the car loans function in the Income Section (Halifax 357257) – extension 3546 regarding their repayments whilst on Maternity Leave.

If an employee decides not to return to work after Maternity Leave then the outstanding balance on their car loan together with any accrued interest will become immediately repayable.

#### ASSISTED CAR PURCHASE SCHEME (ESSENTIAL CAR USERS)

#### A. MAIN CONDITIONS

- 1. Applications for loans under the Assisted Car Purchase Scheme will not be accepted unless:-
  - 1.1 The applicant has an Essential User Car Allowance with Calderdale Council. Essential users will be entitled to receive loans for car purchase.
  - 1.2 The applicant is a qualified car driver holding a full current valid driving licence.
  - 1.3 The applicant will be the registered owner of the car being purchased and which is the subject of the loan.
  - 1.4 The application form is signed by the Chief Officer of the relevant Service, or in the case of absence by his/her designated Deputy.

#### B. GENERAL CONDITIONS

- 2. The following conditions will apply to each loan application:-
  - 2.1 An applicant should not enter into any binding commitment to purchase a car prior to checking with Income Section that the loan application fully conforms with the scheme requirements and is approved.
  - 2.2 The maximum loan permitted, as fixed by the Council, is currently £5,000. This limit may be varied by the Council for new loans at any time.
  - 2.3 The repayment period for loans under this scheme shall not exceed:
    - i) Five years for new cars or second hand cars up to three years of age.
    - ii) For secondhand cars over three years of age the loan period will be restricted so that at the end of the loan period the car is not more than eight years old.

NOTE: Provided that in the case of a secondhand car the repayment period shall not exceed the estimated future life of the car stated in an independent qualified engineer's report.

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- 2.4 Where an authorised car user has an existing debt with a commercial undertaking (bank, finance company, hire purchase company) in respect of a car loan the Council will undertake to redeem only the principal element of the loan outstanding, always providing satisfactory evidence is produced of the debt outstanding and the total sum advanced does not exceed the value of the car at that time.
- 2.5 The full amount of the loan outstanding shall become immediately repayable if for any reason the employee leaves the employment of the Council or if he/she sells or otherwise parts with the motorcar or fails to insure the motorcar or becomes bankrupt.

NOTE: Exceptionally, where employment is terminated by the Council (premature retirement following application or on health grounds), the loan may be continued by monthly instalments providing the employee's pension entitlement is sufficient to cover the monthly instalments. Where the employment is terminated by the employee, in all cases the loan is to be repaid in full upon leaving.

- 2.6 During the continuance of the loan the employee is required to insure the car by way of comprehensive insurance policy against loss or damage by fire, theft or accident and against third party claims against the employee on the Council.
- 2.7 The type of motorcar to be purchased is left to the discretion of the applicant provided the Chief Officer certifies that the vehicle is suitable for the duties to be undertaken.
- 2.8 There are no restraints placed upon an applicant's choice of car accessories but the amount of the loan must not exceed the lesser of the value of the car plus attached accessories or the amount paid for it after setting off any trade-in, private sale or scrap value of an existing car. The value (or amount) should exclude Road Fund Licence, insurance, petrol, non-refundable deposits. It is not intended the scheme shall provide funds in excess of the sum required to finance the purchase of the motorcar.
- 2.9 Where an application is in respect of a secondhand car it must be supported by an independent qualified engineer's report as to the condition, road worthiness and reasonableness as to the price of the car being purchased. The cost of this certificate will be borne by the applicant. If the engineer's report states that certain repairs are essential a certificate is required from the Vendor to the effect that such repairs have been completed.
- 2.10 A list of independent qualified engineers can be obtained from Service Administrative Officers or from the Chief Finance Officer's Income Section.
- 2.11 Where an applicant wishes to exchange a motorcar during the currency of a car loan agreement the Council will require, in the event of the loan not being fully satisfied, that the proceeds of the trade-in, private sale or scrap value of the present car be applied to the purchase of the new vehicle. Then, subject to a

proper application being made and accepted by the Council, a new loan agreement will be entered into in respect of the balance of the old loan plus any further new loan granted. The aggregated loan outstanding must never exceed the value of the new car being purchased.

- 2.12 The selling price of any car which the employee has disposed of otherwise than by part exchange during the preceding twelve months shall be applied in reduction of the loan being applied for.
- 2.13 A minimum period of two years must have elapsed from the date of a previous loan application before a further loan will be given.
- 2.14. A transfer of a loan from one car to another is permissible if the terms of the agreement are to be unchanged, ie no additional advance, no extension of loan term, same repayment. This may be allowed within the two year period. A £25 administration fee will be charged to cover the new agreement.
- 2.15 Where an employee has an existing car loan with a former local authority and takes up employment with this Council, the balance of that loan will be accepted for transfer notwithstanding that the employee may not be an Essential Car User in his new appointment. Such an employee would not be eligible to apply for a further loan once the existing agreement expired.
- 2.16 When an application for a car loan has been submitted and is subsequently withdrawn by the applicant after a cheque has been drawn, a £25 administration fee will be charged for abortive work, in lieu of the full £50 fee.

#### C. LEGAL REQUIREMENTS AND LOAN AGREEMENT PROVISIONS

- 3. The approval and offer of a car loan by the Council under this scheme is subject to:-
  - 3.1 The applicant completing the Council's Form of Agreement for car purchase loan.
  - 3.2 The applicant providing a detailed pro-forma invoice or Bill of Sale from the vendor of the car being purchased.
  - 3.3 The applicant being required to pay an Indemnity Insurance premium for the purpose of indemnifying the Council against all loss, costs, charges and expenses incurred by the Council in respect of the Agreement.
  - 3.4 Production by the applicant of a comprehensive insurance policy cover note or certificate in respect of the motor insurance of the motorcar.
  - 3.5 Payment of an administrative charge which will be included in the total advance for calculation of interest.
  - 3.6 A cheque for the purchase of a motorcar will be drawn in favour of the vendor in the amount of the loan and handed to applicant, if items 3.1 to 3.5 are all satisfied.

- 3.7 Repayment of the loan by monthly deduction from the employee's pay. The employee will be required to sign an authority for the Council to make such deductions.
- 3.8 Interest is chargeable based on an Annual Percentage Rate. However, for administration purposes the Council calculates interest by reference to the total loan (including the administration fee and the indemnity insurance) and on the basis that the loan will run its complete term.
  - As a result, for procedural purposes, the Council regards interest as being paid at twice the "flat rate" of interest calculated at six monthly rests on the reducing outstanding balance.
- 3.9 During the currency of the Agreement the employee will be required to use the motorcar in the performance of official duties as required by the Council.
- 3.10 An employee in receipt of a car loan under this scheme will only be allowed to claim car allowance in respect of mileage done in that vehicle except on occasions when the vehicle is not otherwise available due to undergoing servicing or repair.

#### D. ENQUIRIES

4. If you have any queries regarding assisted car purchase, please contact Wendy Lodge (3547) who will assist in any way possible.

### Calderdale carshare scheme

Car sharing is when two or more people, travelling to the same destination or to different places along one route, get together to share the car journey. Car sharing helps to reduce the congestion and pollution caused by traffic on our roads.

What is car sharing?

Who can do it?

Anyone who lives or works in Calderdale can car share, using the Calderdale car share scheme. The service is free to use and is provided by Calderdale Council as part of the West Yorkshire car share scheme.

You can sign up to the scheme and register your journey details by visiting <a href="www.wycarshare.com">www.wycarshare.com</a>. The system will then match you with other members going in the same direction, and allow you to make contact through a secure email connection. You can register any number of journeys, and different types of journey can also

How do I do it?

be registered (ie regular ones like commuting to work, as well as occasional or one-off trips for shopping or going to the match).

CMBC staff can also register on the Council's private group – membership of this group requires an email address ending in <a href="mailto:@calderdale.gov.uk">@calderdale.gov.uk</a>. Council employees receive the added benefit of the Guaranteed Ride Home facility – if you are called away from work earlier than expected, for example by a family emergency, you can simply call a cab and we will refund the cost in full. This service can also be used in the unlikely event that your lift does not show up. Contact Emmanuel Areikin to reclaim your fare: <a href="mailto:emmanuel.areikin@calderdale.gov.uk">emmanuel.areikin@calderdale.gov.uk</a>, ext 2049. (To date this service has never been used – that's how well car sharing works!)

Why should I do it?

Car sharing saves you money. Sharing a journey means you can share the fuel and parking costs between everyone in the car—and because car sharers' cars are used less often overall, wear and tear is reduced so your car will require less maintenance. The car share website offers guidelines on what constitutes a fair amount to offer or request for petrol.

How flexible is the scheme?

The car share scheme is as flexible as you want it to be. You choose who you share with and when, and there's no obligation to share with the same person on every journey - you can share with as many different people as you like. You can choose to be contacted by telephone or e-mail, and even make notes on your journey record of any preferences you have, eg non-smokers, or women only.

The success of the scheme depends on as many people as possible joining - the more members there are, the more likely it is that you will find a car sharing match. So tell your friends, family and colleagues about the scheme!

Top tips

Keep coming back to the site to search for new matches if you don't find one straight away, because more people are joining all the time.

Remember to update your journey details as they change over time – this way, the site is always upto-date and you are more likely to find a match that works.

# CALDERDALE COUNCIL'S COMPANY METROCARD SCHEME

- APPLICATION & INFORMATION PACK
- AGREEMENT TO TERMS AND CONDITIONS WITH CALDERDALE COUNCIL AND PAYROLL DEDUCTION CONSENT FORM





Issued: January 2016

### Calderdale Council's

### **MCard Annual Pass Scheme**

## **Application & Information Pack**

## All you need to know to join the scheme

✓ Save up to £581.25 on your annual commuting and leisure journeys



- ✓ Discounted travel 7 days a week, 365 days a year
- ✓ More money in your pocket claim flat-rate payments for Council business travel
- ✓ Unlimited travel on bus services throughout West Yorkshire
  - ✓ No price increase whilst ticket is valid

#### **IMPORTANT:**

You must read this pack before you join the scheme. You will have to sign a declaration confirming that you have done so.



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#### 1 Introduction

Calderdale Council in partnership with Metro, the West Yorkshire Passenger Transport Executive, is pleased to offer all permanent and fixed-term CMBC staff the opportunity to purchase an MCard Annual Pass at a 15% discount. CMBC offers staff members an interest free loan to purchase the annual ticket, with deductions to recoup the money paid on behalf of employees, made from monthly salaries over a period of 10 months (maximum).

Metro has awarded this discount to Calderdale Council employees in recognition of the Council's Corporate Travel Plan. The Travel Plan implements measures to widen the range of travel options available to employees and to encourage a shift from dependency on single-occupancy car trips to other modes of transport. The overall aim of the Travel Plan is to reduce the Council's impact on the environment through transport (commuting, business travel, management of our vehicle fleet, etc).

#### 2 About the MCard Annual Pass Scheme

#### 2.1 How the discount works

Metro sell **annual MCards** direct to individuals as a matter of course. These annual tickets cost less than if the person bought weekly, monthly or quarterly tickets throughout the year. The train and bus operators (which are private companies) agree to build in this discount as a reward for the individual paying a lump sum 'up-front'. This means that the bus companies get a guaranteed income with which they can plan their investments and expenditure. The companies also hope that owners of annual MCards will also be more inclined to travel by public transport. The purchaser is, effectively, awarded a discounted rate in recognition of their 12-month commitment (which is the equivalent of a 'bulk purchase' of public transport tickets).

The *MCard Annual Pass* is an annual MCard that has an additional 15% discount added to it because the company (Calderdale Council in this case) is making pro-active efforts to reduce its transport impact on the environment, by promoting and encouraging use of sustainable transport modes amongst its staff. Metro annually reviews companies' progress on Travel Plans and assesses their continued eligibility for the 15% MCard Annual Pass discount.

#### 2.2 Types of MCard Annual Pass available

There are 5 different types of MCard Annual Pass available - you will be able to travel by train within the rail zones you choose *plus* travel *anywhere* on the West Yorkshire bus network, or by bus only throughout West Yorkshire (there are no zonal restrictions on bus services).

**Note**: Your MCard Annual Pass cannot be used on football or concert special buses, long-distance coaches, excursions, tours, contract, chartered or other privately hired bus or train services.

#### 3 What does the MCard Annual Pass cost?

The table below outlines the cost of each type of MCard Annual Pass (column 4, highlighted in yellow). Please note that these prices are for the full 12-month card. If you are joining for the first time, partway through the year, then you will receive a 'short-period' card that will be a different price from those quoted here (contact Emmanuel Areikin in Environmental Management for details – telephone 01422 392049). The table also gives a comparison showing how much it would cost you to travel over the same period by purchasing weekly tickets (column 2) or a standard annual MCard (ie without

the additional 15% Corporate discount - column 3). The total savings you will make are detailed in column 5.

#### Prices effective from 1 February 2016

	Column 2		Column 3	YOU PAY:	Column 5
Ticket type	cket type Cost if purchasing weekly		Annual	MCard	**SAVING**
	tickets instead (deducting 4 weeks, allowing for non-use during annual leave periods)		MCard (standard cost)	Annual Pass (additional 15% discount)	(15% discount price versus weekly cost)
Bus only (all of					
West Yorks)	£1065.60	(£22.20 X 48 wks)	£875.00	£743.75	£321.85
Bus + rail					
zones 1-3	£1353.60	(£28.20 X 48 wks)	£1117.00	£949.45	£404.15
Bus + rail					
zones 1-4	£1632.00	(£34.00 X 48 wks)	£1312.00	£1115.20	£516.80
Bus + rail					
zones 1-5	£1920.00	(£40.00 X 48 wks)	£1575.00	£1338.75	£581.25
Bus + rail					
zones 2-5	£1344.00	(£28.00 X 48 wks)	£1100.00	£935.00	£409.00

#### (See Appendix A for Map of Zones)

#### **IMPORTANT**

These prices are correct at 1<sup>st</sup> February 2016. Prices are likely to rise on the first Sunday in January 2017. Metro retains the right to change prices at any time. Cards purchased before a price rise is announced will not be affected. Any renewals or new purchases after a price rise will be at the new prices.

#### 4 Who is eligible to join the scheme?

#### 4.1 <u>Permanent or fixed-term contract staff</u>

who are employed by Calderdale Council are eligible to join. This will mean that you:

- a) have a Calderdale Council employment contract, and
- b) are paid through Calderdale Council's payroll system.

#### 4.2 Essential Car Users

If essential car users wish to join, they are eligible subject to certain conditions.

All those who join the MCard Annual Pass scheme and routinely use it for travel on Council business are eligible to claim a flat rate of £1.50 per day as an incentive payment for using public transport rather than their car. Essential car users were previously not eligible to claim this flat rate payment as they received a lump sum payment as part of their essential car user status. However from 1 April 2014 the lump sum payment will not be paid and it has now been decided that from this date, where an Essential User has prior agreement with their manager, as per the HR policy, not to have to provide a car for work on certain days e.g. as part of a rota system, and they use their Corporate MCard for an unplanned meeting/visit they will be able to claim the flat rate of £1.50 per day.

The people most likely to want to purchase an MCard Annual Pass despite their essential car user status are those that wish to reduce their car use *outside of working hours in* 

their own leisure time. The Council's decision to offer discounted MCard Annual Passes to essential car users from which they can benefit in their own leisure time (and perhaps occasionally for work purposes with prior management approval) is an additional benefit for this group of staff.

## 4.3 <u>Staff who are employed by schools where the employer is not CMBC (e.g.</u> voluntary-aided schools, academies)

are NOT eligible to join the scheme. This is because these schools are not subject to Council policies such as the Corporate Travel Plan.

#### 4.4 Councillors

are eligible to join the scheme and to have monthly deductions made from the monthly payments they receive in their role as Councillor.

#### 4.5 Those who are NOT eligible to join the scheme:

- Casual staff
- Agency staff
- Staff who may be managed by Council employees under dual-/joint-working arrangements but who have a contract with another employing body, e.g. the NHS
- Staff whose employer may buy in a payroll service from Calderdale Council, but who are not Council employees, as defined above
- Staff employed by grant-aided, independent schools, academies or state schools that do not use the CMBC payroll service

#### **VERY IMPORTANT**

If you purchase an MCard Annual Pass and then leave the Scheme for any reason before your card has expired you will lose your right to the 15% discount. Any outstanding amount that you owe to the Council will be calculated using the combination of full-price monthly and weekly travel tickets that add up to the period over which you have used your card (e.g. 6 months and 2 weeks). This amount will then be deducted from the cost of the MCard Annual Pass, paid on your behalf, by the Council. You may therefore receive a smaller refund that you were expecting, no refund at all or (in some instances) end up owing the Council outstanding monies. **See Section 12 for more detail.** 

#### 5 How do I pay for my MCard Annual Pass?

#### 5.1 Paying by monthly deductions from your salary

The Council offers staff an interest-free loan with which to purchase their MCard Annual Pass. This effectively means that the Council purchases the card on your behalf and then recoups the costs from you by monthly salary deductions. Deductions will be made directly from your pay, starting in the month from which your card is valid. The number of deductions will vary, depending on whether you buy a full year's card or a short-period card, but the maximum number of months over which deductions are made is **ten**. For example:

PERIOD OF CARD VALIDITY	NUMBER OF MONTHLY DEDUCTIONS
12 months	10
9 months	7
6 months	4
3 months	2

#### **IMPORTANT**

Should you leave the Council's employment and wish to retain the card for the remainder of its valid period, any amount outstanding will be deducted from your final pay.

#### 5.2 Paying the full cost of your card in one instalment

Staff who wish to pay the full cost of their MCard Annual Pass in one instalment will be able to do so by cheque, credit card or debit card.

**To pay by Credit/Debit card** please complete the Credit/Debit Card Payment Form (at the back of this pack) with your card details and return with your application form to: Emmanuel Areikin, Environmental Management, Floor 2, Northgate House, Halifax, HX1 1UN.

**To pay by cheque** you must send the cheque, payable to Calderdale MBC, with your application form to: Emmanuel Areikin, Environmental Management, Floor 2, Northgate House, Halifax, HX1 1UN. Write your name clearly on the back of the cheque. **Also write the words** '*MCard Annual Pass Scheme*' on the back.

#### 6 When can I join?

The Council has arranged for staff to be **able to join the scheme every 3 months**, but all cards will expire at the same time. Expiry will always be 31 March in each year. Any staff joining the scheme at quarterly intakes <u>after</u> 1 April in any year (ie 1 July, 1 October or 1 January) will therefore receive a card that expires on the following 31 March (ie a 3, 6 or 9-month 'short-period' card). These cards will be bought at a proportional cost (HR Administration will inform you of the cost).

#### **IMPORTANT**

**Note**: These short-period cards are only allowed once, when you first join the scheme. All subsequent MCards (renewals) that you apply for will be for one full year.

Applications must reach Environmental Management two months prior to your desired start date to allow time for the necessary processing (at both the Council and Metro).

#### 6.1 Application Deadlines

The start dates for MCard Annual Passes in each quarter, for the coming year, and their respective deadlines, will therefore be:

- ❖ MCard Start Date: 1 April 2016 Application Deadline: 31 January 2016 (12 month card expiring on 31 March 2017)
- ❖ MCard Start Date: 1 July 2016 Application Deadline: 1 May 2016 (9 month card expiring on 31 March 2017) Subsequent renewal would be from 1 April 2017 for 12 months.
- ❖ MCard Start Date: 1 October 2016 Application Deadline: 1 August 2016 (6 month card expiring on 31 March 2017) Subsequent renewal would be from 1 April 2017 for 12 months.
- ❖ MCard Start Date: 1 January 2017 Application Deadline: 1 November 2016 (3 month card expiring on 31 March 2017) Subsequent renewal would be from 1 April 2017 for 12 months.

#### 7 How do I join?

#### 7.1 Joining for the **first time**

- 1. You must read all the scheme rules (contained in this information pack).
- 2. Contact Emmanuel Areikin for full details of the cost, the number of payroll deductions, and payroll deduction amounts (see **Section 7.3**).
- 3. Complete the Metro application form.
- 4. Provide a passport-sized photograph with your name written on the back in block capitals. Paperclip the photo to the application form. (Note 1: All new applications must include a photograph as MCards are now smartcards rather than paper tickets.) (Note 2: photos must be provided in hard copy, though this can be a good quality printout from a digital photo, in colour. The size must be correct: 2.5 X 3 cm / 1 X 1.5 inches.)
- 5. Complete the 'Agreement to Terms & Conditions with Calderdale Council & Deduction from Payroll Consent Form'. **Everyone must sign this form**.
- 6. If you are paying in one instalment, complete the 'Credit/Debit Card Payment Form' or enclose a cheque with your name and the words 'MCard Annual Pass Scheme' written on the back.
- 7. Send all the forms and the photograph to Emmanuel Areikin by the required deadline (contact details above).

**Tip**: make a note in your diary in the week before the valid start date of your MCard. If your card has not arrived by that date, telephone Emmanuel Areikin (see above) to check that everything is in order.

**See Appendix B** for a complete list of all the documents that you need to return.

#### 7.2 Renewing your MCard Annual Pass in subsequent years

- Re-read all the scheme rules in this Information Pack. Note: this is important because policy, prices and conditions may have changed since you bought your first MCard Annual Pass.
- 2. Contact Emmanuel Areikin (see **Section 7.3**) to find out the price of your new ticket and the amount of your payroll deductions.
- 3. Complete the Metro application form.
- 4. Provide a passport-sized photograph with your name written on the back in block capitals. Paperclip the photo to the application form. (Note 1: All new applications must include a photograph as MCards are now smartcards rather than paper tickets.) (Note 2: photos must be provided in hard copy, though this can be a good quality printout from a digital photo, in colour. The size must be correct: 2.5 X 3 cm / 1 X 1.5 inches.)
- 5. Complete the 'Agreement to Terms & Conditions with Calderdale Council & Deduction from Payroll Consent Form'. **Everyone must sign this form**.
- 6. If you are paying in one instalment, complete the 'Credit/Debit Card Payment Form' or enclose a cheque with your name and the words 'MCard Annual Pass Scheme' written on the back.
- 7. Send all the forms and the photograph to Emmanuel Areikin in Environmental Management by the required deadline (see **Section 6.1**).

See Appendix B for a checklist of documents that you should return to Emmanuel Areikin in Environmental Management.

#### 7.3 Any questions? Contact:

Name: Emmanuel Areikin, Environmental Management Officer

Telephone: 01422 392049

E-mail: emmanuel.areikin@calderdale.gov.uk

Postal Address: Floor 2, Northgate House, Halifax, HX1 1UN

#### 8 How will I receive my MCard Annual Pass when it is ready?

Your MCard Annual Pass will be available approximately two weeks before the valid start date. You will be informed via e-mail or telephone when your card is ready to collect. You are expected to visit Northgate House to collect your MCard Annual Pass. If you work from a remote site and you are not able to visit Northgate House at any point when travelling to or from work or on Council business before your card start date, then the following options must be pursued:

- Is anyone from your office travelling to Halifax and able to collect your card for you? If so, please telephone Emmanuel Areikin to confirm receipt of the card when you receive it from your colleague.
- If this is not possible, is any colleague from your Directorate or Service Area travelling to your remote location who could deliver it to you in person? Environmental Management may be able to assist with finding someone.
- In both of the above scenarios the colleague collecting the card on your behalf will have to sign for it at Northgate House.
- If the above two options are not possible, then Environmental Management will send the card to your home address by special delivery post. You will need to sign for the card.

## 8.1 What if Environmental Management have not notified me about my MCard Annual Pass's arrival?

You should receive your card at least one week before the valid start date. If you have not received your card by then please contact Emmanual Areikin in Environmental Management. Make a note in your diary in the week before your card's start date so that you will notice if anything has gone wrong and you don't receive notification of its arrival from Metro.

#### 9 Can I claim for using my MCard Annual Pass on Council business?

#### 9.1 Flat Rate Payments

Calderdale Council provides two benefits to staff members who purchase the MCard Annual Pass and use sustainable transport on Council business:

- Staff members receive a 15% discount on all their travel costs through the MCard Annual Pass Scheme (whether for leisure journeys, commuting to work journeys or travel on Council business).
- b) On top of this, the Council will pay staff members a flat rate payment of £1.50 per day on each of those days that they make a Council business journey on public transport.

#### **IMPORTANT**

The flat-rate payment is considered by the Inland Revenue to be a 'Benefit in Kind' (ie additional income for staff members). This means that **claims are subject to Income Tax (22%) and National Insurance (9.4% or 11%** depending on membership of pension scheme) charges. The Council must also pay the Inland Revenue an employer's National Insurance contribution on each claim. The result is that the £1.50 flat rate payment, in real terms in your pay-packet, will be **worth just over £1.00**.

#### 9.2 Who is eligible to claim flat rate payments for using their MCard Annual Pass?

Casual car users and employees who are not designated as car users are eligible to claim the flat rate payment. Essential car users are eligible **subject to certain conditions**:

In previous years, essential car users were <u>not eligible</u> to claim this flat rate payment as they received a lump sum payment as part of their essential car user status. However from 1 April 2014 the lump sum payment will not be paid and it has now been decided that from this date, where an Essential User has prior agreement with their manager, as per the HR policy, not to have to provide a car for work on certain days e.g. as part of a rota system, and they use their Corporate MCard for an unplanned meeting/visit they will be able to claim the flat rate of £1.50 per day.

The people most likely to want to purchase an MCard Annual Pass despite their essential car user status are those that wish to reduce their car use *outside of working hours in their own leisure time*. The Council's decision to offer discounted MCard Annual Passes to essential car users from which they can benefit in their own leisure time (and perhaps occasionally for work purposes with prior management approval) is an additional benefit for this group of staff.

#### 9.3 How to claim your flat rate payments

- Keep a note of all your travel by public transport on Council business in your work diary.
- Complete a 'Season Ticket Travel Expenses' claim form, which appears in Appendix C of this pack or can be obtained from Emmanuel Areikin, Environmental Management (see Section 7.3). This form can only be submitted to Environmental Management once per month, on or before the 20<sup>th</sup> of each month. If there is not enough room on the claim form, a schedule providing the same details can be attached to the form.
- Your claim form must be signed by your line manager. Your line manager must be
  able to verify the Council business travel that you have undertaken. Ensure, therefore,
  that you make him/her aware of your travel patterns, or ask them to initial each line of
  the form as soon as you have completed the travel described.
- Claims must reach HR Contracts & Payroll by no later than the 20<sup>th</sup> of the month.
- Claims for flat rate payments must be made for a minimum of one month's worth of travel. Claims for periods of less than a month will not be accepted for processing.

#### 10 What happens if my MCard Annual Pass is lost, stolen or damaged?

If you lose your MCard Annual Pass, it is possible to arrange a replacement. However, there is an administration fee of £5 and you are only allowed one replacement.

Please *do not* contact Council officers to arrange replacement. To apply for a replacement you will need to call Metro's Concessions and Integrated Ticketing Department, on either 0113 2517271 or 0113 2517 495, where a replacement MCard will be ordered. Please note that the replacement MCard will not be immediately available, as the order system takes up to 7-10 working days to produce the card. The replacement MCard will be sent to your home address.

If your MCard Annual Pass is stolen, you will need to report the theft to the police and obtain a Crime Reference Number. Then proceed as above (there is no charge for stolen cards).

Damaged MCards may be exchanged without charge.

## 11 What happens if I leave the Council's employment before my card expires?

#### 11.1 Keeping your card after you leave Council employment

If you choose to do so, you can keep your MCard Annual Pass and use it after you leave the Council's employment, until the expiry date. You will be required to pay the outstanding amount of the purchase price from your final salary or by debit/credit card deduction.

To qualify for keeping your card, you must **inform Environmental Management immediately after you have informed your manager of your intention to leave** (see **Section 7.3**). This should be done separately from informing your manager.

If you have not given Environmental Management enough notice to enable them to arrange a deduction from your final salary, you may be refused permission to keep your card and will have to surrender it in your final week of employment. You will be required to pay any outstanding monies from your final salary or by debit/credit card. At its own discretion, Environmental Management may decide that you can write a cheque, payable to CMBC, at least 10 days before your final leaving date.

#### 11.2 <u>Surrendering your card before you leave Council employment</u>

Alternatively you can surrender your MCard Annual Pass – to do this, contact Emmanuel Areikin in Environmental Management (see **Section 7.3**). **Remember** that by surrendering your card before the end of its valid period, you will lose your right to the 15% discount. You may end up owing the Council outstanding monies, even though you no longer have use of the card. For a full explanation of this, see **section 12** below.

#### 12 Can I cancel my card at any time?

If you wish to cancel your card for other reasons partway through the year, you must write to Emmanuel Areikin in Environmental Management stating your reason(s) (see **Section 7.3**).

Cancellations will only be allowed in exceptional circumstances. The Travel Plan Officer, will consider your reasons and make a decision as to whether to allow the cancellation or not

If cancellation is approved, return your card to Emmanuel Areikin. You will be advised of the outstanding monies that you owe. **Remember** that by cancelling your card before the end of its valid period, you will lose your right to the 15% discount.

#### **IMPORTANT**

If your request to cancel is approved, the amount owing on the cost of the card will be worked out according to Metro refund schedules. This calculation involves deducting from the discounted purchase price paid by CMBC on your behalf, the sum of the relevant combination of *full price* (i.e. not discounted) quarterly, monthly and weekly tickets that will make up the period of use that has already passed. Because the calculation is done on the basis of full price tickets and not the 15% discounted rate, there may be little or no refund value left on the card. You may indeed end up owing some money to the Council. An example of such a scenario is given below:

#### **Example**

If you cancel a bus-only MCard Annual Pass after 8 months and 2 weeks:

The full discounted cost of the MCard Annual Pass (bus only) ticket is £743.75. This is the amount that CMBC pays out on your behalf at the beginning of your card's valid period.

Metro's refund schedules calculate the cost of travel at the non-discounted rate for the 8 months and 2 weeks over which the card has already been used. This is calculated as follows:

2 X quarterly tickets = £510 (£255 each)

2 X monthly tickets = £180 (£90 each)

2 X weekly tickets = £44.40 (£22.20 each)

TOTAL = £734.40

Metro also charges a £1.00 administration fee, so the **TOTAL cost is £735.40**. This amount is deducted from the cost paid by CMBC for the MCard (£743.75) meaning that CMBC receives a £8.35 refund from Metro.

At the 8.5 month point when you cancel the ticket you will have paid deductions totalling £594.96 (8 deductions of £74.37 per month).

CMBC, after receiving Metro's refund has paid £735.40 for your MCard (ie £743.75 - £8.35 = £735.40)

The Council will then deduct from this amount that they have paid out on your behalf, the £594.96 that you have already paid through your pay packet. This would leave you owing the Council £140.44 (£735.40 - £594.96 = £140.44).

#### In this scenario, you would owe the Council £140.44

#### 13 Can I suspend my MCard Annual Pass if I am ill?

Whilst there is not a general right to a refund in respect of certified illness, Metro will consider, sympathetically on an individual basis, any request for a refund covering a period of certified illness of **more than one month**. To apply for this you must send your card back to Environmental Management (see **Section 7.3**) who will arrange for the return of the ticket to Metro. If you have not already produced supporting hospital/doctor's certificates to HR Administration, as per your obligation under the Council's Sickness Procedure, you must do so as soon as possible. Copies of these will be sent to Metro with your ticket. Any follow-on sickness certificates must also be sent through to HR Administration as soon as possible. Your card and details of the allowance that is granted for the non-use period will be sent back to the Council when you return to work.

## 14 What if I already have an annual MetroCard or other public transport season ticket?

If you already have a MetroCard, you have two options. You can carry on using your existing ticket until its expiry and then join the MCard Annual Pass scheme through the Council from the date of the next intake. Or, you can find out if it is more cost effective to get a refund on your existing ticket and start straight away with the MCard Annual Pass scheme. Please do not contact Environmental Management to help you with working this out. You need to contact Metro directly.

For MetroCard refund enquiries, contact Metro's Concessions and Integrated Ticketing Team on: 0113 251 7271/7329.

#### 15 Can I change the type of MCard Annual Pass I am using?

It is possible to upgrade or downgrade the type of MCard Annual Pass you are using.

If you want to do this, please contact Metro's Concessions and Integrated Ticketing Department (Heather - 0113 2517 271 or Richard - 0113 2517 495) to arrange an appointment at Metro's offices. A new MCard Annual Pass will be ordered and changes will be made to the deductions accordingly.

Please note that a replacement MCard will not be immediately available, as the order system takes up to 7-10 working days. The replacement MCard will be delivered to Metro's offices and a member of CIT Department will contact the holder to arrange a swap out.

#### 16 How do I find public transport information?

#### 16.1 Door-to-door Journey Planner

Metro, in conjunction with other passenger transport executives in Yorkshire, offer a Journey Planner service which helps you find the exact bus or train you need to take you from point A to point B.

You can plan your journey:

- from bus stop to bus stop
- from street to street
- from postcode to postcode
- from area to area
- or from/to any combination of these

And, once you've found your journey, you can click on maps that show where the bus stop is in relation to your home address or your destination.

To try it out, go to www.wymetro.com.

#### 16.2 West Yorkshire

As part of the Council's Corporate Travel Plan, a variety of timetables for both buses and trains are provided in Council buildings, at reception or in communal staff areas.

If you have a request for a specific timetable that you would like to be made available but cannot see, please inform Emmanuel Areikin (01422) 392049. If there is enough demand, extra timetables can be ordered for display.

Timetable information for West Yorkshire trains and buses can be found on Metro's website: <a href="www.wymetro.com">www.wymetro.com</a>, or you can **telephone Metroline** on 0113 245 7676 (7am-10pm, every day of the year except Christmas Day, Boxing Day and New Year's Day). Minicom is available for people with hearing difficulties on 0113 242 8888.

#### 16.3 National

National Rail Enquiries: www.nationalrail.co.uk or 08457 484950

**Transport Direct**: UK-wide journey planning using all forms of transport - www.transportdirect.info

#### 17 How can I find out more about less polluting ways of travelling?

More information can be found at the following locations:

#### Council website:

http://www.calderdale.gov.uk/environment/sustainability/generaladvice/travelsmarter.html

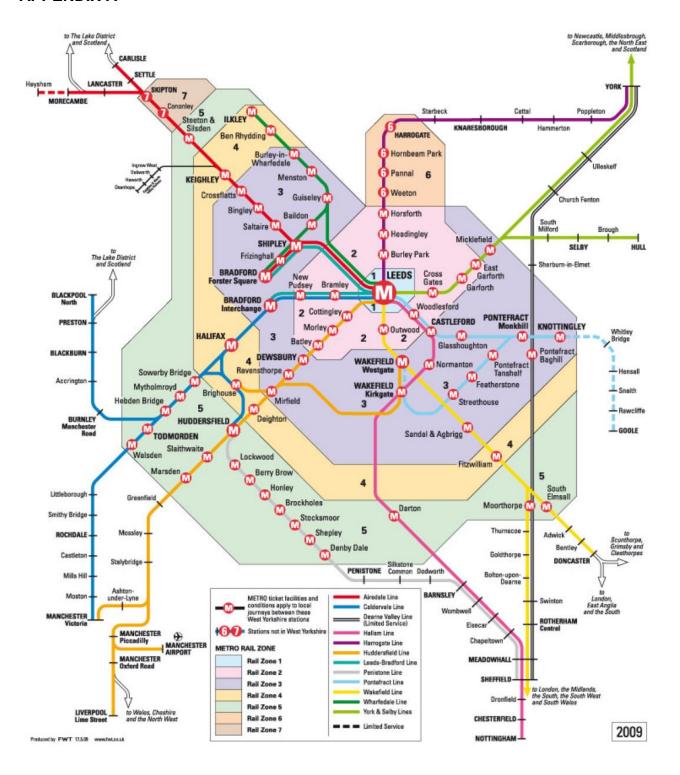
Intranet: http://connect/support-me/travel/Pages/default.aspx

Alternatively you can email <a href="mailto:environment@calderdale.gov.uk">environment@calderdale.gov.uk</a>. We welcome any suggestions and feedback about the Corporate Travel Plan.

Thank you for joining the MCard Annual Pass Scheme.

Please tell your colleagues about it and encourage them to join!

#### **APPENDIX A**



#### **APPENDIX B**

# Applicants must return the following completed documents to Emmanuel Areikin in Environmental Management:

#### **Applications for New MCards**

- 1. A passport-sized photo write your full name on the back in BLOCK capitals
- 2. Metro Application Form
- 3. Agreement to Terms and Conditions with CMBC & Payroll Deduction Authorisation form (everyone must sign this form)
- 4. Debit/Credit Card Payment Form if paying full cost of card in one instalment
- 5. Cheque if paying full cost in one instalment by cheque. Write your name and the words 'MCard Annual Pass Scheme' clearly on the back

#### **Applications for Renewals**

- 1. A passport-sized photograph is required for all applications, including renewals as smartcards are now used.
- 2. Metro Application Form
- 3. Agreement with CMBC Terms and Conditions & Payroll Deduction Authorisation form
- 4. Debit/Credit Card Payment Form if paying full cost of card in one instalment
- 5. Cheque if paying full cost in one instalment by cheque. Write your name and the words 'MCard Annual Pass Scheme' clearly on the back.

#### **APPENDIX C**

# Season Ticket Travel Expenses Claim Form Submit this form to HR Contracts & Payroll, Westgate House, Halifax HX1 1PS by no later than the 20<sup>th</sup> of each month

Nam	e				
Direc	ctorate				
Payr	oll Number				
Serv	ice				
Addr	ess (if required)				
		Travel Claim	n Details		
Date	Purpose of Journey	Name of person you were meeting	Destination	Amount to be claimed (Flat Rate)	Supervi- sor's initials***
	Total	Claimed			
***It is	s recommended that you ask	your supervisor to initi	al each travel expense	claim as it arise	S.
CLAI	MS <u>PER DAY</u> CANNOT EXC	CEED £1.50 (FLAT RA	TE)		
Emp	Employee Signature [			Date	
Certi	Certified by Section Head/Supervisor		oate		
Expe	enditure Code				
	SIGNATURES ARE N		PASSING TO HR		&
For P	ayroll use:				
Mon	th Paid:				
HR (	Contracts & Payroll Adm	inistrator:			

#### **APPENDIX D**

### **Calderdale Council MCard Annual Pass Scheme**

Agreement to Terms & Conditions with Calderdale Council & Payroll Deduction Consent Form

Name
Payroll Number (obtain from your wage slip)
Directorate
Payroll Deduction Consent  To be completed by Environmental Management OR telephone them to find out the correct information to be completed below:
I agree to repay £ Amount in words
This being the cost of my MCard Annual Pass for the period
to
I agree to make the repayments over months at the rate of $\pounds$ per month.
The first payment will be for the amount of £
<b>Agreement to Terms and Conditions</b>
I confirm that I have read and understood the CMBC 'Staff Application Pack' which states the conditions and policies under which the Council is offering the MCard Annual Pass Scheme. I agree to abide by the rules therein.
In particular I confirm that I understand that:
1. Receiving the 15% discount is dependent upon me staying in the scheme for the full duration of my card's valid period (this may be a short-period ticket or a 12-month ticket in year 1 but will always be a 12 month ticket in subsequent years).
2. If I leave the Council's employment before my MCard has expired and I wish to surrender the card, I understand that I will lose the 15% discount and it is likely that I will owe outstanding monies to the Council. These will be deducted in my final wage.
<ol> <li>I can only cancel my card in exceptional circumstances at the Discretion of the Council with decisions made on a case-by-case basis.</li> </ol>
Signed: Date:
Return this whole form (including the question below) to: Emmanuel Areikin, Environmental Management, Floor 2, Northgate House, Halifax, HX1 1UN.
To First Time Applicants only: Please Answer the Question Below
Before purchase of this MCard I travelled to work by:  Bus

#### APPENDIX E

To: HR Contracts & Payroll – please return this portion of the form to:

Environmental Management Team, Housing, Environment & Renewal, Northgate House HX1 1UN

## Code payment to control account for MCARD ANNUAL PASS SCHEME

#### **Credit/Debit Card Payment Form**

- By cheque made payable to Calderdale MBC (Post Dated cheques will not be accepted)
- 2. By Credit/Debit Card by Post (complete form below)

transactions)
Payment by Credit/Debit Card by Post
Name:-
Address:- Telephone (in case of queries):
I wish to pay by:
Visa/Delta/Eurocard Master Card/Switch
Name of Bank:
I authorise you to debit my account with the amount of £
My card Number is:
3 DIGIT SECURITY CODE CREDIT CARD ONLY
(From Signature strip on back of card)
Issue Number :- Expiry date of card:-
Signature:

Return completed form with supporting documents to: Emmanuel Areikin, Environmental Management, Floor 2, Northgate House, Halifax, HX1 1UN

#### CALDERDALE MBC RELOCATION PACKAGE

- 1. Applicable to all non-school based Council employees.
- 2. Maximum of £5,000; repayable in full if the employee leaves within 12 months; 24 months 75% repayable; 36 months 50% repayable. Receipts should be submitted of expenditure incurred in the relocation.
- 3. Newly appointed employees whose home to office mileage would exceed 30 miles, and who move to within 10 miles of their office are eligible for the payment.
- 4. The Corporate Lead for HR has delegated authority to vary the scheme for application in individual cases where it would not otherwise be possible to secure the services of a suitable employee for a post where there is proven shortage of suitable staff.