Lease Car Scheme

Human Resources Policy No. HR12

Additionally refer to:  HR01 Equality and Diversity
HR13 Travel Expenses

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<td>May 2005</td>
</tr>
<tr>
<td>V2 approved by</td>
<td>TNCC</td>
</tr>
<tr>
<td>V2 date approved</td>
<td>June 13</td>
</tr>
<tr>
<td>V2 Ratified by:</td>
<td>Trust Board</td>
</tr>
<tr>
<td>V2 Date ratified:</td>
<td>July 2016</td>
</tr>
<tr>
<td>Document Lead</td>
<td>Deputy Head of Human Resources</td>
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<tr>
<td>Lead Director</td>
<td>Workforce Director</td>
</tr>
<tr>
<td>Date issued:</td>
<td>July 2013</td>
</tr>
<tr>
<td>Review date:</td>
<td>July 2016</td>
</tr>
<tr>
<td>Target audience:</td>
<td>All Staff and Managers</td>
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### Version Control Sheet

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<tr>
<th>Document Lead/Contact:</th>
<th>Deputy Head of Human Resources <a href="mailto:Sara.hayes@sath.nhs.uk">Sara.hayes@sath.nhs.uk</a></th>
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<td>Version</td>
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<tr>
<td>Status</td>
<td>Draft</td>
</tr>
<tr>
<td>Date Equality Impact Assessment completed</td>
<td>May 2013</td>
</tr>
<tr>
<td>Issue Date</td>
<td>July 2013</td>
</tr>
<tr>
<td>Review Date</td>
<td>July 2016</td>
</tr>
<tr>
<td>Distribution</td>
<td>Please refer to the intranet version for the latest version of this policy. Any printed copies may not necessarily be the most up to date</td>
</tr>
<tr>
<td>Key Words</td>
<td>Lease car scheme, hire, insurance, mileage, contribution, monthly charge, Income Tax, maintenance, vehicle, breaks down, fuel, conditions of scheme, eligibility, lease, charges, accident, damage, mechanical failure, repair, termination, registration documents, purchase of lease</td>
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<tr>
<td>Dissemination</td>
<td>Staff quarterly update, HR policy page on SaTH intranet.</td>
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### Version history

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<td>Final</td>
<td></td>
<td>Agreed by Trust board</td>
</tr>
<tr>
<td>2</td>
<td>May 2013</td>
<td>Sara Hayes</td>
<td>Draft</td>
<td>Converted to new policy format with adjustments to show revised legislation, changes to the Agenda for Change Terms and Conditions of Employment Section 17: Reimbursement of Travel Costs, updates to Ready Reckoner of Car Benefit Charges and updates to procedure.</td>
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<tr>
<td>2.1</td>
<td>June 2013</td>
<td>Sara Hayes</td>
<td>Draft</td>
<td>Amended following discussion at TNCC Policies Sub Group</td>
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1 Document Statement

1.1 This policy sets out the Trust’s arrangements for the provision of lease cars to eligible staff.

2 Overview

2.1 This policy applies to all staff that will travel in excess of 3500 business miles per annum.

2.2 The policy does not apply to individuals employed by agencies or other Leasing Companies.

2.3 In implementing this policy, managers must ensure that all staff are treated fairly and within the provisions and spirit of the Trust’s Equal Opportunities Policy. Special attention should be paid to ensuring the policy is understood when using it for staff new to the NHS or Trust, by staff whose literacy or use of English is weak or for persons with little experience of working life.

2.4 This policy should be read in conjunction with any relevant national or local terms and conditions of employment.

3 Definitions

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<th>Leasing Company</th>
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<tr>
<td>User</td>
<td>Employee in receipt of leased vehicle</td>
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4 Duties

4.1 Managers are responsible for:
- Ensuring that lease cars are authorised correctly on the basis of the eligibility criteria set out in this policy;
- Ensuring that they review the eligibility of every lease car user in their department on an annual basis against the eligibility criteria set out in this policy;
- Ensuring that where circumstances change (e.g. where an individual commences a new role, or where an individual notifies the Trust of any relevant offences), adequate consideration is given to the individual’s continued eligibility for a lease car;
- Taking appropriate action (which may include the termination of the lease car agreement) subsequent to each individual review;
- Notify the individual of any changes to the terms of contract or changes to elements of the individual contribution;

4.2 Employees are responsible for:
- Notifying their manager where they believe that their eligibility for a lease car (on the basis of the eligibility criteria set out in this policy) has changed;
- Ensuring that where circumstances change (e.g. where they commence a new role, or where they are convicted of a relevant offence), they notify their line manager;
5. Eligibility

5.1 The decision whether to allocate a lease car to an individual is entirely at the Trust’s discretion.

5.2 However, when making this assessment the Trust will take the following factors into account:

- the job commitments of the post holder, including the nature, frequency and urgency of the journeys to be undertaken;
- the distances to be travelled (if this is the principal basis for the decision then the applicant will normally be expected to claim a minimum of 3,500 business miles each year)
- the physical requirements of the jobholder
- the need to transport equipment.

5.3 The Trust will then assess whether there is an economic or job-related case to justify the offer of a lease car to the individual post holder.

5.4 In some cases, the Trust may decide to provide a car to a pool of staff. Managers should refer any such cases to the Car Leasing Officer in the Finance Department, who will advise on the case.

5.5 The arrangements set out within this policy relate to cars offered to individual post holders only.

5.6 The Lease Car Scheme is available to all staff who meet the mileage criteria or who otherwise have a job-related need. Where such an offer is made and the employee decides to reject that offer, then any eligible car mileage will be reimbursed at the reserve rate of reimbursement; this is irrespective of the engine size of the employee’s car. Relevant rates will be paid for other means of transport where applicable.

5.7 Where, although the normal criteria are met, the Trust decides not to offer a lease car to an individual, car mileage will be reimbursed at the normal rates.

5.8 The decision whether to allocate a lease car to an Executive Director will be referred to the Remuneration Committee of the Board.

5.9 The decision whether to offer a lease car to an individual will be based on objective criteria in accordance with the requirements and spirit of the Trust’s Equality & Diversity Policy HR01

6 How the scheme works

6.1 What kind of vehicles will be available?
Contract Hire agreements have been negotiated with national car hire companies and quotations can be provided, on most makes and models of car. However, for purposes of calculation the base vehicle will be the cheapest Vauxhall Corsa 1.2 3 door. In some circumstances (e.g. because of equipment carried, or the nature of journeys undertaken) an alternative base vehicle may be deemed appropriate. The employee's manager will need to make a specific case to the Car Leasing Officer, which will be considered on its merits.

In order to satisfy the Trust’s carbon reduction strategy, and to safeguard the environment, a maximum CO₂ emissions of 140 g/km will be enforced for personal lease cars.

6.2 How much does the car holder have to pay?
The charge varies depending on the private mileage anticipated during the three years lease period, but staff who apply will receive individual quotations appropriate to their particular circumstances. Staff are required, as a condition of the car being available for private use, to make a payment for that use.
6.3 What does the car holder’s contribution cover?
• Rental of vehicle for private mileage. Staff are required, as a condition of the car being available for private use, to make a payment for that use.
• Any ‘buy-up’ costs, i.e. where the cost of the chosen car exceeds the lease cost of the ‘base’ car
• Road Fund Licence
• Maintenance of vehicle
• Insurance for private use (employee and immediate family)
• Membership of a motoring organisation (AA, RAC etc full home start and relay)
• VAT on the above
• Handling Charge

6.4 When are the payments made?
The costs will be deducted on a monthly basis through the payroll for 36 months and will normally commence the month after delivery of the vehicle.

6.5 Who pays for the fuel?
All fuel will initially be paid for by the employee, who will then reclaim the fuel-only cost of mileage travelled on Trust business in accordance with the Trust’s policy on travel expenses. Expenses should be claimed using the relevant form and submitted on a monthly basis. Reimbursement of mileage expenses will be at the rates set out in the Trust policy on travel expenses. There is no additional payment for carrying passengers.

6.6 What happens to subsistence allowances?
Subsistence expenses are not affected by this scheme.

6.7 Will the car holder be liable to Income Tax?
Individual car holders will be assessed for income tax in accordance with the relevant regulations currently, employees earning over £8,500 per annum, including car benefit, are taxed on a set scale for receiving a "company car" taxable benefit. This scale is reduced by any contribution made by the employee for use of the car. Further details are shown in Appendix A.

6.8 What maintenance is the driver responsible for?
Drivers are required to carry out the following minimum checks:
Daily: Fuel, brakes, lights, indicators and tyre pressures.
Weekly: Oil, water, battery level and condition of tyres.
Frost Protection: Antifreeze mixture checked and renewed as necessary not later than the end of October annually.

6.9 How is vehicle maintenance carried out?
Routine servicing, replacement of tyres and batteries and repair and replacement will all be carried out at a franchise dealer’s garage of your choice. Employees must ensure that servicing is carried out at predetermined times, to be identified at the commencement of the contract. All servicing costs are covered by the contract. It is the driver’s responsibility to ensure that the vehicle is kept in a clean and tidy condition.

6.10 What happens if the vehicle breaks down?
Full cover is provided by the leasing company for this eventuality. Therefore if the vehicle breaks down or refuses to start for whatever reason, the driver must use the breakdown service provided by the leasing company at all times.

6.11 What happens if the mileage exceeds the estimated mileage?
An additional charge will occur at the end of the contract if the excess is as a result of the private mileage element.
6.12 What happens if I leave the Trust?
On the user's termination of employment, retirement or death, the vehicle is simply returned to the Car Leasing Office. If the user is disqualified from driving or breaks any of the conditions within the scheme, a termination charge may be payable. All cases will be considered on an individual basis.

6.13 What happens if I do not want to accept the offer of a vehicle?
Medical staff who were employed by Shropshire Health Authority in their existing post prior to 1st September 1987, have been continuously employed by the Trust or its predecessors since that time and who have historically been classed as “Regular Users” throughout that time retain the right to receive the normal rates of travel expenses for using their own vehicles. The Lease Car Scheme is available to all staff who meet the mileage criteria or who otherwise have a job-related need. Where such an offer is made and the employee unreasonably declines the offer of a lease car, then any eligible car mileage will be reimbursed at the reserve rate of reimbursement; this is irrespective of the engine size of the employee’s car. Relevant rates will be paid for other means of transport where applicable.

7 Conditions of the Scheme
The purpose of this section is to give details of the arrangements and conditions for providing vehicles to members of staff under the Trust’s Lease Car Scheme. Staff who have made an application and are allocated a vehicle under the Scheme shall be deemed to have accepted the conditions set out below.

7.1 General
7.1.1 The scheme is offered to eligible drivers, primarily to enable them to perform their official duties. Vehicles can be made available for private use, which includes journeys from home to base, and charges for private usage will be borne by the employee.

7.1.2 The scheme is based on a Car Hire Contract(s) between the Trust and a supplier (“the Leasing Company”) under which the latter, who retains ownership, hires a vehicle to the Trust for a period of three years. The employee to whom the vehicle is allocated (“the User”) has no contractual relationship with the Leasing Company supplying the vehicle and is not permitted to make any separate arrangements regarding the supply of the vehicle with the Leasing Company.

7.1.3 The overall administration of the scheme is the responsibility of the Car Leasing Officer.

7.1.4 Charges for private use will cover routine maintenance, road fund licence, insurance, membership of a motoring organisation and reasonable repair costs. Additional costs due to deliberate abuse or wilful neglect may be charged to the User as detailed in this document.

7.1.5 A Driver Instruction Book will be supplied with the vehicle on delivery by the Leasing Company, together with other appropriate documentation.

7.1.6 An indication of the range of charges which will apply to vehicles available under this scheme is given below. Individual quotations can be obtained by contacting the Car Leasing Office. In order to select the body and upholstery colours required for vehicles, manufacturers’ brochures should be obtained from Dealers locally to assist with selection.
7.2 Eligibility for a Lease Car

7.2.1 Staff who travel a minimum of 3,500 business miles per year or who have a job-related need for a car will be eligible to apply for a Lease Car.

7.2.2 Applicants will require their manager to confirm their continuance as an eligible driver for the foreseeable future (3 years).

7.2.3 Eligibility is subject to the employee not having been found guilty of a motoring offence and which, as a result of that conviction, prevents them from obtaining comprehensive insurance.

7.2.4 The Trust reserves the right to refuse any application. The reasons for any refusal will be advised to the applicant.

7.3 Application for a Lease Car and Disposal of Existing Vehicles

7.3.1 An employee electing to participate in the Scheme will be responsible for the disposal of their own vehicle.

7.3.2 Requests for quotations must be submitted to the Car Leasing Office on the form supplied (see Appendix B). The Office will then prepare both an application form and a formal agreement and forward them to the applicant who should respond with a firm commitment or refusal. Under no circumstances will a car be supplied before a formal agreement has been made between the Trust and the applicant.

7.3.3 It should be noted that the rates of charge quoted on agreement forms will be current at the time of receiving the request for a quotation and any delay in completing and returning the application and agreement forms may result in revised rates being quoted as a result of changes in the Leasing Company's charges.

7.3.4 The driver will be contacted by the Car Leasing Office to finalise delivery arrangements and will then be asked to contact the Car Leasing Officer to finalise delivery arrangements. The user will be required to sign a receipt upon acceptance of the car.

7.3.5 Whilst this Scheme generally covers cars in all insurance groups, a User may have to bear extra insurance costs in addition to the normal monthly charge. This may arise if the Insurance Company decides further charges are required, depending upon the type of car required and the driving record of the persons who will drive the car.

7.4 Terms of Lease

7.4.1 Whilst participating in the scheme, all Users will be required to have the vehicles at their disposal at all times for official business (except in exceptional circumstances). All official journeys must be undertaken in this vehicle, apart from journeys that are normally undertaken by alternative modes of transport, e.g. rail journeys to London. Alternative modes of transport must only be used exceptionally.

7.4.2 The User shall permit representatives of the Trust or the Leasing Company to inspect the state and condition of the vehicle at any reasonable time and place before the contract terminates.

7.4.3 On termination of the User's entitlement to the vehicle (see below), the vehicle should be returned to the Car Leasing Office.

7.4.4 Vehicles hired under this scheme must not be used for rallying, pace-making, racing reliability trials or for testing purposes.
7.5 Charges to the User
7.5.1 The User will pay a monthly contribution which will be deducted monthly from their salary.

7.5.2 The User's monthly contribution will only be varied during the Lease period in the event of changes in the rates of:

- Road Fund Licence
- VAT (or other Government Legislation)
- Increase in insurance charges (see paragraph 8.6 below)
- AA/RAC or other motor organisation's cover
- Lease contract payment to lease companies
- Handling charge

7.5.3 The user's contribution will cover lease, road fund licence, membership of a motoring organisation and insurance. Servicing and maintenance, provision of replacement components and tyres made essential by normal wear and tear are also covered.

7.5.4 Any costs that are incurred to rectify deliberate abuse or wilful neglect by the User will be charged to the User in addition to their monthly contribution.

7.5.5 The User will pay for all fuel, together with oil and other fluids required between servicing. Factory or dealer fitted accessories requested by the user will be paid for directly by the User.

7.5.6 Any further accessories which are required subsequent to delivery must be fitted at the employee's expense, providing that the Leasing Company and Car Leasing Office are notified in advance. Any cost of returning the car to its original condition after removing accessories at the end of the hire period will be borne by the employee.

7.5.7 An excess mileage charge will be incurred and will be charged to the User should the mileage of the vehicle exceed the contracted mileage as a direct result of private mileage exceeding that which had been projected.

7.6 Mileage Claims
7.6.1 An allowance for fuel is paid for normal business mileage at a rate determined by the HM Revenue and Customs bi-annually. This allowance may be varied from time to time having regard to changes in fuel costs.

7.6.2 In order to claim reimbursement for business mileage, the User will be required to complete a mileage claim each month. If a User fails to submit such claims for a period of three months, the Trust shall have the right to cancel the lease car agreement.

7.7 Insurance (including travel abroad)
7.7.1 The insurance cover arranged by the Trust is fully comprehensive. The policy document may be inspected on application to the Car Leasing Office. A brief summary is given below.

7.7.2 The prices quoted provide fully comprehensive insurance with the following limitations:

- the User driving the lease car for NHS Trust business and social, domestic and pleasure purposes
- named full or provisional licence holders of the User's immediate family e.g. spouse or children using the car for social, domestic and pleasure purposes
- travel by a member of the User's family in connection with their own business is not covered by the policy
- under no circumstances must any person other than the User and the named members of the User's immediate family who are permitted to drive by the Trust drive the car on the public highway.
Insurance cover will normally be subject to an excess charge as follows:-

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<td>Drivers under 21</td>
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<tr>
<td>Drivers aged 21-25</td>
<td>£200 accidental damage</td>
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<tr>
<td>Provisional licence or licence held less than 18 months</td>
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7.7.3 For overseas travel, the insurance automatically provides cover in respect of all member countries of the European Community. Any costs arising under this paragraph will be charged to the User.

7.7.4 Claims on the insurance policy as a result of incidents which occur whilst the employee is on official business will be the responsibility of the Trust, including any excess payments. However, claims which result from incidents when the employee is not on official business will result in the User paying the excess, as appropriate, whoever was considered to be the cause of the incident. If the user feels that the third party involved was responsible for the incident, he/she can attempt to reclaim the excess from the insurance company of the third party concerned. In the event of the insurance company imposing a surcharge on a specific driver as a result of a number of claims under this policy, the excess cost will be recharged to the driver concerned.

7.7.5 Any User taking the lease vehicle outside the United Kingdom must notify the leasing company in writing and must also obtain AA 5 Star cover (or equivalent) to ensure that the vehicle would be returned to the United Kingdom in the event of serious breakdown or accident. Written authorisation and a copy of the vehicle registration document should be obtained from the leasing company before the User leaves the United Kingdom. All additional costs must be borne by the user. Any advice on the insurance cover required for overseas travel can be obtained from the Insurance Company.

7.7.6 As the Trust is the insurance policy holder, cover for driving vehicles not owned or hired by the Trust is not included. The driver of any such vehicle will therefore be subject to the conditions and cover of the policyholder's motor vehicle policy of insurance of these other vehicles.

7.7.7 Should the User be convicted of any offence, other than a parking offence, in connection with any motor vehicle, during the period of participation in the Scheme and the User is not disqualified from holding a licence, the Trust reserves the right to impose special terms. The User shall notify the Car Leasing Office immediately of any such conviction.

7.7.8 In cases where the production of evidence of insurance is necessary, a letter of authorisation and a copy of the insurance certificate can be obtained from the Car Leasing Office.

7.7.9 The ‘No Claims’ bonus on an employee’s existing car insurance should be protected if there are no claims on the Trust's insurance policy which are attributable to that employee. A certificate will be issued by the Trust on request to the effect that no claims have been made by the User concerned.

7.7.10 Fully comprehensive insurance is included but there are certain exclusions contained within the policy concerning personal accident benefits and personal effects.

7.8 Accidents, Damage or Mechanical Failure

7.8.1 In the case of an accident or other damage, however slight, details must be submitted immediately to the Car Leasing Office, which will forward the appropriate Accident Report Form for completion. No major repair work may be undertaken without the permission of the Car Leasing Office.
7.8.2 "Emergency" repairs can be undertaken but in such cases, the procedure outlined in the Leasing Company's Handbook should be followed. If such repairs are necessary, the Leasing Company's Maintenance Control Manager should be informed prior to the repairs being carried out. In cases of major repair work, advice from the Car Leasing Office will be given as soon as possible after the matter has been reported.

7.8.3 For cases of accidental damage, the Leasing Company should be notified, together with the Insurance Company. The insurance certificate will be available from the Car Leasing Office.

7.9 Maintenance and Repair
7.9.1 The costs of servicing, mechanical and electrical repairs, unlimited replacement of tyres due to fair wear and tear, repairs to tyres and replacement of batteries and exhausts for the period of the contract are included in the User's contribution.

7.9.2 Authorisation for repairs, replacement vehicles and accessories etc, will be obtained by the Car Leasing Office from the car Leasing Company after they have been provided with the relevant details. "Emergency" repairs of a modest cost do not require prior authorisation, but the services of the appropriate motoring organisation should be called upon before any costs are incurred.

7.9.3 The operation of the vehicle maintenance service will commence with a request to enter, on a form supplied by the Leasing Company at the time of delivery, the local franchised dealer at which the User is required to have his vehicle serviced or repaired. From then on, the Leasing Company would, on receipt of the completed form, set up a credit facility with that garage and the User simply has to make contact with the dealership to book the car in for servicing and any other work which is required. Any charges incurred in maintenance and servicing will be charged direct to the Leasing Company. The servicing dealerships are requested to obtain an official order number from the Leasing Company and authorisation for the work carried out. Should a roadside breakdown occur, or problems occur at the User's home address, then he/she will have the back up of two alternatives: (1) to contact the appropriate motoring organisation for assistance; or (2) to contact a telephone number provided by the Leasing Company where a 24 hour service is available.

7.9.4 Replacement tyres, glass, headlights, aerials, windscreen wipers, exhausts, due to deliberate abuse or wilful neglect are not included in the Contract Hire Agreement. Any such costs that the Leasing Company considers are appropriate that are charged to the Trust must be reimbursed by the User.

7.9.5 It will be the User's responsibility to ensure that routine servicing and maintenance are carried out at intervals recommended by the Manufacturers. It is stressed that it is the User's responsibility to report to the nominated servicing agent any defect in the vehicle with particular reference to those items which affect road worthiness, e.g. brakes, lights, steering, and tyres in need of replacement.

7.9.6 The User has specific responsibility for the following:
   a. Keeping the vehicle in a clean condition
   b. Frequently checking oil, water, fluids, tyres, etc.
   c. Ensuring the reasonable security of the vehicle at all times. Any costs of garaging are to be borne by the User.
   d. Conforming to all instructions and recommendations in the Manufacturer's Handbook and all other instructions given by the Leasing Company or Trust.
7.10 Temporary Vehicle Unavailability

7.10.1 A replacement vehicle will not be supplied should the lease vehicle be off the road due to servicing, mechanical failure or accident damage. However, the Car Leasing Office does maintain a small pool of cars for emergency purposes and their allocation will be on the basis of priority being given to maintaining direct patient services and charged accordingly. Users who make alternative temporary arrangements privately will be reimbursed for official mileage at the current reserve rate, irrespective of the car’s engine size, or as per trust policy if an alternative mode of transport is used.

7.11 Termination of Lease

7.11.1 Subject to the exercise of an option to purchase as provided below, the User's right to the vehicle will be terminated forthwith in the following circumstances:

a) at the expiration of the lease period
b) by the User's breach of any of the conditions of the Lease Scheme
c) on the User's termination of employment with the Trust, retirement or death. In cases of death in service, arrangements can be made for the User's family to retain the vehicle for a period of up to 90 days at the existing monthly payment. In cases of retirement or termination of employment, the user must advise the Car Leasing Office at the earliest possible opportunity of their intention to terminate their service. Failure to do so could result in a termination payment being charged to the user (see below).
d) in the event of a change in circumstances which results in the User ceasing to be eligible e.g. where the jobholder's business mileage no longer justifies the offer of a lease car. However, at the Trust's discretion, the User may be permitted to retain the lease vehicle on a personal basis until the expiry of the three years contract. A new charge would be calculated.
e) in the event of the User being disqualified from holding or for any reason ceasing to hold a valid licence entitling them to drive the vehicle. (The Trust may exercise its discretion for short periods of disqualification).

7.11.2 In the event of prolonged sickness, training, maternity leave etc, the employee may choose to continue the private use at the contracted charge or to return the vehicle. In the latter case no financial penalty will be payable by the employee.

7.11.3 Upon termination of the User's participation in the scheme the Leasing Company will expect all vehicles to be returned in the following condition:

a) No body damage other than fair wear and tear. The Leasing Company will not accept accident damage but will accept paintwork and bodywork deterioration compatible with normal usage over three years at the stated mileage
b) No accident damage to light or glass coverings
c) All tyres to have at least 2mm of tread
d) No interior damage other than fair wear and tear, i.e. no damage to seats, headlinings, dashboard, boot interior, stains from oil, glue, chemicals etc.
e) To be in a clean condition.

7.11.4 Any disputes will be referred to arbitration by the AA (or similar) and the costs of this arbitration will be borne equally between the Leasing Company and the Trust.

7.11.5 The User will be required to reimburse to the Trust the cost of any repairs that the Leasing Company considers are needed to bring the vehicle back up to good condition, taking fair wear and tear into account, unless in the opinion of the Car Leasing Office there are good reasons for waiving this requirement.

7.11.6 In the event of a premature termination for reasons given in paragraphs 7.11.1 (b) (c) and (e) above, the User may be liable for an early termination payment.
7.12 Registration Documents
These will be held by the car Leasing Company, but a letter of authorisation can be obtained from them as evidence of authority to drive the vehicle.

7.13 User Purchase of Lease
The User may negotiate directly with the Leasing Company an option to purchase the lease vehicle upon termination of the period of the contract.

7.14 Liability to the HM Revenue and Customs
The User may be subject to Income Tax according to legislation.

7.15 Driver Instruction Book
The User must comply, in all respects, with the terms set out in the Driver Instruction Book which will be issued by the Leasing Company at the time of delivery.

8 Review process

8.1 The policy will be reviewed every three years unless there are significant changes at either at national policy level, or locally.

8.2 The policy will also be automatically updated by any changes in relevant government statute or regulation e.g. relating to income tax liability.

8.3 In order that this document remains current, any of the appendices to the policy can be amended and approved during the lifetime of the document without the document strategy having to return to the ratifying committee.

9 Equality Impact Assessment (EQIA)
This policy applies to all employees equally and does not discriminate positively or negatively between protected characteristics.

10 Process for monitoring compliance

<table>
<thead>
<tr>
<th>Aspect of compliance or effectiveness being monitored</th>
<th>Monitoring method</th>
<th>Responsibility for monitoring (job title)</th>
<th>Frequency of monitoring</th>
<th>Group or Committee that will review the findings and monitor completion of any resulting action plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total annual Mileage</td>
<td>Audit of total mileage from odometer of car compared to business mileage claimed for via expenses</td>
<td>Lease Car Officer</td>
<td>6 monthly</td>
<td>TNCC Policies meeting Workforce Committee</td>
</tr>
<tr>
<td>Continued eligibility of individual against eligibility criteria contained within this document</td>
<td>Local assessment of each individual against eligibility criteria</td>
<td>Line Manager</td>
<td>Annually</td>
<td>Care Group Board</td>
</tr>
</tbody>
</table>
11 References
Agenda for Change Section 17: Reimbursement of Travel Costs - available from SaTH Intranet or
http://www.nhsemployers.org/PayAndContracts/AgendaForChange/mileage/Pages/Reimbursementofstaffbusinesstravelcosts.aspx

12 Associated Documentation
HR01 Equality and Diversity
HR13 Travel Expenses
HM Revenue & Customs fuel rates - available from
http://www.hmrc.gov.uk/cars/advisory_fuel_current.htm
### LEASE CAR SCHEME

**Ready Reckoner of Car Benefit Charges**

Note: The exact CO\(_2\) figure is rounded down to the nearest 5 grams per kilometre (g/km).

<table>
<thead>
<tr>
<th>CO(_2) emissions in grams per kilometre</th>
<th>% of car’s price taxed</th>
<th>Diesel supplements</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013/14</td>
<td>2014/15</td>
<td>2015/16</td>
</tr>
<tr>
<td>0</td>
<td>0</td>
<td>N/A</td>
</tr>
<tr>
<td>1-75</td>
<td>1-75</td>
<td>N/A</td>
</tr>
<tr>
<td>76-94</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>95-99</td>
<td>76-94</td>
<td>N/A</td>
</tr>
<tr>
<td>100-104</td>
<td>95-99</td>
<td>N/A</td>
</tr>
<tr>
<td>105-109</td>
<td>100-104</td>
<td>0-94</td>
</tr>
<tr>
<td>110-114</td>
<td>105-109</td>
<td>95-99</td>
</tr>
<tr>
<td>115-119</td>
<td>110-114</td>
<td>100-104</td>
</tr>
<tr>
<td>120-124</td>
<td>115-119</td>
<td>105-109</td>
</tr>
<tr>
<td>125-129</td>
<td>120-124</td>
<td>110-114</td>
</tr>
<tr>
<td>130-134</td>
<td>125-129</td>
<td>115-119</td>
</tr>
<tr>
<td>135-139</td>
<td>130-134</td>
<td>120-124</td>
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<tr>
<td>140*-144</td>
<td>135-139</td>
<td>125-129</td>
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<tr>
<td>145-149</td>
<td>140-144</td>
<td>130-134</td>
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<tr>
<td>150-154</td>
<td>145-149</td>
<td>135-139</td>
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<td>155-159</td>
<td>150-154</td>
<td>140-144</td>
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<tr>
<td>160-164</td>
<td>155-159</td>
<td>145-149</td>
</tr>
<tr>
<td>165-169</td>
<td>160-164</td>
<td>150-154</td>
</tr>
<tr>
<td>170-174</td>
<td>165-169</td>
<td>155-159</td>
</tr>
<tr>
<td>175-179</td>
<td>170-174</td>
<td>160-164</td>
</tr>
<tr>
<td>180-184</td>
<td>175-179</td>
<td>165-169</td>
</tr>
<tr>
<td>185-189</td>
<td>180-184</td>
<td>170-174</td>
</tr>
</tbody>
</table>

* In order to satisfy the Trust’s carbon reduction strategy, and to safeguard the environment, a maximum CO\(_2\) emissions of 140 g/km will be enforced for personal lease cars.
# LEASE CAR SCHEME APPLICATION FORM

## Part A (to be completed by the applicant)

### 1. Applicant

<table>
<thead>
<tr>
<th>Full Name:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home Address:</td>
</tr>
<tr>
<td>Home Telephone No:</td>
</tr>
<tr>
<td>Department:</td>
</tr>
<tr>
<td>Work Telephone No:</td>
</tr>
<tr>
<td>Work Email address:</td>
</tr>
<tr>
<td>Post Held:</td>
</tr>
<tr>
<td>National Insurance No:</td>
</tr>
<tr>
<td>Staff Number:</td>
</tr>
</tbody>
</table>

### 2. Vehicle Requested

<table>
<thead>
<tr>
<th>Maximum CO2 = 140g/km</th>
<th>1st Choice</th>
<th>2nd Choice</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manufacturers Name:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Model:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Specification/Type:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CC:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Colour (please give 2 for each choice)</td>
<td>1.</td>
<td>2.</td>
</tr>
<tr>
<td>Extras (if any)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Estimated Annual Business mileage (to nearest 1,000)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Estimated Annual Private mileage (to nearest 1,000)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
3. Insurance

Please enclose a photocopy of your driving licence and other drivers’ licences as appropriate.

<table>
<thead>
<tr>
<th></th>
<th>Surname</th>
<th>Forenames</th>
<th>Date of Birth</th>
<th>Length of Time Licence Held</th>
<th>Disabilities</th>
<th>Any accidents or convictions etc. (within last 3 years)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applicant</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>YES/NO</td>
<td>YES/NO</td>
</tr>
<tr>
<td>Spouse</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>YES/NO</td>
<td>YES/NO</td>
</tr>
<tr>
<td>Other Users</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>YES/NO</td>
<td>YES/NO</td>
</tr>
</tbody>
</table>

N.B. Please give details of any physical/mental disabilities, or any accidents, police convictions, etc on a separate sheet.

☐ Please tick box if a separate sheet is attached

I hereby certify that:

All the answers and particulars provided by me in this application are correct; that I have disclosed all material facts; that there are no circumstances known to me at this time that would cause me to terminate the lease prematurely; and

_I have read and accept the conditions of the Trust’s Lease Car Scheme. I agree that if at the end of the contract I have exceeded my estimated private mileage, then I will be personally liable to pay an additional excess mileage charge._

Signed ………………………………………………………

Date: …………………………………………………………………

---

**Part B (to be completed by Manager/Head of Department)**

I certify that the above Applicant is eligible to apply to lease a car under the Scheme rules and, to the best of my knowledge, is expected to remain so for the 3 year lease period.

The official and private mileages projected have been discussed and agreed with the Applicant; I consider the estimated annual official mileage of the Applicant to be reasonable.

Signed: …………………………………… ***

---

This application must now be forwarded to Director of Finance for certification ***

Date: …………………………………… Director of Finance - Signed ……………………………………
New Document Consultation Checklist

Name of Document
HR12 Lease Car Scheme

This form should be used for all new Trust wide guidance and any which will result in significant changes.

Completed forms should be submitted to the Chief Compliance Officer for evidence of compliance with the policy

<table>
<thead>
<tr>
<th>Name – examples (complete with details)</th>
<th>Date Sent</th>
<th>Date reply received</th>
<th>Modification suggested? Y / N</th>
<th>Modification Made Y/N</th>
<th>2nd draft sent?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chief Executive</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medical Director</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chief Operating Officer</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Director of Quality and Safety</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Director of Compliance &amp; Risk Management</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Finance Director</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Counter Fraud Services</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Director of Strategy</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Director of Communications</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Workforce Director</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deputy Director of Nursing</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Centre Chiefs</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business Managers</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Clinical Directors</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Head of Pharmacy</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Patient Safety Advisors</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Litigation Manager</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medical staff</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Service Improvement lead</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Senior nurses</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chief Compliance Officer</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Patient Groups</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Staff side representatives</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Affected staff</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>As per the TNCC circulation List – all managers and staff side representatives, HR team and relevant managers have been asked to comment on the document</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Dissemination Method
Equality Impact Assessment Form
Stage 1 – Initial Assessment

<table>
<thead>
<tr>
<th>Managers Name</th>
<th>Sara Hayes</th>
<th>Centre</th>
<th>Workforce</th>
</tr>
</thead>
<tbody>
<tr>
<td>Function, Policy, Practices, Service</td>
<td>HR12 Lease Car Policy</td>
<td>Purpose and Outcomes – intended and differential</td>
<td>This policy sets out the terms and conditions applicable to lease cars for all eligible Trust employees.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Implementation Date</th>
<th>Who does it affect?</th>
<th>Consultation Process</th>
<th>Communication and awareness</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>All eligible SaTH employees</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

For completion of the following table please see point 7 in the guidance notes.

<table>
<thead>
<tr>
<th>Equality Target Group</th>
<th>(a) Positive Impact</th>
<th>(b) Negative Impact</th>
<th>Reason/Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Men</td>
<td></td>
<td></td>
<td>There are no anticipated positive or negative effects on any particular protected characteristic.</td>
</tr>
<tr>
<td>Women</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transgender</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Black/Black British</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asian/Asian British</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chinese</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>White (including Irish)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other racial/ethnic group (please specify)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mixed race</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Disabled</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gay/Lesbian/Bi-sexual</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Younger People (17-25) and children</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Older People (50+)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Faith groups (please specify)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Following completion of the Stage 1 assessment, is Stage 2 (Full Assessment) necessary? **No**

Date Completed: .9th May 2013. . .Signed by Manager completing the assessment: .Sara Hayes
Please write an executive summary paragraph of the key points of this policy and any changes that have been made since the previous version.

This paragraph will be used for submission to HEC, PAG, Trust Board and for information to go in the Staff Quarterly Update.

This policy has been amended to reflect changes in legislation and amendments to the Agenda for Change Terms and Conditions of Employment Section 17: Reimbursement of Travel Costs.