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SECTION 5 - ALLOWANCES

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SPECIAL NOTES:

SUBSISTENCE ALLOWANCE

As of 1st April 2013 the Council will no longer accept Subsistence Allowance claims where an individual is required to work within the Bradford Metropolitan District.

The only provision for the payment of Subsistence Allowance is where an employee is required to work outside the Bradford Metropolitan District on a non-routine visit, & with the advanced approval of the appropriate senior manager.

PROVISION OF PRIVATE TELEPHONES

Where an officer is provided with a mobile telephone for work, this should be used to make or receive official telephone calls from their private residences. No officer with a council mobile telephone shall be entitled to this allowance except in the unusual circumstances that a mobile signal is not reliably available from their private residence. In these circumstances it is for the Appropriate Director, in consultation with the head of HR, to determine whether this financial assistance should be approved (this will be subject to regular review).

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RATES OF ALLOWANCES

For convenience, the following rates are set out here at the front of the ALLOWANCES SECTION. However, the rates must be used and read in conjunction with the appropriate paragraphs detailing the conditions which need to be satisfied for any particular payment to be made.

1. ORDINARY SUBSISTENCE AND CANDIDATES ATTENDING FOR INTERVIEW (Paragraphs 1(B)(i); 1(C); 1(F)(i)(b))

NOTE: For ordinary subsistence, the amount of the allowance will be in accordance with the following rates. For candidates attending for interview **actual** expenses will be reimbursed up to the following rates as maxima.

	£
Breakfast	4.48
Lunch	6.17
Tea	2.43
Evening Meal	7.64

2. OVERNIGHT PROVISION FOR CANDIDATES ATTENDING FOR INTERVIEW (Paragraph 1(F)(i)(c))

Actual cost of bed and breakfast subject to a maximum of £30.97 per night.

3. TRAINING SCHEME (Paragraph 7)

NOTE: **Actual** costs for meals and lodging will be reimbursed up to the following rates as maxima.

	£
Breakfast	4.48
Lunch	6.17
Tea	2.43
Evening Meal	7.64
Lodging	53.73 per week (67.17 in London)
Bed and breakfast	30.97 per night
Out of Pocket Allowance (Residential Training Courses)	3.63 per night (Up to a maximum of 4 nights) 14.55 per week

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4. TRAINING SCHEME - BOOK ALLOWANCE (Paragraph 7(B)(viii))

NOTE: Actual costs will be reimbursed up to the maximum allowances as follows:

Effective 1 September 2006	£
Day release correspondence/evening course	83.00
Full-time course	145.00

5. RELOCATION SCHEME FOR NEWLY APPOINTED OFFICERS (Paragraph 6)

NOTE: Actual costs will be reimbursed subject to the following maximum allowances.

	£
Global maximum for the whole scheme	5,575.00
Maximum settling-in allowance	600.00

6. TRAVELLING ALLOWANCES FOR TRANSFERRED OFFICERS (Paragraph 8(B) (i) (d))

	£
Excess travelling expenses (Any additional expenses need to be more than this amount.)	2.91 per week

7. MOTOR CAR ALLOWANCES (Paragraph 2(D))

With effect from 1 April 2014:

PROTECTED ESSENTIAL USER	£
Lump Sum per month	£70.50
Lump Sum per annum	£846
Mileage Rate per mile First 652 miles per 4-weekly period or first 708 miles per month (8,500 miles per annum)	35p
After 652 miles per 4-weekly period or after 708 miles per month (after 8,500 miles per annum)	13.7p

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CASUAL USER	
HMRC rate per mile	45p
Each 10,000 business miles in the tax year	25p

8. **MOTORCYCLES (Paragraph 2(B))**

With effect from the beginning of the claim period in which 1 April 2010 falls.

<u>Up to 124 cc</u>	<u>125 cc and over</u>
12.3p	14.5p

9. **BICYCLE ALLOWANCE (Paragraph 3)**

14p per mile.

10. **LEASED CARS (Paragraph 5(C))**

With effect from the beginning of the claim period in which 4 January 2011 falls:

LEASED CARS	451 – 999cc	1,000 – 1,199cc	1,200cc and above
Fuel rate per mile	9.406p	10.366p	11.288p
VAT recoverable per mile	1.567p	1.727p	1.881p

11. **ASSISTED VEHICLE PURCHASE SCHEME AND ASSISTED CYCLE PURCHASE SCHEME (Paragraph 4)**

The maximum vehicle loan is £17,400 or 50% of the officer's annual salary, whichever is the least.

For cycle loans the maximum is £500.

The current interest is calculated on a simple interest basis, on the total loan for the requested period. This is currently variable depending on the cc of the engine as follows:

CC of the engine	Interest rate as at 1 April 2014
451cc – 999cc	2.52%
1000cc – 1199cc	2.77%
1200cc and above	3.05%

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ALLOWANCES

1. TRAVELLING AND SUBSISTENCE

SEE ALSO SPECIAL NOTES (PAGE 4)

A Travelling

Travelling expenses necessarily incurred by officers in the performance of their official duties will be reimbursed, after authorisation, by the Authority.

In respect of rail fares, all officers will be reimbursed 2nd class fares and seat reservation charges only. (See **NOTE 1** below.) In all cases, reimbursement will relate to any available cheap rate or to the ordinary return fare whichever is the lesser. In cases where it is necessary or advantageous for an officer to travel by air or to hire a car or taxi, the actual expenditure (including gratuities) shall be reimbursed.

Travel warrants should be obtained from the appropriate officer of the relevant Department in the cases of officers travelling by rail.

NOTE 1

In certain circumstances it would be reasonable for an officer to travel 1st class. Prior approval must be obtained from the appropriate Director or his/her nominated representative before allowing any officer to travel 1st class.

B Subsistence

As of 1st April 2013 the Council will no longer accept Subsistence Allowance claims where an individual is required to work within the Bradford Metropolitan District.

The only provision for the payment of Subsistence Allowance is where an employee is required to work outside the Bradford Metropolitan District on a non-routine visit, & with the advanced approval of the appropriate senior manager.

C Work at Normal Place of Employment

The allowances set out at the front of this section will also apply to officers working at their normal place of employment but outside their normal hours **and who are above the salary limit for overtime payments**. Claims in respect of tea will be paid if work continues after 7.00 p.m. and claims in respect of an evening meal will be paid if work continues after 8.30 p.m. Tea and evening meal claims will not be paid in respect of the same

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evenings work, except on Saturdays and Sundays. Claims in respect of breakfast will be paid if the work commences before 7.30 a.m.

D Overnight Provision

Officers who are required to make overnight stays in the performance of their official duties will, after prior authorisation, be reimbursed actual expenses in respect of bed and breakfast (including English breakfast).

E Top Management

Separate provisions exist for Top Management and Heads of Service in regard to subsistence expenses and hospitality. Such details are supplied to the individual officers by the Human Resources Department, Advisory Service.

F Expenses of Candidates Attending for Interview

These conditions should be brought to the notice of candidates when the request for their attendance for interview is made.

(i) Expenses shall be as follows:

a) Travel

2nd class rail fare (whether or not the candidate travels by car) or bus fare actually incurred.

b) Subsistence

The level of reimbursement will be limited to the **actual** cost incurred subject to the appropriate maximum subsistence allowance for breakfast, lunch, tea or dinner, as detailed at the front of this section.

In cases where a candidate for appointment is travelling by rail and necessarily takes a meal in a restaurant car, then the actual cost of the standard meal as stated on the menu card will be reimbursed on production of a receipted voucher.

c) Overnight Provisions

Candidates who are required to make an overnight stay will be entitled to claim actual cost incurred in respect of bed and breakfast subject to the maximum amount set out at the front of this section.

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- (ii) Expenses of candidates will be noted at the conclusion of the interview and processed accordingly. Where expenses can be paid immediately from petty cash this should take place. The expenses of all candidates will be paid as soon as possible and any other expenses necessarily incurred will be payable on production of receipted vouchers except for items of a minor nature, e.g. bus fares.
- (iii) In the case of candidates being called from overseas, the expenses will only be paid from the point of landing in the UK.

These conditions should be brought to the notice of candidates when the request for their attendance for interview is made.

Specimen subsistence claim forms can be found at the end of this section.

2 MOTOR CAR ALLOWANCES

A Mileage Claims

Officers requiring the use of a motor vehicle for the efficient performance of their duties will be eligible to receive allowances for the use of their private car on business after being so authorised by the Authority.

B Classification of Authorised Car Users (undertaken by the appropriate Assistant Director or nominated representative.)

1. This agreement provides protection arrangements for some existing essential car users (ECU) who meet the following criteria. Any current employee who is not in receipt of ECU allowance at the date of any agreement will not be subject to these protection arrangements and will be entitled to reimbursement for mileage undertaken whilst on business for the Council at the rate applicable to Casual Car Users.

(i) Criteria for Protected Essential Users (At 1 April 2014)

The criteria for existing Essential Car Users (ECU's) to retain the allowance are one or more of:

- Claimed for 3,000 or more miles in a rolling calendar year part-time workers will have the 3,000 mile criterion pro rated according to their hours of work.
- To be required to respond to work situations at unsocial times (at night, early morning or during a weekend on a frequent and regular basis).

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- When the nature of the journeys makes the use of public transport impractical (whether due to the nature of the work to be done, lone working and other safety considerations, or the amount of travelling to be undertaken) on a frequent basis.
2. Any existing employee retaining ECU allowance as a result of meeting one or more of the above criteria must have a car available for use at work every working day.
 3. There is a single lump sum allowance rate of £846 per annum
 4. Protected ECU lump sums will be pro-rated for part time employees (e.g. a half time employee will receive half of the lump sum allowance).
 5. The mileage rate is 35p per mile for all car users entitled to an ECU allowance.
 6. Any existing Protected ECU who retains the allowance in line with the above criteria will also retain the allowance if they move into a new post provided the criteria are still met.

(ii) Casual Users

These are divided into two categories dependent upon usage.

Class 1 Where regular use of a private car is highly desirable for the efficient conduct of an officer's business.

This allowance is normally attached to a particular post.

Class 2 Where circumstances justify the use of an individual's private car and prior express permission of the individual's supervisor is obtained in advance of the journey being undertaken.

C Rules Governing the Use of Private Vehicles for Official Journeys

(i) Authorisation

Car allowances are only payable to officers authorised by the Council to use their private cars in the performance of official duties.

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(ii) Mileage Claimable

- a) Public transport must be used on all occasions where it would be more advantageous to the Authority in travelling time/costs.
- b) Officers shall not use their cars on journeys where there is room in one of the Authority's official cars, or in the car of another officer making the same journey on the same business. As far as possible journeys over the same route by officers of a Division should be arranged so as to synchronise.
- c) Only mileage on "official" journeys may be claimed. This will normally be from the officer's place of work and only for journeys within the Authority's boundary or those outside the area of the Metropolitan District Council which are to or from establishments of the service or undertaking.

Examples of the types of journey are as follows: -

- i. *Office - Site(s) - Office* - Actual mileage will be payable.
- ii. *Home - Site(s) - Office OR Office - Site(s) - Home* - Only the excess mileage will be payable i.e. the net mileage after the normal mileage from home to office has been deducted.
- iii. *Home - Site(s) - Home* - By special permission in advance from the appropriate supervisory officer. The amount payable will be the lesser of *Home - Site(s) - Home OR Office - Site(s) - Office*.
- iv. Any other journey specially approved by the appropriate Authorised Officer or nominee, in advance, and notified to the officer responsible for the examination of claims.

NOTE: Claims in respect of other journeys outside the Authority's boundary will be limited to the equivalent rail fare unless the full rate can be justified on the grounds that:

- i. The relative costs of car to public transport are favourable and/or
- ii. Official passengers are being carried and/or
- iii. Prolonged absence from the office and/or accommodation charges will be avoided.

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- d) No allowance will be paid for "home to office" journeys, and vice versa, except in the case of extra journeys which may be necessary for official duties outside normal working hours, or other special circumstances as defined, in advance, by the appropriate Authorised Officer or nominee.

(iii) Passengers

The Council has the right to require an officer to carry official passengers without additional payment.

(iv) Records and Claims

- a) Officers must maintain a record of all journeys on the official form provided. (A specimen copy can be found at the end of this section). Each journey must be entered separately in the order in which it occurs. Milometer readings (not "trip" readings) must be stated and sufficient details must be given to enable all entries to be verified, including starting, intermediate and finishing points. An indication of the time when the journeys are made should be given (e.g. morning, afternoon, evening).
- b) Claims must be submitted to the Authorised Officer or nominee of the appropriate Department as soon as possible following the last day of the claim period in order that the payroll deadline can be met. All claims must be made on the official form. (a specimen copy can be found at the end of this section). If the mileage is less than 100 miles per period, claims may be submitted up to 3 periods in arrears.

(v) Insurance

For all officers using a vehicle on Council business it is a requirement that:-

- a) The insurance extends to cover the person using the vehicle.
- b) The insurance covers use of the vehicle on Council business by the person using the vehicle.
- c) They shall have included and maintain in their policy of insurance a clause indemnifying the Authority against all third party claims (including those concerning passengers) arising out of the use of the vehicle on official business, providing that this requirement shall not apply where an undertaking has been given by an insurer to the Authority or the appropriate Association of Local Authorities.

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D Motor Car Allowances

- (i) The approved allowances for authorised car users using their private vehicles on Council business journeys are set out at the front of this section.
- (ii) The period over which car allowances are paid is from April in any year to the succeeding March.
- (iii) Where a car is not in use as a result of a mechanical defect or the absence of the officer through illness (for maternity leave see ((c) below) : -
 - a) For Protected Essential Users, the lump sum payment should be paid for the remainder of the claim period in which the car first became out of use and for a further three claim periods thereafter. For the following three claim periods, payment should be made at the rate of 50% of the lump sum payment.
 - b) During the period when the car is "off the road" for repairs, out-of-pocket expenses in respect of travel by other forms of transport should be borne by the Authority.
 - c) For Protected Essential Users who are on maternity leave the 4-weekly/monthly lump sum payment should be paid for all of the Ordinary Maternity Leave i.e. for the first 26 weeks. Thereafter, during any Additional Maternity Leave, the lump sum payments should cease.

Where an officer has been absent through illness and shortly after returning to duty the officer is again absent through illness for some time, the officer's sickness absence should be aggregated for the purpose of deciding whether the lump sum should be abated.

Thus, for example, if an officer is absent through sickness for five months, returns to duty for two months and then has another lengthy absence through sickness there is no requirement for the abatement to be delayed for a further three claim periods.

E Motor Cycles

Allowances are paid to officers who are eligible for motor car allowances but use a motor cycle instead.

The rates of allowance are set out at the front of this section.

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3. BICYCLE ALLOWANCE SCHEME

A Introduction

This scheme has been introduced as part of the move towards sustainable development and as a positive environmental/health feature. The intention is to encourage more employees to use their own private bicycles whilst undertaking official duties by providing an incentive to use a bicycle for official journeys instead of a motor vehicle by virtue of a bicycle allowance to financially compensate the individual for the expenses incurred.

B Scope

- (i) All officer and craft/manual employees are eligible to be included in the Bicycle Allowance Scheme as follows: -
 - ◆ All designated Protected Essential and Casual Class 1 Car Allowance Users.
 - ◆ Other employees where circumstances justify the use of their private bicycle and prior express permission of an individual's supervisor is obtained in advance of the journey being undertaken.
- (ii) It will not be possible or practical to use a bicycle for all official journeys and therefore employees will be able to claim for public transport or car or bicycle allowance dependent on what form of travel is used for any particular official journey.
- (iii) Where Protected Essential Car Users continue to use their private vehicles on official journeys then they will continue to receive their lump sum payments irrespective of the number and length of journeys made by bicycle.

C Level of Allowance

For official journeys undertaken by the use of an employee's private bicycle the mileage allowance is as set out at the front of this section.

D Authorised Journeys

- (i) Bicycle allowance is only payable to employees authorised in accordance with the terms of this scheme to use their private bicycles in the performance of official duties.
- (ii) Public transport must be used on all occasions where it would be more advantageous to the Authority in travelling time/costs.

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- (iii) The use of a bicycle will be permitted providing that productivity and efficiency are not reduced. Practical and health and safety considerations will include: -
 - ◆ The length and likely duration of the journey.
 - ◆ The need to make several site visits in a day.
 - ◆ The need to transport bulky or heavy materials.
 - ◆ Adverse weather conditions.
- (iv) Employees must have regard to the above criteria when deciding if the circumstances justify the use of their private bicycles. Supervisors /management have final discretion to decide if it is in the interests of the Authority to make certain journeys by bicycle.

E Mileage Claims

- (i) Bicycle mileage claims are based on the estimated mileage of each journey, unless a milometer has been fitted to the bicycle, in which case the recorded mileage is claimable. Estimated mileage can be assessed by agreed standard distances for certain journeys or by reference to previous car journeys.
- (ii) Mileage on "official" journeys may be claimed. This will normally be from the employee's place of work. Examples of the types of journey are as follows: -
 - ◆ *Workplace - site(s) - workplace* - Actual mileage will be payable.
 - ◆ *Home - site(s) - workplace or workplace - site(s) - home* - Only the excess mileage will be paid i.e. the net mileage after the normal mileage from home to workplace has been deducted.
 - ◆ *Home - site(s) - home* - By special permission in advance from the appropriate supervisory officer. The amount payable will be the **lesser** of home - site(s) - home **or** workplace - site(s) - workplace.
 - ◆ Any other journey specially approved by the appropriate Authorised Officer, or his/her nominee, in advance, and notified to the officer responsible for the examination of claims.
- (iii) No allowance is payable for home to workplace journeys and vice versa, except in cases of extra journeys which may be necessary for official duties outside normal hours or other special circumstances as

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defined, in advance, by the appropriate Authorised Officer or his/her nominee.

- (iv) Employees must maintain a record of all cycling journeys on the official record of journeys form provided for journeys undertaken by bicycle and thereby keep such records separate from any motor vehicle journeys. Each journey must be entered separately in the order in which it occurs. Sufficient details must be given to enable all entries to be verified, including starting, intermediate and finishing points, and an indication of the time when the journeys are made should be given (e.g. morning, afternoon, evening).
- (v) Claims should be submitted as soon as possible following the last day of the claim period in order that the payroll deadline can be met. All claims must be made on the official bicycle allowance claim form. (A specimen copy is at the end of this section).

F Insurance

- (i) The Council's insurance provides cover for employees using bicycles during official duties in respect of public liability, e.g. highway accidents where a third party sustains damage to property due to the fault of the cyclist.
- (ii) The scheme does not cover loss or damage to bicycles, accessories and personal effects and therefore such incidents are the employee's responsibility. Employees are encouraged to effect, if they so wish, their own insurance provision to cover such loss or damage. Household contents insurance usually covers, or can be adapted to cover, loss or damage to bicycles provided it does not exclude use for business purposes.

G Safety

- (i) It is recommended that employees take appropriate steps to improve their safety whilst using a bicycle, such as wearing bright clothing to be seen more easily.
- (ii) A bicycle should not be used if equipment/materials/documents to be carried cannot be attached safely to the bicycle or safely carried on the person.

4 ASSISTED VEHICLE PURCHASE SCHEME & ASSISTED CYCLE PURCHASE SCHEME

A Conditions of Application

Extract from the Council's Personnel Manual (Blue Book – Section 5/pages 1 to 46)

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Any officer who the Authority resolves is eligible for Protected Essential or Casual (Class 1) car allowance in the interests of the efficient conduct of the business of the Authority, shall be permitted to use his/her private car, motorcycle or cycle in carrying out his/her official duties, and that officer shall be eligible for financial assistance in accordance with either of these Purchase Schemes.

The Authority may on receipt of an application for financial assistance from any such officer, and subject to the terms and conditions of the schemes, authorise the grant of a loan.

Full details of the schemes and the procedures to follow if intending to apply can be obtained from the Human Resources Department, Advisory Service or the Vehicle Loans Section of the Department of Customer Services. The maximum amount of any loan is set out at the front of this section.

5. RELOCATION SCHEME FOR NEWLY APPOINTED OFFICERS

A The Scheme

- (i) This relocation scheme is for all officers newly appointed to permanent posts with the City of Bradford Metropolitan District Council. Officers newly appointed to the Council in temporary posts or on fixed term contracts may also be reasonably considered, subject to a clear understanding on the repayment clause below.
- (ii) The Director of Finance shall in all cases be satisfied that the expenditure which an officer incurs in connection with any part of this scheme is necessary expenditure and has been approved in advance by the appropriate Human Resources Officer or Administrative Officer of the Department in which the officer is employed.
- (iii) The Council shall ensure that decisions under the above are given with the minimum of delay.

B Eligibility Conditions

A newly appointed officer will qualify for assistance under the scheme, providing that: -

- (i) S/he lives more than a radius of 25 miles from his/her new place of work and outside the area of the City of Bradford Metropolitan District Council.
- (ii) The removal is over a distance of not less than a radius of 10 miles from the officer's old home and results in being nearer the new place of work.

Extract from the Council's Personnel Manual (Blue Book – Section 5/pages 1 to 46)

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- (iii) The removal is to a point within a 25-mile radius of the place of duty or, for those with a variable work base, to a point within 25 miles of the Department's headquarters.
- (iv) The removal takes place within 12 months of taking up the appointment.

Unless a newly appointed officer satisfies all the above conditions, s/he cannot claim any of the following entitlement.

However, in exceptional circumstances, the Principal Human Resources Manager (Advisory), in consultation with the appropriate Director (or nominee), has discretion to waive any of the above conditions.

C Entitlement

Any officer who qualifies under the above is entitled to be reimbursed the actual cost of relocation up to the global maximum set out at the front of this ALLOWANCES Section. The allowance is payable for any combination of items under the headings listed below:-

(i) Removal Expenses

- a) Actual necessary cost of removal of furniture and effects from old home to new including insurance of goods in transit.
- b) Subsistence allowances and travel expenses for the officer and family/dependants from old home to new at either 2nd class rail fare or at the Protected Essential Car User mileage allowance, whichever is actually incurred.
- c) Any necessary cost of storage for furniture and effects where a permanent move cannot be made immediately.
- d) When an officer moves home s/he will be granted 2 working days leave with pay.

(ii) Excess Travel Expenses

An officer who chooses to commute from his/her old home to the new place of work, pending removal, can claim actual reasonable expenditure equal to the difference between the cost of travelling from old home to old work place and that of the journey from old home to new workplace. This allowance to be paid from the date of appointment for up to 26 weeks at either 2nd class rail fare or car mileage allowance at the Protected Essential Car User mileage allowance.

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(iii) Lodging Allowance

An officer who is unable to move house immediately to within reasonable distance of his/her new place of employment and has therefore to find temporary accommodation for him/herself, thereby incurring additional expense through running two households/having two sets of living expenses, can claim the actual necessary cost of bed, breakfast and evening meal for up to 26 weeks from the date of appointment.

Officers wishing to lodge for part of any week and return home for the other part of the same week can claim actual cost of lodging incurred as per above, plus actual cost of one return journey home as per the rates under 6(C)(ii), again for up to 26 weeks from the date of appointment.

(iv) Legal and Other Fees Connected with Moving Residence and Any Unsuccessful Bona Fide Attempts to Remove

- a) Actual cost of legal fees, survey fees, estate agents and mortgage redemption fees, involved in selling and/or buying a house.
- b) Where house agents or auctioneers are not engaged, the officer can claim actual cost of expenditure incurred on e.g. advertising.
- c) Actual cost of any legal fees involved in taking up a new tenancy and/or actual loss of rent advanced on any previous tenancy.

(v) Settling-in Allowance

Actual necessary cost of re-establishing essential services such as gas, electricity, water and telephone; installing appliances like washing machine and cooker; and/or altering/replacing carpets and curtains for the new home, up to the maximum set out at the front of this ALLOWANCES section.

Whatever options are chosen under paragraphs 6(C) (i) - (v) are subject to the global maximum and must be supported by receipts as far as possible. There will be no exceptions to the provisions contained in these paragraphs or the global maximum.

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D Repayment of Allowance

Any officer leaving the Authority for any reason other than death, redundancy or ill-health retirement, after receiving payment under the above scheme must repay a proportion of the allowance received as follows: -

- (i) Leaving within 12 months of appointment - 100%
- (ii) Leaving between 12 - 24 months of appointment - 75%
- (iii) Leaving between 24 - 36 months of appointment - 50%

In other exceptional circumstances the Principal Human Resources Manger (Advisory) in consultation with the appropriate Director (or nominee) has discretion to waive wholly or in part the above repayment conditions.

E Specimen Claim Form

A specimen claim form for the Relocation Scheme for Newly Appointed Officers can be found at the end of this section.

6. TRAINING ALLOWANCES

A Training Allowances

The following scheme sets out the allowances payable, costs to be borne and the criteria under which repayment will be made for those undergoing training programmes approved by the Authority.

The employee should in all cases enter into a signed agreement with the Authority before commencing the course. A specimen copy of this agreement can be found at the end of this section.

NOTE:

- (1) Definition of Normal Pay
 - (a) Normal Pay for the purpose of this scheme shall be taken to include enhancement to pay as part of the normal working week, and/or contractual overtime.
 - (b) No employee shall be financially penalised as a consequence of attending training courses. Enhancements paid on a contractual basis, such as shift allowance, night rate, unsocial hours, weekend work etc, will continue to be paid during attendance(s) on training programmes.
- (2) Current Allowances

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Actual expenditure will be reimbursed as set out in this scheme up to the maximum within the National Agreements. The current rates are detailed at the front of this section.

B General Conditions

(i) Claims

Claims for expenses will only be considered if the course is approved by the Authority. Claims shall be submitted to the appropriate certifying officer for approval on the appropriate Post Entry Training Application for Expenses/Claim Form. A specimen copy of this form can be found at the end of this section.

(ii) Criteria for repayment of expenses

These are the circumstances in which training expenses will be required to be repaid: -

- a) When an employee sponsored on a full-time, sandwich course or course of study leading to a professional qualification does not remain with the Authority for two years after completion of the course.
- b) When a student having been given facilities does not attend the course of study without good reason.
- c) When a student without good reason fails to sit the examination for which s/he has been studying.
- d) When a student has not, even though s/he may have attended the course and sat the examination, pursued his/her course diligently as evidenced, for example, by college reports.
- e) Additionally, a Department may require individuals attending specific courses to repay training expenses where the course involves a high cost and/or investment of time significantly greater than that which applies in the case of day release courses. Repayment will only apply where a student fails to comply with the conditions set out in a) to d).

(iii) Amount to be repaid

Fifty per cent of the full amount of training expenses, not including salary/wages, associated with the qualification for which the individual was given assistance, will be required to be repaid if the individual leaves this Authority to take up employment in another local authority. In other cases the full amount is to be repaid.

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(iv) Waiving of the provisions to repay training expenses

In exceptional cases the appropriate Director or his/her nominated representative will use his/her discretion in the application of this policy.

(v) Second Attempts

A second attempt with normal financial assistance at a course/exam may be allowed if the circumstances are considered to be reasonable. If a student has not attended, a second attempt will not be allowed.

(vi) Further Attempts

Further attempts may be allowed at the discretion of the appropriate Director or nominated representative. In these circumstances, an employee may be given time off to study but the re-sit must be at his/her own expense. If, at the third attempt, the course/ examination are successfully completed, then the Authority will reimburse previously approved fees.

(vii) Pre-Examination Leave

The appropriate Director or nominated representative may authorise pre-examination leave for employees studying for approved qualifications, except where the course is full-time, sandwich or block release, on the following basis: -

Day release: One half day for each written examination paper, up to a maximum of one week in any academic year;

Other courses: (including approved Correspondence Courses)
One day for each written examination paper, up to a maximum of one week in any academic year.

(viii) Books

Where books are an essential requirement of the course, the Authority will lend approved textbooks to employees for an agreed period up to the duration of the course. In the event of the Central Library or the Divisional Library being unable to supply a particular book, the employee may, with prior approval, purchase the book and reclaim the full purchase price up to the maximum allowance detailed at the front of this section.

Extract from the Council's Personnel Manual (Blue Book – Section 5/pages 1 to 46)

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The Authority reserves the right to require any books purchased to be returned at the end of the course.

Book allowances will be updated annually, prior to the commencement of each new academic year, the new rates applying from 1 September.

(ix) Policy on Trips

a) The Authority will not pay costs for any trips, either for travel or expenses.

b) Subject to management agreement to release a student (taking into account staffing levels, workload etc), the Authority will grant paid leave in excess of normal annual leave.

(x) Training for Part-Timers

Part-timers on any approved training courses outside their contracted daily hours should be paid on the same basis as full-timers. This means any part-timer will be paid, or granted time off in lieu at management's discretion, not only for undertaking training within his/her normal working hours, but also for any actual hours training undertaken outside these hours, providing that training falls within the same working pattern as his/her notional full-time equivalent post.

All fees, travelling expenses and subsistence etc., will be paid in accordance with those of full-time employees.

C Approved Day Release and Evening Courses

(i) Normal Pay (refer to definition of normal pay - **NOTE (1)** at beginning of this Training Scheme).

(ii) Course fees, including tuition and examination fees.

(iii) Other expenses which the student is required by the examining body to incur as part of the course.

(iv) Travelling costs by Second Class rail or bus to and from college in excess of normal costs incurred in travelling to and from work. The student will be expected to use the most economical means, including Metro Cards and season tickets.

(v) The Authority will reimburse the cost of actual subsistence expenditure (i.e. lunch and/or tea) incurred by a student required to attend a course outside the Bradford Metropolitan District Area.

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Actual expenditure will be reimbursed up to the maximum within the National Agreements.

- (vi) The Authority will supply stationery.

NOTE: The appropriate Director or nominated representative may in **exceptional** cases authorise claims for stationery. No claims can be met for special papers, drawing equipment, slide rules and other equipment.

- (vii) The Authority undertakes to have projects/theses typed in full, save that, if this is not possible within the Department, the appropriate Director or nominee may authorise claims for this expense.

D Approved Correspondence Courses/Distance Learning Qualification Courses

- (i) Course fees, including tuition and examination fees.
- (ii) Subsistence (up to the maxima under the National Agreement) and second class travelling expenses when a student is required to attend for examination outside the Bradford Metropolitan District Area.
- (iii) Study leave will be provided for employees undertaking an approved correspondence/distance learning course. Leave with pay will be on the basis of 1 day per week during each academic term. The total annual study leave granted must not exceed that allowed to students attending day release courses at academic institutions, i.e. 33 days.

E Full-time, Block Release or Sandwich Courses Associated with an Approved Qualification

- (i) Normal pay (refer to definition of normal pay - **NOTE (1)** at the beginning of this Training Scheme).
- (ii) Course fees, including tuition and examination fees.
- (iii) Other expenses which the student is required by the examining body to incur as part of the course.
- (iv) Second class fares at the beginning and end of term to and from college and one other return journey per term.
- (v) The cost of daily travel by public transport from accommodation to college, in excess of the normal home-to-work return journey. Also any travelling costs incurred whilst on placements.
- (vi) Lodging Allowance

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- a) **Actual** cost incurred up to the maximum allowed as detailed at the front of this section.
- b) Holding Payments - all employees - the appropriate Director or his/her nominated representative may authorise the payment of an allowance up to the maximum under a) above to enable the employee to retain accommodation during the vacation period.
- c) The appropriate Director or his/her nominated representative may authorise alternative allowances for employees who find difficulty in obtaining permanent accommodation, e.g. because of the nature, location or duration of the course.
- d) Where an employee is entitled to a lodging allowance but chooses to travel daily to the course, travelling costs will be paid, up to a maximum of the weekly lodging allowance payable under a) above.

(These payments will be increased at the same time as other travelling and subsistence rates in line with National Agreements.)

F Approved Open University Courses

(i) Vocational

A vocational course is defined as a course (not necessarily the whole degree course) whose examination qualification is approved by the Authority for the particular post held by the employee or when content is directly related to the work content of the post.

- (a) Full reimbursement of registration, examination and tuition fees.
- (b) Normal pay when on leave of absence for summer school and examinations held during office hours.
- (c) Books (see 7(B) (viii)).

(ii) Non-Vocational

A non-vocational course is defined as any approved course not falling within the category (i) above.

- a) Examination fees (reimbursable in the event of the exam being passed).

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- b) Normal pay when on leave of absence for summer school and examinations.

NOTE: The granting of facilities and allowances for these courses are for one attempt only at each subject, and in any case must not extend for more than six years.

G Short Development Courses

- (i) Normal pay (refer to definition of normal pay - **NOTE (1)** at beginning of this Training Scheme).
- (ii) All fees, etc., arising directly from the course.
- (vii) Second class travelling expenses in excess of normal cost incurred in travelling to and from work. Approved subsistence expenses will be paid when an employee is required to attend a course outside the Bradford Metropolitan District Area.

For courses held within the Bradford Metropolitan District Area no subsistence allowance will be paid.

Actual expenditure will be reimbursed up to the maxima within the National Agreements except: -

- (a) Where the expenses are higher because of course arrangements.
- (b) Where hotel bills include meal charges, the bill should be forwarded to the Authority for payment. Charges for drinks, telephone calls and other personal expenses must be paid by the employee before leaving the hotel.
- (iv) When the course spans a weekend but no weekend residential work is required, the employee may: -

Either, return home and claim travelling expenses

Or, remain at the location and claim subsistence allowance up to the maximum under the National Agreement.

- (v) **Out-of-pocket Allowance for Residential Courses**

An out-of-pocket allowance may be claimed in accordance with the rates laid down in the National Agreement (see front of this section).

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H Awards for Approved Qualifications

To recognise individuals who achieve certain qualifications, the Authority will grant awards upon successful completion of the following:

BTEC General		£ 45
BTEC National Year 1	] <u>OPTIONS</u>	£ 45
	] Business/Finance	
BTEC National Year 2	] Computer Studies	£100
	] Housing	
BTEC Higher National Year 1	] Environmental Studies	£ 60
	] Public Administration	
BTEC Higher National Year 2	]	£100

7. TRAVELLING ALLOWANCES FOR TRANSFERRED OFFICERS

A Scope

- (i) The provisions for travelling allowances contained in Appendix E to the National Scheme of Conditions of Services shall be applied as set out in this scheme to Bradford Metropolitan District Council officers whose administrative centres are changed by circumstances beyond their control, **if these changes are not referred to in their conditions of employment.** (Excludes changes due to any reorganisation of local authority areas.)
- (ii) The Finance Director shall, in all cases, be satisfied that the expenditure which an officer incurs in connection with the items mentioned in this scheme is necessary expenditure **and has been approved in advance** by the appropriate Authorised Officer of the Department in which the officer is employed.
- (iii) The Council shall ensure that decisions under (ii) above are given with the minimum of delay.
- (iv) For the avoidance of any doubt, no officer working for the Council shall be forced to move house or will qualify for any assistance regarding house removal should he/she voluntarily decide to do so.

B Officers whose places of employment are changed by circumstances beyond their control

This heading covers staff whose place of employment is changed within the service of Bradford Metropolitan District Council.

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The following is the allowance to apply in these circumstances:

(i) Excess Travelling Expenses

An officer incurring additional travelling expenses will be paid an allowance equal to the difference between the cost of travelling: -

- a) From his/her home to his/her new place of work and
- b) From his/her home to his/her old place of work.

Such allowance to be paid for a period of four years at the full rate and to be based on either: -

- c) Second class train and/or bus fares up to the limit of the cost of any weekly Metro-card. (Where a Metro-card is unobtainable, actual excess costs will be reimbursed.)

Or

- d) Mileage allowance in respect of the additional mileage actually involved in the change of place of employment if the officer is an authorised car user (i.e. Casual Class 1 or Protected Essential User) or where public transport is not available. (Where mileage allowance is payable it will be calculated using the Protected Essential User mileage rate.)

Whichever is actually incurred.

NOTE: This agreement applies only where the difference between the cost of travelling (both ways) from home to the new place of work and from home to the old place of work is more than the amount set out at the front of this section.

- e) In considering claims for excess travelling allowance the appropriate Director or his/her nominated representative may take account of car mileage by the most reasonable route or the reasonable availability of public transport.
- f) The Council will, where practicable, consider the provision of a local bus service where groups of staff are involved and there is a lack of suitable public transport arrangements. In this eventuality payment under c) or d) will cease except in the case of officers who are required to bring their vehicles to work.

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8. REIMBURSEMENT OF SUBSCRIPTIONS TO PROFESSIONAL ORGANISATIONS

- A The cost of practising certificates which are essential to enable the officer to perform his/her official duties are reimbursed in all cases.
- B Officers obtaining admission to a professional association by way of examination will have the first year's subscription paid by the Council.
- C All students will be reimbursed subscriptions whilst membership of a professional body is a pre-requisite for the course being attended.

9. PROVISION OF PRIVATE TELEPHONES

SEE ALSO SPECIAL NOTES (PAGE 4)

- A The nature of business to be conducted by a number of officers will require them to make or receive official telephone calls from their private residences. Such situations will arise where: -
 - (i) The officer is involved in stand-by or other call-out arrangements which operate outside normal working hours.
 - (ii) The officer regularly participates in official telephone calls from his/her private dwelling, possibly because he/she has no static work location and therefore the only reliable point of contact is his/her home.
- B Accordingly it has been agreed that: -
 - (i) The appropriate Director is authorised to determine which posts have duties which would qualify the postholder for financial assistance in respect of his/her private telephone.
 - (ii) The financial assistance will be the reimbursement of installation and rental charges together with the actual costs of any calls made for official purposes.

NOTE 1 Reimbursement of installation and rental charges for extension bells when these are necessary will be made to officers who are required to be on call.

NOTE 2 Officers who are authorised telephone users will **not** be reimbursed any installation charges for a telephone if they subsequently move home.