

## Motor Vehicle Policy (previously known as 'Fleet Policy')

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| <b>CATEGORY:</b>   | Policy   |
| <b>CLASSIFICATION:</b>   | Governance   |
| <b>PURPOSE:</b>  | To set out the principles for the management of the Trust Fleet                              |
| <b>This Document supports:</b>   | To comply with the Health and Safety legislation, in particular the vehicle as a 'workplace' |
| <b>Controlled Document Number:</b>   | 544  |
| <b>Version Number:</b>   | 3.3  |
| <b>Controlled Document Sponsor:</b>  | Director of Corporate Affairs  |
| <b>Controlled Document Lead:</b>   | Deputy Foundation Secretary  |
| <b>Approved By:</b>  | Chief Executive Advisory Group   |
| <b>On:</b>   | October 2016   |
| <b>Review Date:</b>  | October 2019   |
| <b>Distribution:</b>   |  |
| <ul style="list-style-type: none"> <li>• <b>Essential Reading for:</b></li> <li>• <b>Information for:</b></li> </ul> | <p>All Directors, Senior Managers and Department Heads</p> <p>All Staff</p>                  |

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## Definitions

|   |  |
|---|--|
| Driver Permit                                 | Permit issued by the Facilities Manager to indicate that a driver has been authorised to drive a "Trust Vehicle".  |
| Finance Tools Online System ('Finance Tools') | The system the Trust uses to claim and authorise all expenses incurred. The Finance Tools online system will calculate mileage based upon the shortest route for Official Business Journeys (definition below). If the mileage travelled does not match this because the staff member has had to make a detour due to road works, diversions, etc., the number of miles that the system gives can be overwritten. If this is done the staff member must provide an |

|                              |   |
|------------------------------|---|
|                              | explanation for the additional miles travelled in order that the Authorising Manager can understand the reasons for this.   |
| Official Business Journey    | Journeys that are carried out during the course of the employment, i.e. journeys that have been expressly or implicitly authorised by the Trust in order to carry out or further Trust business, but excluding the commute to and from home to the employee's usual workplace. The term "Official Business Journeys" includes journeys to meetings/training sessions away from the usual work place and excludes the commute between the usual work place and home. |
| Place of Residence           | This will be the residence Trust staff have submitted as their main place of residence for the purposes of receiving Trust paperwork including, but not limited to, payslips and P60's.   |
| Private Driver               | <p>Drivers who use private vehicles for Trust business. An employee is driving during the course of his/her employment when driving to a business meeting, training session or workplace away from the usual workplace.</p> <p>These drivers must ensure they have appropriate business cover insurance in place. This will be checked as part of the expenses claim process.</p>   |
| Private Vehicle              | Employees who use their own private or hire car used for "Official Business Journeys".  |
| Trust Fleet Insurance Policy | The motor insurance policy that covers all Trust Vehicles.  |
| Trust Fleet Log Book         | A log book of all Trust Vehicles detailing make, model year and registration number of all Trust Vehicles, as well as the name and Driver Permit number of any Trust Vehicle Driver.  |
| Trust Vehicle                | Vehicles that are either owned or leased by the Trust and are allocated and/or managed by the Trust.  |
| Trust Vehicle Driver         | <p>Employees of the Trust who are drivers driving a Trust Vehicle as opposed to a Private Vehicle.</p> <p>Employees are driving a vehicle in the course of their employment where they have been authorised, implicitly or expressly, by the Trust to carry out or further Trust business.</p>  |
| Trust Vehicle Manager        | All Managers who authorise the use and allocation of Trust Vehicles. Each department that uses one or more Trust Vehicles will appoint a Trust Vehicle Manager.   |

## **1. Policy Statement**

- 1.1 University Hospitals Birmingham NHS Foundation Trust (the “Trust”) is responsible for the health and safety of its employees whilst at their place of work (Health and Safety at Work etc. Act 1974). Any vehicle in which an employee carries out business on behalf of the company or their employer is regarded as a place of work and is therefore subject to the current legislation. It follows that the Trust is required to carry out an assessment of the risks to the health and safety of its employees, while they are at work, and to other people who may be affected by their work activities.
- 1.2 Furthermore, under the legal principle of “Vicarious Liability” the Trust is jointly liable for any negligent actions or omissions of their employees “during the course of their employment”. In other words, Third Parties, who have sustained a loss or injury through the negligence of a Trust employee, driving a vehicle “during the course of his/her employment”, can claim full compensation from either the employee of the Trust or the Trust itself.
- 1.3 The purpose of the Motor Vehicle Policy is to provide the framework for an efficient and adequate management of “Trust Vehicles” (vehicles owned or leased by the Trust) and “Private Vehicles” (private/hire cars used for Official Business Journeys) with a view to complying with the legislative requirements outlined above.
- 1.4 This policy is supported by the Licence Check Procedure and the Drivers’ Manual.

## **2. Scope**

This policy applies to all areas of the Trust and anyone who drives a Trust Vehicle or a private or hire car for Official Business Journeys including employees formally employed by the Trust, those employed by the Trust on an honorary contract, and in certain circumstances contractors, locum staff and agency staff.

## **3. Framework**

- 3.1. This section describes the broad framework for the management of the Trust Fleet to ensure that the Trust complies with its statutory duties as set out in Section 1 above.
- 3.2. The Director of Corporate Affairs shall approve all procedural documents associated with this policy, and any amendments to such documents, and is responsible for ensuring that such documents are compliant with this policy.

3.3. The framework is divided into the following sub-sections:

- Trust Vehicle Driver authorisation
- Authorising Official Business Journeys
- Journey time to and from work
- Principles of licence checking
- Principles of Trust Vehicle allocation
- Permitted and prohibited use of Trust Vehicles
- Accidents
- Insurance
- Driver training
- Trust Vehicle maintenance and servicing
- Fleet management

3.4. Authorising Official Business Journeys

3.4.1. A member of staff, contractor, agency worker or locum staff may be authorised by the Trust to use a private car or hire car for Official Business Journeys, provided the following conditions are met:

- **Driving Licence:** The individual in question holds a valid and current driving licence;
- **Business insurance cover:** Where the individual is using his own private vehicle, he/she has in place a motor insurance policy which covers 'business use' for the amount and type of mileage, he/she undertakes and, if necessary, covers 'business passengers' – together referred to as 'business cover'. Most car insurance policies will cover a car for 'social, domestic and pleasure' (SDP) use and commuting. This covers the normal day-to-day use of a vehicle for travelling to and from work, trips to the shops, visiting friends and family, etc. While this type of policy does insure the individual for travelling to his/her regular place of work, it does not offer cover for

any further business travel. 'Business cover' normally takes one of the three forms:

- **Private and occasional business use:** This covers private use, commuting and also includes use for occasional business purposes by the regular driver or spouse. However, the vehicle must not be registered for business use and must not be an essential part of earning income.
- **Private and business use:** This insures all of the features listed above, but with the addition of business use for the regular driver, spouse or any named driver on the insurance policy.
- **Commercial travelling:** This covers a policyholder for whom travelling in their own vehicle is a regular part of their job, such as a door-to-door salesman.

3.4.2. Where the individual is planning to use their own private car/hire car for an Official Business Journey (Private Vehicle), irrespective of whether they intend to claim expenses for Official Business Journeys, they must register with Finance Tools and submit a copy of a valid insurance certificate, as set out in 3.5.1 above, to the Expenses Team before the journey. The appropriate mileage allowance includes the additional costs of taking out 'business cover'. Employees must not use their own private car/hire car for an Official Business Journey without complying with this.

3.4.3. Where the individual is an agency worker or temporary staff, Line Managers must check with the agency/principal employer whether they have carried out the licence and insurance checks for the individual involved. In case of doubt, Line Managers will obtain the consent of the agency/principal employer to the Official Business Journey so as to ensure that the Trust can recover any losses from the agency/principal employer, in case there is an accident through the negligence of the Private Driver.

### 3.5. Journey time to and from work

3.5.1. Where staff do not have a fixed place of work, the time spent by those staff travelling each day between their Place of Residence and the first and last destination designated by the Trust will constitute as working time as set out in the European Working Time Directive.

3.5.2. For staff who have a fixed place of work but are required to travel to another destination designated by the Trust, the additional time travelled (the travel time from their Place of Residence to the designated destination minus their usual travel time from their Place of Residence to and from their fixed place of work), will constitute as 'working time' as they will be deemed to be at the Trust's disposal for the time of the additional journey.

### 3.6. Trust Vehicle Driver authorisation

3.6.1. A Trust Vehicle Manager may authorise a member of staff to become an authorised Trust Vehicle Driver, provided the applicant meets the following requirements:

- a) Be employed by the Trust by contract of employment;
- b) Be of 21 years of age or over;
- c) Be in possession of a full driving licence (UK, Irish or EU) for at least 2 years with no more than 3 penalty points endorsed at the time of issue of the Driver Permit;
- d) Where Trust Vehicle Drivers have more than 3 points but less than 6 points at the time of issuing the Driver Permit, the Facilities Manager will liaise with Corporate Affairs to decide whether a discretionary decision may be made, considering the impact of the service;
- e) For Trust Vehicle Drivers who are in possession of a foreign licence, the Trust Vehicle Manager will need to liaise with the Deputy Foundation Secretary that they will be covered under the Trust Fleet Insurance Policy;
- f) Has signed the Drivers' Declaration Form attached to the Drivers' Manual to confirm that he/she has read and understood the content of the manual;
- g) Has obtained a Driver Permit from the Facilities Manager (see 3.4.3 below); and
- h) Has been assessed for any training needs by the immediate Trust Vehicle Manager.

3.6.2. Depending on the type of vehicle driven, special licensing may be required prior to the vehicle use. For example, special licensing is required for driver certification for the operation of twelve seat passenger vans. Trust Vehicle Drivers must consult with their Trust Vehicle Manager to determine eligibility. Further guidance as to the required licensing is contained in the Licence Check Procedure.

3.6.3. Where authorisation has been given, the Trust Vehicle Driver is to obtain a Driver Permit from the Facilities Manager or their delegate. The permit is valid for one year and may be suspended where drivers no longer meet the above requirements and/or are

in serious breach of this policy. A serious breach of this policy will typically be an offence against the road traffic law including, but not limited to:

- Speeding
- Driving under the influence of alcohol or drugs
- Reckless and/or careless driving that leads to substantial property damage or personal injury
- Illegal use of mobile phones, or equivalent devices, whilst driving

3.6.4. Where Trust Vehicle Drivers have 6 or more points endorsed on their licence during the course of their employment within the Trust at any one time, or had more than 2 'at fault' accidents over the last 2 years, the Trust Vehicle Manager must consider whether additional driver training is required and whether the Driver Permit needs to be suspended. Trust Vehicle Managers may consider driver training and/or suspension of the Driver Permit in any other circumstances as deemed appropriate for such action.

3.6.5. When applying or renewing the Driver Permit, the Trust Vehicle Driver must provide evidence of any penalty points regardless of whether they have had any such endorsements. Further guidance on this can be found in the associated Licence Check Procedure.

### 3.7. Principles of licence checking – Trust Vehicles

3.7.1. Trust Vehicle Managers shall check the licences of all authorised Trust Vehicle Drivers working in their department/division at annual intervals at the same time as the Driver Permit is due to be renewed. Where 6 or more points are endorsed on the licence, every 6 months.

3.7.2. All Trust Vehicle Drivers must report any changes to their licence to their Trust Vehicle Manager within 48 hours after the citation was issued. Changes include, but are not limited to, licence revocation, penalty points, restriction or suspension. Where an employee fails to report such change, the Trust Vehicle Manager may consider suspending the Trust Driver Permit and investigating the matter.

3.7.3. Additionally, any Trust Driver who has been issued with, or informed of, either of the following must inform their Trust Vehicle



Manager within 48 hours of being notified. Failure to do so may lead to disciplinary action being taken by the Trust.

- A Summons to appear in court on a driving offence;
- Is being prosecuted for an alleged motoring offence;
- Has been bailed to attend a police station at a later date or charged and bailed to appear in court on a motoring offence;
- Have been charged with a motoring offence;
- Receive a Notice of Intended Prosecution concerning a motoring offence; or
- Issued with a notice of prosecution as the registered keeper of a vehicle involved in a motoring offence.

3.7.4. Further details as to the licence checking requirements can be found in the Licence Check Procedure.

### 3.8. Principles of Vehicle allocation

3.8.1. It is the responsibility of each manager to ensure that their staff use the most efficient and economical means of transport for any business related journey taking into account the cost of travel, cost of subsistence and time savings. More expensive travel means may only be authorised when justified by a management benefit or to meet the needs of employees with disabilities.

3.8.2. Where efficient to do so, public transport must be chosen over the use of a Trust Vehicle. The use of privately owned vehicles will be limited to infrequent and short business trips.

### 3.9. Permitted and prohibited use of Trust Vehicles

3.9.1. Use of a Trust Vehicle must be for business purposes or incidental use only. Incidental use occurs whilst being 'en route' on official business and typically includes trips to shops or restaurants where a Trust employee is away from home overnight.

3.9.2. Whilst driving Trust Vehicles drivers must remember not to bring the Trust into disrepute and shall therefore refrain from stopping at locations the public would perceive as inappropriate.

3.9.3. The use of Trust Vehicles is strictly prohibited in the following circumstances:

- For pure personal gain, for example, to transport passengers or goods for personal purposes;
- Whilst being impaired by alcohol, drugs, illness or fatigue;
- Whilst smoking or using a handheld mobile phone; and/or
- For transporting unauthorised passengers or unauthorised goods.

3.9.4. Trust Vehicle Drivers who knowingly commit a breach of any of the above rules will face investigation which may result in disciplinary action and may be suspended from driving a Trust Vehicle.

3.9.5. Further details of driving and loading requirements are included in the Drivers' Manual.

3.9.6. All Drivers must be aware that the Trust will not reimburse parking fines or speeding fines that occur during business journeys (for further details please refer to the Expenses Policy). The driver responsible for the Trust Vehicle at the time of the offence is responsible for payment within the stipulated period of any penalties, excess charges, or fines that occur when they are using the Trust Vehicle.

3.9.7. Further details on the reimbursement of travel expenses such as mileage claims, hotel fares, etc. can be found in the Expenses Policy on the Trust intranet and also Agenda for Change Handbook.

### 3.10. Accidents

All Drivers must refer to the Trust's Incident Reporting Policy and Procedures, if they have an accident during an Official Business Journey. Where such accident results in personal injury to themselves or a third party, or damage to their vehicle, they must further immediately report this incident to their Line Manager who will decide whether the accident details need to be escalated further. Trust Vehicle Drivers are further asked to follow the accident procedure as set out in the Drivers' Manual.

### 3.11. Insurance

3.11.1. The Deputy Foundation Secretary is responsible for ensuring that the Trust has the appropriate classification and level of

insurance in place for all Trust Vehicles (Trust Fleet Insurance). Trust Vehicle Managers must advise the Deputy Foundation Secretary without delay of any vehicles that must be added to, or removed, from the list. The insurance arrangements are to be approved by the Director of Corporate Affairs.

3.11.2. Trust Vehicle Managers must check whether Trust Vehicle Drivers in possession of a foreign (non-UK/Irish/EU) driving licence will be covered by the Trust Fleet Insurance Policy.

3.11.3. Where Private Vehicles are used for Official Business Journeys, it is the Private Driver's responsibility to ensure that the vehicle in question is covered by a motor insurance policy that includes 'business use' and 'business passengers' (see 3.5.2). Private Drivers must register with Finance Tools to provide assurance to the Trust of appropriate motor insurance cover (see 3.5.3. and 3.5.4). This is irrespective of whether they intend to claim expenses.

### 3.12. Driver training

3.12.1. Trust Vehicle Drivers' training needs are to be assessed by Trust Vehicle Managers before the authority to drive a Trust Vehicle is granted and annually thereafter. Identified training needs are to be communicated to the Facilities Manager who will arrange such training in the most appropriate way with assistance from the Deputy Foundation Secretary.

3.12.2. All Trust Vehicle Drivers for whom training is necessary as part of their role, must undertake a refresher course at 3-yearly intervals, or sooner if necessary.

### 3.13. Vehicle maintenance and servicing

3.13.1. Vehicle maintenance and vehicle servicing are the responsibility of each driver. In particular drivers have to ensure that the vehicle they are driving (whether it is a Trust Vehicle or a Private Vehicle), is in a safe and roadworthy condition; is suitable for the purpose it is used; is taxed, has a valid MOT certificate, is serviced in accordance to the manufacturer's specifications and is safe to use as a place of work. Trust Vehicle Drivers must follow the recommendations set out in the Drivers' Manual.

3.13.2. Trust Vehicle Managers are to monitor the safety, condition, servicing and cleanliness of Trust Vehicles as necessary, but at least at 6 monthly intervals. They must communicate and forward to the Deputy Foundation Secretary any information regarding vehicle defects that could impact on the Trust Fleet Insurance

Policy. Where several Trust Vehicle Drivers share the same vehicle, Trust Vehicle Managers must further monitor the Vehicle Condition Report that is attached to the Drivers' Manual. Any records shall be kept for the time period as specified by the retention schedule for corporate records (see Annex to the Corporate Records Procedure).

3.13.3. All Trust Vehicles will be installed with vehicle trackers.

3.13.4. Where private vehicles are used regularly (i.e. on average twice a week or more), or where the driver is paid the Regular User Rate for Official Business Journeys (Private Vehicles), the Line Manager, or any other person who authorises these journeys (see 3.5), must request, at least annually, a copy of the insurance certificate, and MOT certificate. Where the annual check leads to an unsatisfactory outcome, the use of that Private Vehicle will be prohibited until the vehicle has been serviced and/or been granted a valid MOT.

#### 3.14. Fleet Management

The Deputy Foundation Secretary is required to keep a log book of all Trust Vehicles (Trust Fleet Log Book), setting out the make, model, year and registration number, as well as the name and Driver Permit number of any driver authorised to drive each vehicle. This log book is to be reviewed annually and 2 months prior to any change or renewal of the Trust Fleet Insurance Policy.

## 4. Duties

### 4.1. Board of Directors

The Board of Directors share the responsibility to look after the health and safety of Trust employees. Under the Corporate Manslaughter and Corporate Homicide Act 2008 they can be prosecuted for gross negligence leading to the death of Trust employees or members of the public. Thus, in an incident involving Trust employees driving on company business which results in a fatality, the Board of Directors is required to demonstrate that the correct policies and procedures were in place with regard to vehicle/driver legalities and vehicle maintenance/safety.

### 4.2. Director of Corporate Affairs

The Director of Corporate Affairs will:

4.2.1. Approve the Licence Check Procedure and subsequent amendments thereto;

- 4.2.2. Approve the motor insurance arrangements; and
- 4.2.3. Notify the Board of Directors of any serious offences against this policy.

#### 4.3. **Deputy Foundation Secretary**

The Deputy Foundation Secretary will:

- 4.3.1. Arrange the motor insurance policy for all Trust Vehicles;
- 4.3.2. Monitor any motor insurance claims;
- 4.3.3. Monitor compliance with this Policy and any related procedural documents;
- 4.3.4. Review and, if necessary, revise this policy and any related procedural documents;
- 4.3.5. Keep an up to date Trust Fleet Log Book, to include a record of Trust vehicle servicing and MOT's; and
- 4.3.6. Monitor the safety, condition, servicing and general maintenance of Trust Vehicles on a quarterly basis.

#### 4.4. **Facilities Manager**

The Facilities Manager or his/her delegates will:

- 4.4.1. Issue Trust Driver Permits to all authorised Trust Vehicle Drivers;
- 4.4.2. Check Trust Vehicle Drivers' licence annually for any penalty endorsements;
- 4.4.3. Service and maintain the Trust Vehicle they drive in accordance with the law, the vehicle handbook and the Drivers' Manual;
- 4.4.4. Liaise with Corporate Affairs regarding any drivers who have more than 3 penalty points, but less than 6, to decide whether a discretionary decision needs to be made considering the impact of the service if the Trust Vehicle Driver is not issued a Driver Permit;
- 4.4.5. Arrange driver training as identified by the Trust Vehicle Managers; and
- 4.4.6. Provide advice to other members of staff with regards to the day to day conduct of Trust Vehicles.

#### **4.5. Trust Vehicle Manager**

Each department that has Trust Vehicles shall identify a Trust Vehicle Manager. These Trust Vehicle Managers will:

- 4.5.1. Check the driving licence of the Trust Vehicles Drivers in their department in accordance with the Licence Check Procedure;
- 4.5.2. Authorise Trust Vehicle Drivers to drive particular Trust Vehicles, review and suspend any such authorisation thereafter as set out in this policy;
- 4.5.3. Notify the Deputy Foundation Secretary of any Trust Vehicles and Trust Vehicle Drivers to be listed in the Trust Fleet Log Book and any subsequent changes to such entries;
- 4.5.4. Monitor Trust Vehicle Drivers' and Private Drivers' compliance with this policy and the Drivers' Manual and take action accordingly;
- 4.5.5. Identify Trust Vehicle Drivers' training needs and communicate these to the Facilities Manager;
- 4.5.6. Forward to the Deputy Foundation Secretary any information regarding Trust Vehicles' defects that could impact on the Trust Fleet Insurance Policy;
- 4.5.7. Liaise with the Deputy Foundation Secretary to ensure that any Trust Vehicle Drivers possessing a foreign driving licence are covered under the Trust Fleet Insurance Policy;
- 4.5.8. Monitor the management of any Trust Vehicle Driver related and/or vehicle related records held;
- 4.5.9. Monitor use of the Vehicle Condition Report that is attached to the Drivers' Manual and take action accordingly;
- 4.5.10. Ensure that Private Drivers are registered with Finance Tools; and
- 4.5.11. Check the driving licence of Private Drivers when prompted to do so.

#### **4.6. Line Managers**

Line Managers who authorise a member of staff (Private Driver) to use their Private Vehicle to conduct Trust business will:

- 4.6.1. Ensure the Private Driver holds a valid driving licence;
- 4.6.2. Has a valid insurance certificate which covers business use and/or business passengers; and
- 4.6.3. The Private Driver has registered on Finance Tools.

#### 4.7. **Trust Vehicle Drivers**

Trust Vehicle Drivers will:

- 4.7.1. Hold a valid current driving licence with no more than 3 points endorsed at the time of issue of the Driver Permit;
- 4.7.2. Present such licence to their Trust Vehicle Manager in accordance with this policy (see 3.6) and carry such licence with them at all times unless it has been submitted to the DVLA or the Trust Vehicle Manager for routine checking;
- 4.7.3. Notify their Trust Vehicle Manager within 48 hours of any sanctions imposed on their driving licence (see 3.6.2); restrictions on their ability to drive, vehicle defects or anything else that could impact on the Trust Fleet Insurance Policy;
- 4.7.4. Obtain a Trust Driver Permit from the Facilities Manager prior to any journey undertaken in a Trust Vehicle;
- 4.7.5. Carry an Insurance Certificate copies of which can be obtained from the Deputy Foundation Secretary;
- 4.7.6. Undergo regular eye tests and/or any other medical checks as may be required by the type of vehicle driven;
- 4.7.7. Notify the DVLA and their Trust Vehicle Manager if they feel they might be affected by certain illnesses that could inhibit their ability to drive (A full listing of these conditions can be found in DVLA Form D100 which is available from post offices or downloadable at: [Order DVLA forms - GOV.UK](#));
- 4.7.8. Abide by this policy and all related procedures;
- 4.7.9. Drive in keeping with all road traffic law;
- 4.7.10. Follow the guidance contained in the Drivers' Manual;
- 4.7.11. Use Trust Vehicles for business purposes only, unless private use has been specifically authorised by their Trust Vehicle Manager;

- 4.7.12. Regularly clean the inside and outside of the Trust Vehicle they are driving;
- 4.7.13. Carry out routine vehicle checks as recommended in the Drivers' Manual;
- 4.7.14. Where required, complete the Vehicle Condition Report attached to the Drivers' Manual; and
- 4.7.15. Attend any training sessions identified by their Trust Vehicle Manager.

#### **4.8. Private Vehicle Driver**

Private Vehicle Drivers are responsible for:

- 4.8.1. Ensuring that their vehicle is in a safe and roadworthy condition; is suitable for the purpose it is used; is taxed, has a valid MOT certificate and is serviced in accordance to the manufacturer's specifications;
- 4.8.2. Obtaining insurance cover for 'business use' and/or 'business passengers';
- 4.8.3. Holding a valid and current driving licence; and
- 4.8.4. Registering with Finance Tools.

### **5. Implementation and Monitoring**

#### **5.1. Implementation**

5.1.1. The Director of Corporate Affairs and Deputy Foundation Secretary will provide advice and support about the implementation of this Policy.

5.1.2. Line Managers are to report to the Deputy Foundation Secretary any serious breaches of this Policy (see 4.3.3).

#### **5.2. Monitoring**

Appendix A details how this Policy will be monitored.

### **6. References**

Agenda for Change Handbook

Corporate Manslaughter and Corporate Homicide Act 2008



European Working Time Directive

Health & Safety at Work Act 1974

Health and Safety (Offences) Act 2008

Highway Code

Management of Health & Safety Regulations 1992 (updated 1999)

Provision & Use of Work Equipment Regulations (PUWER) 1998

Road Safety Act 2006

Road Traffic Act 1988

## **7. Associated Policy and Procedural Documentation**

Corporate Records Procedure

Drivers' Manual (including the accident management procedure for vehicles held by the Trust under Automotive leasing)

Expenses Policy

Expenses Procedure

Incident Reporting Policy and Procedures

Information Lifecycle and Records Management Policy

Licence Check Procedure

Claiming Care Travel Expenses:

<http://uhbhome/Downloads/pdf/FinanceSystemsClaimingExpensesCar.pdf>

Claiming expenses User Guide:

<http://uhbhome/Downloads/pdf/FinanceSystemsClaimingExpensesUserGuide.pdf>

Electronic expenses registration data capture form:

<http://uhbhome/Downloads/pdf/FinanceSystemsElectronicExpensesForm.pdf>

## Appendix A

## Monitoring Matrix

| <b>MONITORING OF IMPLEMENTATION</b>            | <b>MONITORING LEAD</b>      | <b>REPORTED TO PERSON/GROUP</b>                | <b>MONITORING PROCESS</b> | <b>MONITORING FREQUENCY</b> |
|--|-----------------------------|--|---------------------------|-----------------------------|
| Details of serious breaches of this Policy     | Deputy Foundation Secretary | Director of Corporate Affairs Governance Group | Exception report          | As and when required        |
| Details of any insurance and litigation claims | Deputy Foundation Secretary | Board of Directors                             | Report                    | Bi-annually                 |
| Safety and cleanliness of Trust Vehicles       | Line Manager                | Deputy Foundation Secretary                    | Spot checks carried out   | As and When required        |