

# EMPLOYEE HANDBOOK 2025

**CSRM**

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Registered in England and Wales. Company No: 6421376.  
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# Employee Handbook

Section 1 .....	3
Welcome to our team.....	3
About CSRM.....	4
Equal Opportunity Statement.....	5
Section 2 .....	6
Joining CSRM.....	6
Safeguards .....	8
Standards in the workplace .....	11
Section 3 .....	14
<b>Policies and Procedures .....</b>	<b>14</b>
Recognition and Reward Policy .....	14
Annual Leave and Pay Policy.....	17
Absence and Sickness Policy .....	20
Other Time Off.....	23
Carers Leave.....	24
Overtime Policy.....	25
Flexible Working Policy.....	27
Capability Policy and Procedure .....	31
Appraisal Process.....	39
Internet and E-mail Policy.....	41
Equality and Diversity Policy .....	45
Sexual Harassment Policy .....	46
Grievance Procedure .....	52
Disciplinary Procedure .....	54
Dismissal for Some Other Substantial Reason (SOSR) Procedure .....	59
Dignity at Work Policy.....	61
Personal Relationships at Work Policy.....	63
Whistle-blowing Policy .....	65
Clear Desk and Workspace Policy .....	66
Anti – Bribery Policy.....	67
Adverse Weather Policy.....	69
Privacy Policy .....	70

# Employee Handbook

Health and Safety.....	74
Working Time Directive Policy .....	77
Alcohol, Drugs and Smoking Policy .....	79
Mobile Phone Policy .....	81
Work Cancellation Policy .....	83
Home Working Policy.....	84
Flexible Operating Policy .....	85
Section 4 .....	87
Parental Leave Policy .....	87
Maternity/Paternity/Leave and Pay .....	89
Adoption Leave.....	99
Shared Parental Leave .....	103
Neonatal Care (Leave and Pay) .....	106
Section 5 .....	108
Employee Benefits .....	108
D4 Medical Examination .....	108
Specsavers Eyecare Scheme .....	108
NEST Pension .....	109
Expenses and Mileage Claims .....	109
Section 6 .....	111
Leaving CSRM.....	111
Receipt and Acceptance – Employee Handbook .....	113
Appendix 1 - Working Time Regulations 1998 – OPT OUT FORM.....	114
Appendix 2 - Training agreement .....	115



# Employee Handbook

## Section 1

### Welcome to our team

Whether you recently joined us or are an existing employee, our aim is to support you through a successful career with CSRm.

We are a dedicated service provider meeting the requirements of a long-term contract with Jaguar Land Rover, (referred to as the customer). This is a client supplier relationship that started 25 years ago as a solution to my own services as a contract Instructor.

You are part of a company that are committed to delivering: -

#### **World-class Instructors, who:**

- Deliver experiences in the world's most capable vehicles.
- Provide expert guidance in a variety of environments.
- Share unrivalled product knowledge and passion for the brand and a customer first approach.

#### **Tour Hosts, who:**

- Deliver manufacturing tours that showcase state of the art facilities.
- Share passion and expert knowledge on the vehicle build process, location, brand history and product specifics.
- Operate within the constraints of a busy and controlled environment with customer first at the forefront.

#### **Specialist Support Staff: Event: Fleet: Reception: Marketing; Host and project personnel, who:**

Coordinate varied and often complex events and projects that deliver exceptional guest satisfaction throughout.

Our team efforts ensure the success of Jaguar Land Rover Experience. We value all our employees greatly and we are here to ensure that your experience of working with CSRm is positive and rewarding.

**Steve Vaughan**

Managing Director



# Employee Handbook

## About CSRm

CSRm is a preferred supplier to Jaguar Land Rover and the wholly owned Jaguar Land Rover Experience operations.

The Company operates from a base in Warwickshire but our Human Resource Manager visits each of the JLRE centres. This enables excellent communications with Jaguar Land Rover management and most importantly, with our employees.

All employees, whether full or part time, enjoy a number of benefits including JLR comparable pay, paid holiday, statutory sick pay, parental pay, automatic enrolment to a pension scheme and paid travel to centres other than their normal place of work.

CSRm operates to a great extent like a HR department of a large company. The centre managers look after the day-to-day work allocation and daily needs of staff. CSRm looks after staff welfare, training, performance management, discipline and ensures staff are paid correctly and paid on time. No-one is simply a number with CSRm. We have a good record of taking care of staff and consequentially, our staff turnover rate is very low. Over 35 of our employees have worked with us for five years or more and half of them have worked with us for more than ten years.

The relationship between JLR and CSRm is well integrated and longstanding.

CSRm believe in developing and empowering our employees to succeed. We want you to enjoy coming to work and aim to provide a positive, professional environment where you have the support to grow. We act with integrity and seek to be as open and inclusive as possible ensuring we retain the ethos of our business as we continue to grow.

This Employee Handbook is designed both to introduce you to our company and to be of continuing use during your employment.

We ask that you carefully study the contents of this Employee Handbook as, in addition to setting our rules and regulations, it also contains information on some of the main employee benefits and the policies and procedures relating to your employment. If you require any clarification or additional information, please ask your HR Manager.

We all know that nothing stays still; we need to embrace and respond to changes as they arise. For this reason, general amendments to the Employee Handbook will be made from time to time.

# Employee Handbook

## Equal Opportunity Statement

At CSRM we are committed to the principle of equal opportunity in employment. Accordingly, we will ensure that recruitment, selection, training, development, promotion procedures and redundancy consideration result in no one receiving less favourable treatment on the grounds of age, disability, gender reassignment, marriage or civil partnership, pregnancy and maternity, race, religion or belief, sex, sexual orientation or being a part time worker.

The objective is to ensure that individuals are recruited, promoted and otherwise treated, solely on the basis of their relevant aptitudes, skills and abilities.

Management has the primary responsibility for successfully meeting these objectives by:

- Not discriminating unlawfully in the course of employment against employees or job applicants;
- Not inducing or attempting to induce others to practice unlawful discrimination;
- Bringing to the attention of employees that they will be subject to disciplinary action for unlawful discrimination of any kind.

As a member of the team, you have the responsibility of ensuring that you assist CSRM in successfully achieving these objectives by:

- Not discriminating unlawfully in the course of employment against fellow employees, customers, suppliers or members of the public with whom you come into contact during the course of your duties;
- Not inducing or attempting to induce others to practise unlawful discrimination; reporting any unlawful discriminatory action to your HR Manager.

# Employee Handbook

## Section 2

### Joining CSRm

#### **Probationary Period**

If you are a new member of the team, you will join us on an initial probationary period of six months, as detailed in your Statement of Terms and Conditions of Employment. During this period your work performance and general suitability will be assessed and, if it is satisfactory, your employment will continue. However, if your work performance is not up to the required standard, or you are considered to be generally unsuitable, we may either take remedial action (which may include the extension of your probationary period) or terminate your employment at any time. We reserve the right not to apply our full contractual capability and disciplinary procedures during your probationary period.

#### **Job Description**

Job descriptions have been developed for all roles. Amendments may be made to your job description from time to time in relation to changing business needs and your own ability.

#### **Job Flexibility**

It is a condition of employment that you are prepared, whenever necessary, to transfer to alternative departments or duties within the business. This may include a limited time working overseas, if required to support events or training. During holiday periods, etc. it may be necessary for you to take over some duties normally performed by colleagues. All staff are required to be flexible in their working days to meet the needs of JLRE business, you must be available to work weekends, as required. This flexibility is essential for operational efficiency as the type and volume of work is always subject to change.

#### **Mobility**

Although you are usually employed at one particular location, it is an express condition of your employment that you are prepared, whenever applicable, to transfer to any other of our customers premises/future locations on a temporary or permanent basis. This mobility is essential to the smooth running of the business.

#### **Training**

The company has a policy of encouraging its employees to undertake training in order to further their career within the company. Any training specific to JLRE requirements i.e., Instructor or Tour Host training will be paid for by JLRE and you will be required to complete and pass any necessary assessments required for the role. All external training, none specific to JLRE will be paid for by CSRm. All training requirements must be agreed during your performance review and will form part of your training plan. It is the employees' responsibility to consider their training needs and to remain up to date with all mandatory e-learning available to them and complete any online courses sent via JLRE/CSRm.

The company may require you to complete a Training Agreement for certain courses, in the event of termination of employment, for whatever reason, the company would then seek reimbursement of the costs in line with the Training Agreement, found in appendix 2 of this document.

# Employee Handbook

## Payment

All employees are paid monthly in arrears on the last day of the month. Salaries are paid as detailed in your individual Statement of Main Terms of Employment.

You will receive a payslip showing how the total amount of your pay has been calculated. It will also show the deductions that have been made and the reasons for them, e.g., Income Tax, National Insurance, etc. Please ensure that the information on our customers resource tool reflects any holiday or sickness days and the number of days you have worked, as a report is provided to our payroll department. A reminder of your responsibility to check the tool is provided by our payroll department each month. Any pay queries that you may have should be raised immediately with our payroll department, as all discrepancies are reported to our customer.

If you are overpaid for any reason, you would be required to inform the payroll department immediately, the total amount of the overpayment will be deducted from your next payment.

At the end of each tax year, you will be given a form P60 showing the total pay you have received from us during that year and the amount of deductions for Income Tax and National Insurance. You should this document in a safe place as you may need to produce them for tax purposes.

## Other Employment

You are expected to devote the whole of your time and attention during working hours to the business. If you propose taking up employment with another employer or pursuing separate business interests or any similar venture, you must discuss the proposal with the Company, in order to establish the likely impact of these activities on both yourself, CSRM and our Customer (JLRE). You will be asked to give full details of the proposal and consideration will be given to:

- Working hours
- Competition, reputation and credibility
- Conflict of Interest
- Health, safety and welfare

Full-time contracted staff must have consent from the Company. - If you work without consent this could result in the termination of your employment.

If you are unhappy with the decision, you may appeal using the Grievance procedure contained in this handbook

## Changes in Personal Details

You must notify us of any change of name, address, telephone number, bank details, etc., so that we can maintain accurate information on our records and make contact with you in an emergency, if necessary, outside normal working hours.

## Travel Expenses

We will reimburse you for any travel expenses incurred whilst travelling to venues other than your normal place of work. Receipts must be submitted for any expenditure submitted on an expense claim form. The rules relating to expenses are aligned with JLR Expenses Policy. Mileage claims are detailed in the employee benefits section of the handbook.



# Employee Handbook

## **Driving Licence**

If it is a requirement of your job duties that you possess a current UK driving licence, or equivalent, the loss of such a licence as a result of a motoring conviction or on health grounds, may, if we are unable to provide suitable alternative employment, lead to the termination of your employment. You are required, to consent to regular driving licence checks through a third-party company on behalf of CSRM and wherever requested, to produce your driving licence for our inspection at any time when so requested and must inform the Company immediately of any prosecutions including minor driving offences such as speeding.

## **Medical Declaration**

It is a requirement for you to notify the Company of any issues regarding your health and wellbeing to allow the business to make any reasonable adjustments required to your working environment.

## **Parking**

Where parking facilities have been made available to you at our customers premises you must ensure that you observe all of the traffic requirements e.g., speed limits, etc. To avoid congestion, all vehicles must be parked only in the designated parking areas. No liability is accepted for damage to private vehicles; however, it may be caused.

## **Safeguards**

### **Right of Search**

Although we do not have the contractual right to carry out searches of employees and their property (including vehicles) whilst they are on our customers premises, we would ask all employees to assist us in this matter should our Customers Business Protection Unit feel that such a search is necessary.

## **CCTV**

Closed circuit television cameras are used on our customers premises for security purposes. We reserve the right to use any evidence obtained in this manner in any disciplinary issue.

## **Monitoring Radio Communications**

Where radios are used in role delivery i.e., Instructors/Tour Hosts, Managers or their authorised representative may from time-to-time intercept radio communications within JLRE.

The purpose of this intervention will be:

- to ensure compliance with regulatory or self-regulatory practices relevant to JLR's business and JLR's standard operating procedures;
- to keep a record of instructions given before and during activities at the venues;

# Employee Handbook

- for quality control to ensure that individuals are demonstrating standards that are or ought to be achieved by persons using the systems; and
- for staff training purposes.

This interception is solely for the purposes set out above.

## Data Protection

When you join CSRM you acknowledge and agree that as your employer, the Company needs to keep and process information about you for normal employment purposes. The information we hold and process will be used for our management and administrative use only, some information will be shared with our customer for the purpose of your employment whilst working within JLRE. We will keep and use it to enable us to run the business and manage our relationship with you effectively, lawfully and appropriately, during the recruitment process, whilst you are working for us, at the time when your employment ends and after you have left.

This includes using information to enable us to comply with the employment contract, to comply with any legal requirements, pursue the legitimate interests of the Company and protect our legal position in the event of legal proceedings.

Under the General Data Protection Regulation (GDPR) and The Data Protection Act 2018 (DPA) you have a number of rights with regard to your personal data. You have the right to request from us, access to and rectification or erasure of, your personal data, the right to restrict processing or object to processing as well as in certain circumstances the right to data portability.

It is a condition of your employment that you provide CSRM with current and accurate contact information, including your home phone number and address and the home phone number and address of the person you would wish to have notified in the event of an accident, illness or other emergency affecting you whilst at work.

If your employment with CSRM is discontinued for any reason then we will destroy all personal records and data held about you, other than the data we are required to keep by law, six months after your last day worked as outlined on your P45.

You must comply with the following guidelines at all times in relation to the Data Protection Act:

- Do not give out confidential information except to the data subject. In particular, it should not be given to someone from the same family or to any other unauthorised third party unless the data subject has given their explicit written consent to this.
- Be aware that those seeking information sometimes use deception in order to gain access to it. Always verify the identity of the data subject and the legitimacy of the request, particularly before releasing personal information by telephone.
- Only transmit personal information between locations by fax or e-mail if a secure network is in place, for example, a confidential fax machine or encryption is used for e-mail.
- If you receive a request for personal information about another employee, you should forward this to the HR Manager who will be responsible for dealing with such requests.
- Ensure any personal data you hold is kept securely, either in a locked filing cabinet or, if computerised, it is password protected.

Failure to comply with these rules may amount to gross misconduct.



# Employee Handbook

## **Confidentiality**

A Certificate of Confidentiality form will be required to be signed on starting your employment.

You are to exercise reasonable care to keep safe all documentary or other material containing confidential information, and shall at the time of termination of your employment with us, or at any other time upon demand, return to us any such material in your possession.

## **Property and Copyright**

All written material, whether held on paper or electronically which was made or acquired by you during the course of your employment with CSRM, is to remain within our customers premises.

Use of such property for any purpose other than normally defined duties is not permitted. Property of any type is not to be taken away from the premises unless with prior approval. You must immediately notify your manager of any damage to property or premises.

We do not accept liability for any loss of, or damage to, property that you bring onto the Customer premises. You are requested not to bring personal items of value and, in particular, not to leave any items overnight. Articles of lost property should be handed to your manager who will retain them whilst attempts are made to discover the owner.

## **JLRE Company Fleet Vehicles**

If your role requires you to drive any of the JLRE Fleet Vehicles, you will be required to complete a Class 2 On Road Driving Assessment, a qualified driving Instructor will assess your driving ability. Instructors complete a comprehensive driving assessment, which includes a Class 2 On Road Assessment.

It is the responsibility, when driving any of our customers vehicle that you take due care and attention at all times, adhering to the JLR Fleet Operations Policy and the law and regulations at all times. Any accident/near miss in a vehicle will be fully investigated by the Compliance Manager and the appropriate reporting paperwork should be completed. Any excessive and regular vehicle damage could result in being removed from our customers insurance policy, therefore, resulting in you being unable to drive a fleet vehicle.

# Employee Handbook

## Standards in the workplace

### **Behaviour at Work**

You should refer to the JLR Code of Conduct and Creators Code issued to you during your Company Induction.

Always behave with civility towards fellow employees. No rudeness will be permitted towards customers or members of the public. Objectionable or insulting behaviour or bad language will render you liable to disciplinary action.

You should use your best endeavours to promote the interests of the business and shall, during normal working hours, devote the whole of your time, attention and abilities to the business and its affairs.

Any involvement in activities which could be construed as being in competition with CSRM/JLRE is not allowed.

### **Discussion of wages**

At CSRM all employees depending on their job description and responsibilities are within a pay band from 1 to 5. Salaries within these pay bands vary due to length of service or outstanding performance percentage increases, therefore we would discourage discussions between employees about their wages as these will not always be comparable.

### **Conduct on Company Business**

Employees must always conduct themselves appropriately both at work and at out-of-hours work-related events such as office parties, work-related social gatherings, social gatherings/functions organised by our customer or other suppliers, work-related conferences, shows, events and when working away on business on behalf of the company.

On these occasions, employees are expected to be moderate if drinking alcohol and to behave in an appropriate, mature and responsible manner, taking into account that they are representing the company.

We will investigate allegations of inappropriate conduct and follow the formal disciplinary procedure which in extreme cases could lead to dismissal.

### **Lateness/Absenteeism**

You must attend work punctually at the specified time(s) and you are required to comply strictly with any time recording procedures relating to your work. Should an employee be late, without having obtained prior permission from their immediate supervisor, they will be counselled by their immediate supervisor as to the reason for lateness, and advised of the consequences of further lateness.

Persistent lateness may result in disciplinary action. If your lateness gives rise to concern your manager will raise the issue to CSRM HR to address the issue.

Occurrences of lateness will be dealt with as follows;

- 5 instances of lateness during a 52 week period – Recorded verbal warning
- 3 instances of lateness during the following 4 week period – Written warning
- 3 instances of lateness during the following 13 week period – Second written warning

# Employee Handbook

- 3 instances of lateness during the following 26 weeks period – Unpaid suspension (5 days) final written warning

All absences must be notified in accordance with the sickness reporting procedures laid down in this Employee Handbook.

## Personal Mobile Phones

CSRM expects that the use of personal mobile telephones would only occur during normal break periods. You must ensure that your personal mobile phone is switched to silent at all times during working hours and that your mobile phone does not interfere with your work.

If you are required to use your personal mobile whilst at work this is at the discretion of the JLR Manager.

It is illegal to use a mobile phone without a hands-free set whilst driving. It is our policy that you should not use any mobile phone whilst driving. You should pull over to the side of the road in an appropriate place before making or receiving any telephone calls. In the event of being unable to pick up a call because you cannot find a safe place to park, you must return the call as soon as conveniently possible.

## Gifts

In order to maintain the integrity of both yourself and the company, any gifts, benefits or invitations to subsidised events etc. must be disclosed to your manager. You should not accept any high value gifts or invitations without prior authorisation. Please refer to the JLR Code of Conduct for any further information.

## Operational Efficiency

We are aligned with JLR policy of "Operational Efficiency" which is essential to the cost-effective and efficient running of our customers business.

You are able to promote this policy by taking extra care during your normal duties by avoiding unnecessary or extravagant use of services, time, energy, etc.

The following points are illustrations of this: -

- handle machines, equipment and stock with care;
- turn off any unnecessary lighting and heating.
- Keep doors closed whenever possible;
- ask for other work if your job has come to a standstill; and
- start with the minimum of delay after arriving for work and after breaks.

Any loss that is the result of your failure to observe rules, procedures or instruction, or is as a result of your negligent behaviour or your unsatisfactory standards of work may result in disciplinary action being taken.

## Dress Code

It is important that you present a professional image with regard to appearance and standards of dress.

# Employee Handbook

- You should wear clothes appropriate to your job responsibilities and they should be kept clean and tidy at all times i.e., support staff - smart professional business attire. It is very important that you should maintain high standards of personal hygiene.
- Where uniform is provided, it should be worn at all times whilst at work and laundered on a regular basis.
- Facial piercing, (except ear piercing) and tongue studs should be removed whilst on duty.
- Visible tattoos should be covered and hair should be neat, tidy and well groomed.

Management reserves the right to require employees who are inappropriately dressed to change their clothing.

## **House Keeping**

Our customer follows the 5S Standards; Sort, Set in Order, Shine, Standardise and Sustain, to ensure all work areas, both customer and non- customer facing, are kept clean and tidy at all times.

Please ensure you understand and work with the 5S Standards.

# Employee Handbook

## Section 3

### Policies and Procedures

#### Recognition and Reward Policy

##### Purpose

To promote a culture of appreciation and acknowledgment within our organisation by recognising colleagues who demonstrate the *JLR Creators' Code* behaviors. These behaviours reflect our common responsibilities to one another, our customers, and society: **Customer Love, Unity, Integrity, Growth, and Impact**. This policy also establishes clear financial guidelines and differentiates between verbal acknowledgments and monetary rewards.

##### Scope

Applies to all employees, covering trivial benefits, non-cash incentives and other forms of recognition.

##### Principles

Rewards should not be contractual or linked directly to performance-based compensation.

Recognition should enhance employee engagement while maintaining tax efficiency.

All benefits provided must comply with HMRC's Trivial Benefits exemption and other relevant tax guidelines.

#### Recognition Types and Guidelines

1. **Verbal Recognition:**
  - Used for immediate, informal acknowledgment of a colleague's efforts.
  - Delivered through an email, team meeting shout-out, or similar expressions of appreciation.
  - No financial cost involved.
2. **Non-Financial Recognition:**
  - Includes certificates of appreciation via 'Peer to Peer' thank you' via the 'Wider Rewards' Platform or formal letters, or awards during events.
  - Minimal cost, covered by the recognising party.
3. **Financial Recognition:**
  - Reserved for **exceptional contributions** or achievements that go beyond standard expectations.
  - Examples:
    - Gift cards or vouchers.
  - Costs to be managed are as follows:
    - JLR-to-CSRM recognitions: Handled by CSRM via expenses invoiced back to JLR.
    - CSRM-to-CSRM recognitions: Handled by CSRM awarded from the recognition budget set aside per annum.

#### Recognition Process

##### Peer to Peer recognition

Employees and Managers can recognise their colleagues' achievements by following these simple steps:

1. Navigate to Wider Rewards using the URL [www.widerrewards.com](http://www.widerrewards.com) and enter the unique access code WR68384R provided by CSRM.
2. Select the Wider Rewards 'Peer to Peer' option.
3. Input the details about yourself, the colleague you want to thank and select a design for the e-card you wish to send.
  - Outline the colleague's great work and how their behaviour contributed to the achieved outcome.
4. Preview the message before sending the e-card.
5. Press send; the recognition will be shared with the colleague to celebrate their accomplishment.

# Employee Handbook

## Evaluation and Future Enhancements

To ensure this recognition scheme remains effective, we will monitor the number of recognitions on a monthly basis.

## What Does Good Recognition Look Like?

Here are some examples to inspire your messages of appreciation:

### Customer Love

- *"Thank you for sharing the latest customer insights during our team meeting. You brought the data to life, helping the team understand its real-world impact."*
- *"You identified a vehicle fault and ensured it was resolved, demonstrating pride in our products and commitment to customer satisfaction."*

### Unity

- *"Your assistance in sharing product knowledge allowed the team to deliver an outstanding experience. Your efforts made a real difference!"*
- *"Thank you for supporting the Creators Event. The entire team built strong relationships and had fun in the process."*

### Integrity

- *"Your empathy and understanding during a challenging time have been truly appreciated—thank you."*
- *"You listened to the team's feedback and made them feel heard, which they valued immensely."*

### Growth

- *"Fantastic job running the training course! Everyone found it valuable and enjoyed the session. Great work!"*
- *"Thank you for connecting me with Mr. Smith. His insights will assist us in shaping our future strategies."*

### Impact

- *"Thank you for your valuable contributions during the last session. You prioritised brilliantly, communicated effectively, and delivered what was needed."*
- *"Great work organising last week's event. Your ideas, collaboration, and perseverance ensured its success."*

Recognition is a powerful tool for offering instant, informal feedback and appreciation. It not only boosts morale but also encourages a collaborative and motivated work environment.

## Manager Reward Recognition

### Purpose

To celebrate and reward employees for **exceptional contributions** demonstrating *JLR Creators' Code* behaviours—Customer Love, Unity, Integrity, Growth, and Impact—through structured and transparent recognition and reward processes.

Trivial Benefits (Tax-Free) Eligible benefits must:

- Not exceed £50 per instance.
- Not be cash or a cash voucher.
- Not be part of an employee's contractual entitlement or salary sacrifice scheme.
- Be given outside of work performance expectations.

### Examples:

- Gift cards for retail stores (*excluding cash-equivalent vouchers*)
- Small token gifts (e.g., chocolates, flowers, company merchandise).
- Tickets for non-work-related entertainment.



# Employee Handbook

## Reward Recognition Process

Managers can reward members of their team using the following steps:

### 1. Submit Recognition:

- Email: Experience Business Finance Manager Natalie Edmonds [nedmond1@jaguarlandrover.com](mailto:nedmond1@jaguarlandrover.com). For authorisation of the amount, you would like to reward from £10 to £50.
- Email the authorisation along with the reward recognition to [HR@csrm.co.uk](mailto:HR@csrm.co.uk)
- Subject line format: Reward Recognition – [Name of Person] – [Creators' Code Behaviour]
- Include a brief description of the colleague's exceptional contribution and how it aligns with the behaviours.
- Detail the amount of the e-voucher from £10 to £50, please note that due to HMRC constraints we can only award £50 per annum per person being a 'trivial benefit', which is not cash or related to work or performance.
- HR will navigate to Wider Rewards using the URL [www.widerrewards.com](http://www.widerrewards.com) and enter the unique access code provided.
- Selecting the 'Reward Now' option.
- Inputting the details received from the email and selecting a design for the e-card.
- Previewing the message before sending the e-card.

### 2. Notification:

- HR will confirm receipt of the reward email back to the Manager.
- An instant email from Wider Rewards will be sent to the team member stating their reward will arrive via email separately.
- An email will be sent to the team member containing their reward code and redemption instructions to spend their reward via the retailer's website of their choice.

### 3. Financial Accountability:

- For JLR recognitions directed at CSRM employees: Costs will be covered by JLR, via our expenses process, invoiced directly to JLR.
- For CSRM recognitions within the CSRM team: Costs will be covered by CSRM up to £50 per person maximum per annum.

## What Qualifies for Financial Recognition?

Financial recognition is awarded when employees demonstrate outstanding behaviours that reinforce the JLR Creators' Code values—Customer Love, Unity, Integrity, Growth, and Impact. This applies to actions that strengthen workplace culture, foster collaboration, and elevate organisational standards beyond routine expectations.

Here are some examples; -

### Customer Love:

- *Demonstrating proactive empathy—actively listening to a customer's concerns and ensuring they feel valued in a challenging situation.*
- *Taking ownership of a customer request—going beyond standard interactions to ensure the customer has the best possible experience.*

### Unity:

- *Encouraging collaboration—bringing teams together by fostering open communication and ensuring everyone's contributions are acknowledged.*
- *Creating an inclusive environment—taking intentional steps to ensure diverse perspectives are valued and integrated into decision-making.*

### Integrity:

C:\Users\Jackie Hensher\CSRM Dropbox\Jackie Hensher\Jackie Private File\HR Policies and Procedures\Employee Handbook\CSRM Employee Handbook 2025 V1.docx

# Employee Handbook

- *Acting with honesty and transparency—raising concerns when a process or decision needs ethical consideration, even in difficult situations.*
- *Demonstrating consistency and accountability—staying true to commitments and ensuring colleagues can rely on their actions.*

## **Growth:**

- *Encouraging knowledge-sharing—voluntarily guiding or mentoring a colleague to help them develop skills or confidence.*
- *Embracing learning and adaptability—actively seeking ways to improve processes and sharing those insights with the team.*

## **Impact:**

- *Advocating for positive change—driving an improvement that enhances team morale or organisational effectiveness.*
- *Bringing energy and purpose to work—motivating others with enthusiasm, resilience, and a commitment to shared success.*

## **Key Considerations for Financial Recognition:**

- Must represent a distinct, measurable achievement beyond standard expectations.
- Should contribute to organisational goals, efficiency, or morale in a meaningful way.
- Monetary rewards are subject to compliance with HMRC constraints, ensuring fair and sustainable implementation.

## **Budget Monitoring**

- A designated budget for recognitions will be allocated annually, with periodic reviews to ensure responsible usage.
- Financial recognitions must align with the allocated budget to maintain fairness and sustainability.
- All recognitions, verbal and financial, will be tracked for evaluation and reporting purposes.

## **Evaluation and Development**

To continuously enhance the recognition scheme:

- Feedback from employees will be sought regularly.
- The number and quality of recognitions will be monitored to identify trends.

If you have any questions about the Recognition and Reward process, please contact **HR** at [HR@csrm.co.uk](mailto:HR@csrm.co.uk).

## [Annual Leave and Pay Policy](#)

### **Aim of this Policy**

Annual leave is an important part of work-life balance and therefore CSRM will seek to ensure employees are able to take the paid leave to which they are entitled.

JLRE (the customer) is responsible for planning and approving holiday requests to ensure the needs of their business are met. CSRM Payroll department monitors the number of holidays and pay for all employees.

### **Purpose**

The purpose of the Annual Leave and Pay Policy is to provide a set of guidelines for the application and approval of annual leave requests. It also sets out the responsibilities of our customer and CSRM.

# Employee Handbook

All CSRM employees must give adequate notice and cooperate with our customer procedures for booking leave. This will ensure the service CSRM provide to our customer is maintained.

## Annual Leave Year

The holiday year runs from 1<sup>st</sup> April to 31<sup>st</sup> March the following year.

During each full holiday year of service your holiday entitlement with pay is 34 days per annum, (including Public Holidays), pro-rata for all zero-hour contracts e.g., if you work 50% of the available working year then you will qualify for 50% of the holiday entitlement.

Holiday dates will be by approval with our customer and at least three weeks' notice must be given in respect of holiday of more than two days duration. The Company cannot accept half day holidays.

Holiday days need to be accrued before granted in the first year of employment.

Upon termination of your employment, you will be paid for holiday accrued pro-rata but not taken in that year or requested to take your leave as part of your notice period. Any over-claimed holiday will be reclaimed from your pay.

## General Principles

CSRM Payroll Department will keep a record of remaining annual leave entitlements for all employees. This will match all details input by employees on their resource planner and will be communicated as 'holiday taken to date' and 'remaining holiday to date.'

This information will be accurate up to the end date of the last processed pay run. Staff will need to ensure accurate input on the resource tool to allow holiday records to be correct. Any overpayments in salary as a result of an employee not checking their timesheet on the resource tool could result in dismissal due to gross misconduct.

Employees will be requested to take annual leave when the customer venues are closed i.e., over the Christmas Period, for Bank Holidays or during shutdowns. Communication of the statutory and annual holidays required for each venue will be cascaded to all employees ahead of the holiday year, this may be subject to change i.e., if JLR announce additional shutdowns.

Annual leave from a future leave year cannot be brought forward to a current leave year. E.g., if an employee uses their entitlement, they cannot access next years' entitlement before the start of the next leave year. Exceptional circumstances may be considered after consultation with the relevant manager.

## Roles and Responsibilities

### The Customer is responsible for:

- Planning annual leave to ensure that individuals take their entitlement in a planned way and that in doing so, the business needs are not compromised
- Creating local procedures for requesting and taking annual leave
- Ensuring resources are in place to support the business and appropriate cover has been arranged where necessary, once leave has been approved
- Keeping a record of their staff's holiday dates

# Employee Handbook

## **Employees are responsible for:**

- Ensuring that their annual leave is planned throughout the year in co-ordination with their team and with the agreement of the customer
- Requesting annual leave in a timely manner
- Recognising and accepting that leave may not be granted if insufficient notice is given or if there would be a detrimental impact on the business
- Checking their resource tool for confirmation of the authorised holiday days

## **CSRM is responsible for:**

- Maintaining records of annual leave and entitlement for individuals
- Paying holiday pay
- Advising employees of the amount of holiday taken and remaining to date
- Advising the customer and employee on complex leave queries

Applications to take paid annual leave must be approved by the customer before it is taken. If it is not, the leave will be classified as unauthorised absence and may lead to disciplinary action.

Applications to take paid annual leave should be made by email to record annual leave requests and approvals and requested on the resource tool, once authorised the resource tool will be updated.

Employees should not commit to holiday plans (e.g., book or pay for flights) until requests to take annual leave have been applied for and approved by the customer. This is because the customer still has the right to refuse the request if the leave will impact negatively on the business.

## **Annual Leave Entitlement on Changing Contracted Hours**

When employees change their contracted hours, this will result in a re-calculation of their annual leave entitlement.

## **Accrual of Annual Leave**

Contractual annual leave will continue to accrue during:

- any period of maternity, paternity or adoption leave
- any period of sick leave

Annual leave will not accrue during:

- an Employment/Career Break
- Any periods of unpaid leave other than statutory unpaid leave i.e. Bereavement
- a period of unpaid suspension

## **Carry Over of Annual Leave**

# Employee Handbook

Employees need to ensure they take their full annual leave entitlement within the leave year for rest and refreshment, as this could be a health and safety risk if they do not. However, a maximum of eight days may be carried over to the following holiday year but only in exceptional circumstances and on prior approval with the customer.

Staff who have accrued annual leave whilst on long-term sick leave and will not be returning to work before the end of the leave year, can make a written request to CSRM at least one month before the end of the leave year, to carry over all untaken statutory leave to the new leave year.

Staff who have accrued annual leave while on long-term sick leave but will be returning to work before the end of the leave year, will be entitled to carry over a maximum of 20 days leave.

Annual leave accrued prior to or during maternity/adoption leave up until the end of the leave year should be taken before you commence your maternity leave dependent on the needs of the business or prior agreement to carry the leave over to the next leave year must be obtained.

## **Zero Hour employees**

Annual leave for zero-hour staff is based on full time provisions but are pro-rata according to the number of working days.

All zero hours holiday pay is processed using the rolled-up holiday pay method.

Rolled-up holiday pay allows employers to include an additional amount with every payslip to cover a worker's holiday pay, as opposed to paying holiday pay when a worker takes annual leave.

The holiday pay will be paid at the same time as the worker is paid for the work done in each pay period. Rolled-up holiday pay is to be paid in addition to the worker's normal salary.

At the end of each pay period, you will be paid all holiday accrued in that period.

For example, if you worked 10 days in 1<sup>st</sup> March to 31<sup>st</sup> March, this would accrue 1.5044 days holiday, which would be processed and paid, received in your end of April pay slip.

Annual leave does not need to be added to your Resource profile. You will still need to allocate any unavailable days, to ensure the venues do not book you whilst you are away / not available.

## **Unpaid Leave**

Requests for unpaid leave will be considered by the customer on an individual basis and only in extreme circumstances. Unpaid leave should not be granted to employees until paid annual leave has been exhausted.

## **Absence and Sickness Policy**

### **Aim of this Policy**

This policy is designed to assist the company in effectively managing sickness related and other staff absences. The company recognises the importance of ensuring that employees are supported through any periods of absence and

# Employee Handbook

their subsequent return to work. Through an effective Sickness and Absence Policy the company will be better positioned to identify any potentially unsafe work practices, any issues affecting employee morale and any other underlying problems employees may be facing.

## Sickness Absence

Please advise your manager of the reason for your absence and likely return date (if known). This should be done before you are due at work on your first day of absence and should be made in person by a telephone conversation. If you cannot do this yourself, make sure someone else, does it for you. You should also contact CSRM HR and Payroll by email or phone that you are absent due to sickness.

If you are absent due to sickness for over 7 days (including Saturday and Sundays) you are required to obtain a Doctor's Statement of Fitness for Work to cover the 8<sup>th</sup> day of sickness onwards. Email your Fit Note to the HR Manager. Your Statement of Fitness for Work will indicate an end date or return to work date at which point you are expected to return to work. Private notes or copies of Doctor's Statements are not acceptable.

If you are absent from work for long term sickness or persistent sickness you may be asked to obtain, at your own expense, a private medical certificate from your doctor.

If you are away from work as a result of an accident at work you must inform CSRM HR, as soon as you become aware that you are likely to be absent. You must give details of the accident. Please also ensure the accident has been recorded in the accident at work log book and reported to your manager.

If you are clearly unwell and not fit for work then it is reasonable for managers to send you home on sick leave for your own protection as well as the protection of others, as we have a duty of care to provide a safe working environment. If you are asked to leave work before 12 pm due to sickness this day will be marked as an unpaid day.

Completion of your 'Fitness to work' form in a timely manner will ensure that any entitlement to Statutory Sick Pay can be paid correctly. Additionally, where absence exceeds 28 weeks, either as a single period or through linked spells, Employment and Support allowance replaces Statutory Sick Pay and the company will provide guidance on the procedures to be followed in order for individuals to make a claim for Employment Allowance.

For periods of absence over 7 days, a return-to-work interview should be conducted in order that: we can welcome you back and update you on any information you may have missed, we can ensure that you are fit to return to work and we can offer assistance to you in the event that any illness/injury requires further treatment. If you have good reason for not wanting your manager to know the reason for your sickness advise him/her of this and the meeting will be in confidence with HR.

It may be necessary in incidences of long-term or persistent absence to treat the matter as an issue of capability or conduct. In such circumstances the company will; -

- Investigate the absence through 'Return to Work Interviews' and if required obtain medical reports.
- Set time limits on the assessment of the employee and keep him or her informed of such.
- Consider adjustments to the job to facilitate a return to work or to allow the employee to do their job more easily, for example the implementation of flexible working arrangements.
- If necessary- follow the disciplinary procedure and ensure the employee is informed throughout the process.

Trigger Points for further action as a result of absence; -

- 3 or more periods in excess of 10 working days in a 12-month period

# Employee Handbook

- Persistent 5 days per absence in a 12-month period
- 3 or more occurrences in a 4-month period
- Absences showing trends or patterns

Tigger Points for persistent lateness, without having obtained prior permission from your immediate Manager. All lateness will be counselled by your Manager as to the reason for lateness, and advised of the consequences of further lateness. Occurrences of lateness will be dealt with as follows;

Disciplinary Offence	Disciplinary Penalty
5 instances of lateness during a 52 week period	Recorded verbal warning
3 instances of lateness during the following 4 week period	Written warning
3 instances of lateness during the following 13 week period	Second written warning
3 instances of lateness during the following 26 week period	Unpaid suspension (5 days) and final written warning

Two further lateness's within the next 13 weeks will render the employee liable to be dismissed.

Where CSRM is concerned by the level of your absence, it may require you to undergo a medical examination to determine your continued suitability to carry out your contractual duties. If you attend a medical examination at the company's request, you acknowledge and agree that you will sign a release form for the final report within five working days of the completion of the report.

Where the reason for your absence is known prior to the absence occurring (e.g., hospital treatment/day care), you must provide your manager with written supporting documentation.

During any illness, CSRM reserves the right to telephone you, or to make pastoral visits from time to time. Submission of a medical certificate or sickness self-certification absence form, although giving us the reason for your absence may not always be regarded by us as sufficient justification for accepting your absence. Sickness is just one of a number of reasons for absence and although it is understandable that if you are sick, you may need time off, continual or repeated absence through sickness may not be acceptable to us.

In deciding whether your absence is acceptable or not we will take into account the reasons and extent of all your absences, including any absence caused by sickness/injury. We cannot operate with an excessive level of absence as all absence, for whatever reason, reduces our resource requirement to our customer.

We will take a serious view if you take sickness/injury leave which is not genuine, and it will result in disciplinary action being taken.

Please note that falsification of sickness or unauthorised absence will lead to disciplinary action in accordance with the established procedures and, in extreme cases, may result in dismissal.

## Payments

You are entitled to statutory sick pay (SSP) if you are absent for four or more consecutive days because of sickness or injury provided you meet the statutory qualifying conditions. SSP is treated like wages and is subject to normal deductions.

Qualifying days are the only days for which you are entitled to SSP. These days are normally your working days unless otherwise notified to you. The first three qualifying days of absence are waiting days for which SSP is not payable.

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# Employee Handbook

Where a second or subsequent period of incapacity (of four days or more) occurs within 56 days of a previous period of incapacity, waiting days are not served again.

Where the circumstances of your incapacity are such that you receive or are awarded any sum by way of compensation or damages in respect of the incapacity from a third party, then any payments which we may have made to you because of the absence (including SSP) shall be repaid by you to us up to an amount not exceeding the amount of the compensation or damages paid by the third party and up to, but not exceeding, any amount paid by us.

## **Returning to Work**

If you have been suffering from an infectious or contagious disease or illness such as rubella or hepatitis you must not report for work without clearance from your own doctor.

Upon returning to work after any period of sickness/injury absence, you may be required to attend a “return to work” interview to discuss the state of your health and fitness for work. Information arising from such an interview will be treated with strictest confidence.

## **Covid-19**

The Company and Customer will continue to follow Public Health England (PHE) guidelines and Gov.Uk regarding processes and procedures relating to Covid-19.

## **Other Time Off**

### **Public Duties**

Under current employment legislation employees who hold certain public positions are entitled to reasonable time off during normal working hours to perform the duties associated with the position such as magistrates, local councillors, etc. Employees are not, however, entitled to payment for this time.

### **Jury Service**

Employees are entitled to time off work to fulfil their obligations with regard to jury service. In the event that you are summoned to attend for jury service, you must notify your Manager and HR Manager as soon as you receive the jury summons, giving details of dates that you are required to attend court. In the event that you are retained on jury service for a prolonged period of time, you have an obligation to notify CSRM and should keep in regular contact with us throughout this period.

You are expected to return to normal working as soon as you are released from your duties. You are reminded to ensure that expense claims are submitted to the Court in accordance with the available allowances. You are not entitled to payment for this time off as you are allowed to claim expenses from the Court to cover your costs, and also compensation for loss of earnings.

### **Military Reservists**

There is no right for military reservists to take additional time off to participate in military activities during peacetime. However, we will consider each request for reasonable time off to pursue military activities on an individual basis – please contact your HR Manager for further details.



# Employee Handbook

Government legislation will apply where an employee, who is a registered member of the Territorial Army, is called to serve the country in time of war.

## **Time Off for Dependants**

Employees are entitled to reasonable time off for unforeseen incidents involving a human dependant. This may be a member of your immediate family, a person for whom you are the primary carer, or where you are the only person who can provide assistance in a serious emergency.

The entitlement to time off in such circumstances is limited to what is reasonable to deal with the immediate problem and sort out any longer-term arrangements. This time off is unpaid. You should notify your Manager and HR Manager as soon as possible if you need to take time off for dependants.

## **Time off for Appointments**

Circumstances may arise where you need time off for medical/dental appointments, or for other reasons. Where possible, such appointments should be made outside normal working hours. If this is not possible, time off required for these purposes may be granted at the discretion of your manager.

## **Bereavement Leave**

Reactions to bereavement may vary greatly according to individual circumstances and the setting of fixed rules for time off is therefore inappropriate. You should discuss your circumstances with your manager and agree appropriate time off. This may be taken as unpaid leave or holiday leave.

Employees may take up to 2 days of unpaid bereavement leave without any impact on holiday entitlement. If an employee chooses to take further unpaid bereavement leave, we will support this wherever possible. Please note, however, that;

- Holiday entitlement will not accrue during unpaid bereavement leave that extends beyond the initial 2 days.
- Holiday accrual will be paused from the third day of unpaid leave and will resume upon return to work.

This does not apply to statutory Parental Bereavement Leave, during which holiday will continue to accrue as normal.

## **Statutory Parental Bereavement Pay and Leave**

Due to a change in the law on 6<sup>th</sup> April 2020, you can take 2 weeks' leave from the first day of your employment if your child dies before they turn 18 or was stillborn after 24 weeks of pregnancy.

You can take:

- 2 weeks together
- 2 separate weeks leave
- Only one week of leave

The leave:

- Can start on or after the date of the death or stillbirth
- Must finish within 56 weeks of the date of the death or stillbirth

The pay will be the Government Published rate or 90% of your average weekly earnings (whichever is lower) if you're eligible.

Claiming SPBP. If you are eligible (<http://www.gov.uk/parental-bereavement-pay-leave/check-if-you're-eligible>).

# Employee Handbook

## Carers Leave

### Purpose

This policy outlines employees' entitlement to Carer's Leave, ensuring they can take time off to care for dependants with long-term care needs, in accordance with the Carer's Leave Act 2023.

### Eligibility

Employees are eligible for Carer's Leave from their first day of employment. A dependant includes:

- A spouse, civil partner, or partner
- A child or parent
- A household member (excluding tenants, lodgers, or employees)
- A person who relies on the employee for care (e.g., an elderly neighbour)

### Definition of Long-Term Care Needs

A dependant qualifies if they have:

- A disability under the Equality Act 2010
- An illness or injury requiring care for at least three months
- A care need related to old age

### Leave Entitlement

Employees can take up to one week of unpaid Carer's Leave per 12-month period. Leave can be taken as:

- Half days (minimum)
- Full days
- A full week

For part-time employees, entitlement is based on their usual working week. For example, an employee working three days per week can take three days of Carer's Leave.

### Requesting Carer's Leave

Employees must:

1. Submit a request in writing to the CSRM HR Manager, specifying the reason and duration.
2. Provide reasonable notice before taking leave.
3. Await confirmation from HR before proceeding.

### Pay and Benefits

Carer's Leave is unpaid, but employees retain all contractual benefits during their absence.

### Additional Support

Employees may explore alternative leave options, such as:

- Flexible working arrangements
- Annual leave
- Compassionate leave (subject to employer discretion)

## Overtime Policy

The concept of OT is based on the planning of matching working hours to the needs of the successful delivery of our Customer JLRE Event requirement.

The standard full-time hours for CSRM are based on a 45-hour week or 9 hrs. per day working 8 am to 5 pm Monday to Sunday. When working or setting up Events there is a demand to work additional hours above these hours.

# Employee Handbook

A key benefit of the OT agreement is the ability to meet the customer's demands to deliver events.

## Key Points

- All OT or paid 'additional working days', must be agreed before the Event through the Event Coordinator or Manager to ensure the cost of any OT is incorporated into the Event Planning.
- OT will be paid only on whole hours worked over and above the contracted 9 hrs per day. The rate of hourly pay will be the same as your current hourly pay.
- All OT prior approval will be recorded on a spreadsheet held and updated by the Event Coordinator or Manager.
- The Event Coordinator or Manager will agree the OT with the employee. The employee will email the amount of overtime to CSRM Payroll by the 19th of the month.
- CSRM Payroll will contact the Manager for agreement of the OT before payment is made.
- Employees responsible for driving HGV Vehicles must adhere to the driving hours set by the Driver and Vehicle Standards Agency DVSA.

# Employee Handbook

## Flexible Working Policy

Eligible employees have the legal right to submit a formal request for flexible working and the company will deal reasonably with such requests. CSRM acknowledges the importance for employees in achieving a balance between work and personal commitments and will endeavour to grant requests where possible and with the agreement of our customer.

The statutory procedure requires that requests for flexible working (including any appeal process) are dealt with within two months of the written application, although this timescale may be extended by agreement. Where possible CSRM will ensure that decisions are made well within this timescale.

This policy does not form part of any employee's contract of employment and CSRM may amend at any time.

### Eligibility

In order to be eligible to request flexible working you must:

- be an employee
- not made more than two statutory requests for flexible working in any 12-month period,

### Scope of a request

If you are an eligible employee, you have a legal right to request:

- a change to your hours of work
- a change to the times you are required to work
- a change to your place of work.

Any change to your terms and conditions made as a result of a flexible working request will be permanent, unless we agree to a temporary variation.

### Content of your request

Flexible working can incorporate a number of changes to working arrangements such as a reduction or variation in your working hours, reducing the number of days you work each week and/or working from a different location i.e., from home.

You may therefore request a variation of your employment contract in respect of, for example:

- the hours you are required to work
- the times when you are required to work
- part-time working
- job-sharing
- working term-time only
- where you are required to work (as between your home and places of business of the company).

# Employee Handbook

You have the right to have the request dealt with reasonably, but this does not give you a right to a contract variation.

## Procedure

If you decide to make a flexible working request you must follow this procedure. However, before making an application you should think about:

- what working pattern will help you best achieve your aims
- the financial implications a change might have on you
- what effects, if any, the change will have on CSRM's or JLRE's business and how these might be accommodated.

Your application must be submitted to your HR Manager and must:

- be made in writing and dated
- state that it is an application under the statutory right to apply for flexible working arrangements
- state whether a previous application has been made by you to CSRM and, if so, when
- specify the change applied for and the date on which it is proposed that the change should become effective

Your HR Manager may agree to the formal request without discussing it with you (for example, if the details of your request have already been discussed informally).

We will arrange to meet with you promptly after receiving the application.

## Meeting

The time and place of the meeting will be convenient to both you and the HR Manager.

A work colleague or union representative may accompany you at the meeting. That employee will be permitted to confer with you during the meeting and to address the meeting (but not to answer questions on your behalf).

If your chosen companion will not be available at the time proposed for the meeting and you propose an alternative, mutually convenient time, the HR Manager will postpone the meeting to the time proposed by you. Alternatively, you should consider choosing another companion.

At the meeting the requested variation to your working arrangements will be discussed fully. The impact of the change, and your ideas for how any adverse impact could be minimised, will be considered. The meeting also provides the opportunity to discuss any alternative variations which would be acceptable. CSRM may suggest implementing an agreed trial period for the new arrangements.

## Agreement

If CSRM agrees to the application you will receive written confirmation which will specify the contractual variation agreed to and state the date on which the variation is to take effect.

Once CSRM has agreed to the changes requested in your application, a permanent variation of your contract will result, unless we agree otherwise. Once a change has been made, you cannot revert to the previous terms and conditions of your employment.

# Employee Handbook

You may make two applications for variations (whether your first application was successful or not) within a 12 months period.

## Refusal

If your request is refused, the written notice will identify on which of the permitted grounds (listed below) the application was refused. The letter will also provide an explanation as to why those grounds apply, and set out the appeal procedure.

The application may be refused on one or more of several grounds, these being that the proposed changes will result in:

- a burden of additional cost
- a detrimental effect on ability to meet our customer's demand
- an inability to re-organise work among existing employees
- an inability to recruit additional employees
- a detrimental effect on quality
- a detrimental effect on performance
- an insufficiency of work during the periods you propose to work
- a planned structural change
- any other ground allowed by regulations.

In deciding whether the above grounds are met, a wide range of criteria will be taken into account, including (by way of example only) the following:

- the business needs
- the suitability of the job for the flexible arrangements proposed, e.g., the nature of the work, the hours needed and the need for continuity and consistency
- the current balance of full-time and part-time employees and other flexible working arrangements within the department or team
- the feasibility of covering the remaining hours.

## Withdrawal of application

CSRM can treat an application as withdrawn under the statutory provisions where you have:

- notified your HR Manager, orally or in writing, that the application is withdrawn
- without reasonable cause, failed more than once to attend a meeting or appeal meeting
- without reasonable cause, refused to provide your HR Manager with information required in order to assess whether the contract variation should be agreed to.

Your HR Manager will confirm the withdrawal of the application to you in writing unless you have already provided written notice of the withdrawal.



# Employee Handbook

## **Appeal**

It is the CSRM's policy to allow an appeal against a decision to refuse an application for flexible working. If you wish to appeal you should do so within seven days after the date on you were notified of the decision. The notice of appeal must be addressed to the Managing Director in writing, setting out the grounds for appeal.

The Managing Director or external HR consultant will hold a meeting with you to discuss the appeal. The time and place of an appeal meeting will be convenient to both you and the company. You have the same right to be accompanied by a work colleague or union representative as at the initial meeting.

After the appeal meeting, the Managing Director or external HR consultant will write to you with a decision. If the company upholds the appeal the letter will specify the contract variation agreed to, and state the date on which it is to take effect. If the company dismisses the appeal, the letter will state the grounds for the decision and contains an explanation as to why those grounds apply.

# Employee Handbook

## Capability Policy and Procedure

CSRM is committed to ensuring that staff achieve high standards of performance and are supported in this by their Managers, Deputy Managers, Lead Instructors/Tour Hosts.

The Capability Policy and associated procedures are to help Managers achieve improvements in the performance of CSRM employees through advice, coaching, guidance and support. The management of employee capability will be conducted in a positive and constructive way, with the emphasis on identification of concerns, developing performance in areas identified as needing improvement, providing reasonable adjustments for employees with disabilities, and giving the employee a reasonable chance to improve.

### Purpose And Scope of Policy

This policy and procedure deals with issues relating to an employee's:

- work performance; and/or
- attendance (including frequent intermittent or long-term health-related absences)

The policy sets out the procedure to be followed where there are concerns about an employee's capability to undertake their role and seeks to ensure that all parties have a clear understanding of the Capability procedure and its requirements.

This policy applies to all CSRM employees who have completed their probation. Performance of employees on probation is managed through the Probation Review Process.

CSRM employees are advised of the competencies required for their role and the objectives requested to meet as part of the performance review process. Standard of performance are measured and scored, please refer to the appraisal process for further information.

### Principles

The following principles underpin the Capability Policy and procedure:

- JLR Managers, Deputy Managers or Lead Instructor/Tour Hosts, will provide or facilitate appropriate advice, guidance, training and support to CSRM employees to assist them to reach the standards required
- You will normally be provided with an opportunity for concerns to be addressed informally before raising issues with CSRM HR
- Managers will deal firmly and fairly with performance concerns by following the formal Capability Policy and procedure, seeking advice and support from CSRM HR
- Where the employee has a disability, managers will ensure that reasonable adjustments have been fully explored and provided, where appropriate
- CSRM employees are expected to co-operate with the requirements of the Capability Policy and procedure and failure to do so may be considered under the Disciplinary policy

### Outcomes

The outcomes of this policy are that:

- The achievement of CSRM aims and objectives are enabled through high performing employees
- Performance concerns are dealt with in a fair and consistent manner
- CSRM acts in compliance with relevant statutory requirements.



# Employee Handbook

## **Monitoring And Review**

CSRM HR will monitor the formal stages of implementation of the Capability Policy and procedure and in particular formal decisions taken, for fairness and consistency.

## **When to use the Capability Policy and procedure**

The Capability Policy and procedure should be used where there are concerns about a CSRM employee's work performance and/or their attendance. Both are likely to impact on the employee's capability to achieve the standards expected by the Customer.

The Capability Policy and procedure runs alongside, but is not dependent on, the Performance Review Process, which is a structured process for reviewing and monitoring performance, whereas the Capability Policy and procedure sets out the formal steps to be followed if performance or attendance falls below the standard required.

## **Performance**

Performance concerns should be addressed with the individual promptly, as they occur. Management under the Capability Policy and procedure can be commenced, if performance warrants it, irrespective of the rating previously awarded under the performance review. There is no requirement to await until the End of Year performance reviews or amend the Performance rating at other times of the year, before taking action under the Capability Policy and procedure.

## **Attendance**

CSRM continues to view sickness absence as genuine incapacity and staff will be supported, where possible, if sickness absence occurs. However, high levels of sick absence will impact on the individual's ability to perform to full capacity and will impact on colleagues and on business performance. For this reason, high levels of sick absence are not sustainable. Therefore, where an employee's sickness absence reaches an unacceptable level, the Capability Policy and procedure should be used. The Sickness and Absence policy gives guidance on "trigger points" which indicate CSRM's view of levels of absence which are unacceptable.

## **Capability procedure**

CSRM HR advice must be sought where the formal stages of the Capability Policy and procedure are to be followed. Where the employee has a disability CSRM HR, will discuss with the Manager whether any new or further reasonable adjustments need to be put in place in order to support the employee. It is important that CSRM's obligations under the Equality Act 2010 are met.

## **Informal Stage**

The majority of capability issues should be able to be resolved promptly and informally through discussion advice, coaching and counselling. Action should normally start at the informal stage. However, note that in exceptional circumstances the steps do not need to be followed in sequence and it may be appropriate to go direct to the formal stage. Where the manager wishes to go directly to the formal stage CSRM HR will be involved, as this could result in dismissal if there are no performance improvements.

When a performance/attendance concern becomes apparent the Manager, should inform the employee as soon as possible to discuss the issue. The purpose of this discussion is to ensure that the employee understands:

- That their performance/attendance is not currently at the standard required
- What needs to be consistently achieved
- The general expectation of the employee in their role; and the action that will be taken if there is no sustained improvement.

# Employee Handbook

This meeting should address;

- Concerns about the employee's performance/attendance and examine any relevant documents regarding performance issues.
- Identify in what way and if possible, why the employee is failing to reach the performance/attendance levels expected giving factual examples where possible.
- The employee should be asked for their explanation, which should subsequently be followed up and checked where appropriate.

If the reason for unsatisfactory performance is lack of the required skills, the employee will, where practicable, be assisted through training and be given a reasonable opportunity to reach the required standards of performance.

Where the employee indicates that there may be disability related reasons for poor performance or attendance, there should be a discussion to explore whether there are any reasonable adjustments which need to be put in place to assist the employee. The matter should be referred to CSRM HR at this stage.

Although this is the informal stage, notes of the discussion must be provided to the employee, which should detail the required performance/attendance and indicate the regularity with which they will meet in order to address these matters. Regular meetings should be scheduled with the employee to provide feedback on progress. At the end of this period, the Manager must decide whether it is necessary to proceed to the formal stage.

Where performance/attendance has reached the required standard, the Manager should meet with the employee to confirm that the standards have been achieved and seek a commitment to maintaining the required standards.

## **Formal Stages**

The Formal stages will be managed by CSRM HR. The Capability Policy and procedure has the following formal stages:

- Stage 1 –initial meeting and setting of Stage 1 Performance Improvement Plan (PIP) when necessary
- Stage 2 - review and setting of Stage 2 Performance Improvement Plan (PIP) when necessary
- Stage 3 – final hearing which may lead to dismissal.

This is not an escalating procedure. It may be appropriate in some circumstances to move to a higher stage without having first been through the previous one.

## **Formal Stage 1**

Formal capability management should be initiated where informal management has either not worked or is not appropriate.

Formal Stage 1 begins with a meeting between the employee, the Manager and CSRM HR.

The employee will be invited to the formal stage 1 meeting and has the right to be accompanied.

In advance of this meeting CSRM HR will collate any paperwork to illustrate the performance/attendance concerns. Any documentation that the Manager or the employee plans to refer to during the meeting will be shared with the other party in advance of the meeting.

# Employee Handbook

## Meeting

The purpose of this meeting is to formally discuss the performance/attendance concerns and, where necessary, initiate formal action, in the form of a Performance Improvement Plan (PIP). Therefore, at this formal meeting CSRM HR and the Manager should:

- State the performance/attendance concerns that exist
- Invite the employee to respond/comment on the concerns raised and provide any mitigation they would like taken into account before a decision is reached
- Discuss what support has been provided, including training and any reasonable adjustments for employees with disabilities, check that these remain appropriate and whether further reasonable adjustments are necessary
- Invite the employee to suggest any other support they wish to consider.

Before reaching a decision, the meeting may be adjourned in order to consider the evidence and mitigation presented by the employee. The potential outcomes of the meeting are:

- Performance/Attendance is unacceptable
- Performance/Attendance is acceptable

## A Stage 1 Improvement Plan is set.

The employee should be advised that ultimately failure to meet the required standards may result in dismissal. Evidence or mitigation provided at the meeting means that no formal action is appropriate under formal stage 1 at this time. However, the employee should be advised that if performance declines the Capability procedure will be implemented at the formal stage without further informal action.

Following the meeting a summary of the discussion will be issued. If action under Formal Stage 1 is appropriate this will be in the form of a Performance Improvement Plan.

**A Performance Improvement Plan (PIP)** is the formal confirmation to the employee that performance is a concern and the specific areas requiring improvement.

At the completion of the Improvement Plan period CSRM HR and the Manager will meet with the employee to review performance/attendance against the plan. A decision, whether it is necessary to proceed to Formal Stage 2; will be confirmed in writing.

If it is clear that the requirements of the plan have been fully met, confirmation will be issued in writing that the Capability Policy and procedure has been paused but will be reinstated if there are further performance concerns again within 12 months.

## Formal Stage 2

The procedures and content of the Stage 2 meeting are similar to those described at Formal Stage 1. Whereas at the Stage 1 meeting, performance at the informal stage was being considered, at the Stage 2 meeting it is the outcome of the Improvement Plan set at Formal Stage 1 which is under consideration.

## Meeting

This meeting has two purposes:

# Employee Handbook

- To review performance/attendance that took place during the Stage 1 Improvement Plan period
- To identify and, where necessary, set the next steps

A discussion of the performance/attendance during the improvement plan and formally discuss concerns and, where appropriate, progress made. If performance/attendance has not reached the required standard the employee should be advised that a Stage 2 Improvement Plan will be set.

The potential outcomes of the Formal Stage 2 meeting are:

- Performance/Attendance remains unacceptable
- Performance/Attendance has improved to an acceptable standard

A Stage 2 Improvement Plan is set. The employee will be advised that failure to meet the required standards may result in dismissal.

If Evidence or mitigation provided at the hearing means that the performance/attendance is now deemed acceptable. The Capability procedure will be paused but will be reinstated within 12months if the same or similar issues arise again.

Following the meeting a summary of the discussion will be issued. If performance/attendance remains unacceptable the employee will be set a Stage 2 Improvement Plan. This Plan is a further formal notification to the employee that performance/attendance remains a concern and represents the second stage of formal action. The employee will be made aware that if there is not sufficient improvement they may be at risk of dismissal as a potential outcome of Formal Stage 3.

On completion of the Stage 2 Improvement Plan period a review of performance/attendance will be made against the plan. A decision will be made to proceed to Formal Stage 3; this decision will be confirmed in writing.

## Formal Stage 3

The general procedures and content of the Formal Stage 3 hearing are the same as those described at Formal Stages 1 and 2. However, as Formal Stage 3 may result in dismissal it will always be heard by CSRM HR and Manager.

The employee will be invited in writing, to the hearing and advised of their right to be accompanied. This letter will state that the potential outcome of Formal Stage 3 could be dismissal.

## Hearing

The hearing has two purposes:

- to review performance/attendance during the Stage 2 Improvement Plan
- to identify and, where necessary, set the next steps.

Any documentation that the Chair wishes to refer to during the course of the hearing will be shared with the employee in advance. The employee should also be advised that they may provide copies of any evidence or documents that they wish to be considered and these need to be submitted at least two working days before the Hearing.

**The hearing at this stage will include consideration of whether employment should be terminated because the employee has failed to meet the standards required.**

In addition to the standard points covered at Stage 1 and Stage 2 meetings, the manager chairing the Stage 3 hearing should remind the employee that a potential outcome of Formal Stage 3 is dismissal.

# Employee Handbook

Once all of the evidence has been heard, the Chair should adjourn the hearing to consider any new representations made by the employee and to consider the panel's decision.

The Chair should wherever possible convey the final decision to the employee in person after the adjournment. Following this the Chair will always write to the employee giving them the decision and informing them of their right to appeal.

The panel may decide that redeployment should be considered as an alternative to dismissal. In these cases, the employee will be advised that a decision to dismiss will be put on hold pending consideration of this and a decision will be put in writing to the employee.

If it is not possible for the panel to conclude that performance/attendance has improved sufficiently to end the Capability process but there are sufficient grounds or mitigating circumstances to warrant giving the employee a further opportunity to improve, consideration may be given to setting a further Stage 3 Improvement Plan. It is expected that this option will only be utilised in very exceptional circumstances.

The usual outcomes of the Stage 3 Hearing are:

- **Performance/Attendance remains unacceptable**
- **Improvement to an acceptable standard**

In exceptional circumstances the employee may be considered to have the skills to work effectively in an alternative role. In such circumstances the panel will adjourn to consider whether redeployment opportunities exist. This will usually require further conversations with CSRM HR.

If **redemption** takes place monitoring will continue as appropriate.

Where redeployment is not possible or appropriate the employee is **dismissed**.

Evidence or mitigation provided at the hearing means that the performance/attendance is now deemed acceptable. The Capability procedure is paused but will be reinstated within 12 months if the same or similar issues arise again.

## Dismissal

When an employee is dismissed, this will be from a date set in accordance with their contractual notice period. Pay will cease from the date employment terminates. Pay will not be reinstated during the appeal period.

However, should any appeal be successful and the employee reinstated, the employee will be restored to payroll with effect from the date pay ceased, and will be paid any back pay owing.

When an employee is dismissed on grounds of capability, the notice period is paid in line with the employee's contract and service.

## Redeployment

If performance/attendance remains unacceptable in the current position, one outcome of the Capability Hearing may be the consideration of an alternative role, where the skills required are different to those of the current role. Capability procedures for **absence** will **not** usually lead to redeployment opportunities, unless the absence is disability related, and a move may be a potential reasonable adjustment.

Redeployment is only possible if a suitable position exists and is agreed with the Customer.

Redeployment, if available, will normally be to a lower grade and will be on the terms and conditions applicable for that position. Protection of salary does not apply if an employee is redeployed due to capability issues.

# Employee Handbook

If the employee has a disability, it is expected that reasonable adjustments should be/have been provided to assist the employee in performing at the required level in their existing role. However, where reasonable adjustments are not possible for the role or have not been successful, redeployment will be considered as a reasonable adjustment. In these circumstances an assessment of skills will be undertaken rather than the need for a competitive application process.

Redeployment to an alternative post which requires retraining may also be considered as a reasonable adjustment.

If redeployment is being considered but a suitable alternative position is not available, the Capability Policy and procedure will continue.

At Stage 3 if the hearing panel is of the view that capability issues remain and no suitable alternative position is available, the employee will be dismissed.

## **Appeal**

The employee has a right of appeal at Formal Stage 3 only, and if the decision is redeployment to a lower grade or dismissal. The appeal must be submitted to the Stage 3 hearing Chair, within five working days of the decision. The appeal letter should set out the full grounds for appeal as this will be the basis on which the appeal is considered. All documentary evidence which the employee considers relevant to the appeal should accompany the appeal letter.

## **Appeal Decision**

The Appeal Manager will set out their decision in writing. Decisions at appeal should be made, where possible, within ten working days of the appeal hearing.

## **Long Term Sickness Absence or Repeated Short-Term Absence**

When capability concerns are absence related and the employee's absence is long term, these will be considered case by case.

The main purpose of this will be to achieve progress in facilitating a return to work wherever possible. The detail of how each case will be managed will be decided on a case-by-case basis.

Case management meetings will be informal until it becomes clear that the absence has become, or will become, unsustainable, at which point the employee will be invited to a formal meeting in accordance with the Capability procedure.

CSRM aims to deal with capability concerns as quickly as is practicable. A brief period of sickness absence may delay the process but if there are repeated short periods or one long period of sickness absence then at least part of the process may continue in the employee's absence, this may include a final decision, depending on the circumstances. In such circumstances, they may choose to consider written representations from the employee.

In certain situations, medical advice may be sought as to whether the employee is well enough to participate in the Capability process in the office. If necessary, with medical advice and with the employee's agreement, Capability meetings may be held away from the workplace.

## **Right of Accompaniment**

All formal meetings are conducted within the bounds of strict confidentiality and breach of confidentiality may result in disciplinary action. All participants, including the accompanying person, must respect the need for confidentiality. The accompanying person may:

- address the meeting but not answer questions on behalf of the employee;
- confer with the employee during the meeting;
- request an adjournment where necessary.

# Employee Handbook

## **Ongoing Monitoring following Formal Stages**

All decisions will remain 'on record' for one year and therefore if the improvement is only of a temporary nature, action will normally be resumed at the next stage of the Formal Capability Policy and procedure which may include Formal Stage 3.

## **Keeping records**

Managers dealing with performance issues should keep written records of each meeting with the employee at all stages, including during the informal stage, as these will provide evidence of discussions and the actions agreed. The length and format of the notes will depend on the nature of the performance issue and the circumstances around each case. Particularly in formal meetings the notes should be copied to the employee for their records and managers should be aware that any records kept are likely to fall within the GDPR guidelines and Data Protection Act.

# Employee Handbook

## Appraisal Process

In order to continue to develop you and our business, we need to ensure everyone has clear objectives, supported by a personal development plan. We want everything we do to align with the overall business plan for CSRM/JLRE ensuring everyone gets the development they need to enable them to play their part in the success of JLRE/CSRM.

Performance Management tools are in place to promote High Performance Working. Regular feedback from your Leads and Managers play an important part of the process along with an annual appraisal system, completed in February/March of each year.

CSRM are only able to review your performance on receipt of a completed signed appraisal form. Failure to complete an appraisal form within the required time scale and failure to sign your appraisal form, following the appraisal process, could result in you being excluded from any performance related review.

### New Starter

- You will be continually monitored with regular feedback sessions.
- As you come towards the end of your probation you will be invited to a review meeting.
- You will be asked to provide an overview of your performance in preparation for the meeting and you will be expected to give your opinion of your performance.
- Following the end of probation meeting objectives will be agreed.

### Existing Staff

- For those members of the team who completed probation some time ago an appraisal meeting will be arranged to set annual objectives and agree a training plan for the year.

## Guidance on using the Appraisal Form

### Current Performance

This is the section where you should highlight your achievements and any challenges that you have faced over the year and also how you would like to progress in the coming year.

### Objectives

This section is used to highlight the specific tasks and targets which you were set and have achieved throughout the period and to record the development activities you have undertaken.

### Competencies/Behaviours

This is the 'how' you achieve high performance in your role. Do the behaviours and attitudes you display match with those required by the business? If not, why not? What areas do you need to focus on?





# Employee Handbook

## Manager Comments

CSRM will obtain feedback from your JLR Manager to comment on your performance, to celebrate success and briefly paint a picture of the previous period to help to create clear direction for the forthcoming year.

## Performance Ratings

Please refer to the appraisal form for the performance rating descriptions.

A rating of 'unacceptable' will result in being placed on a Performance Improvement Plan, failure to improve performance could result in dismissal. Please refer the capability policy.

## Looking Ahead

This is the opportunity to look at the targets and priorities for the next 3 - 12 months aligning these with the future JLRE business goals and to look at what training and development you need.

**Business Objectives** will be agreed with key actions and a target date for achievement.

**Development Objectives** will be agreed for areas where it has been identified you require further development. This will be based on what you need to do more of, do differently or improve on. It could also be an area you need to learn from scratch to enhance your role or for career development.

This isn't just about training courses; it is about developing knowledge, understanding, new skills, gaining experience and even changing attitudes or behaviours. What areas have been identified for your development? What do you need to do more of, do differently or improve, or maybe even learn from scratch?

# Employee Handbook

## Internet and E-mail Policy

### Introduction

The purpose of the Internet and E-mail policy is to provide a framework to ensure that there is continuity of procedures in the usage of Internet and E-mail within the company.

### Internet

Attention must be paid to ensuring that published information has relevance to normal professional activities before material is released in the Company name and JLRE. Where personal views are expressed, a disclaimer stating that this is the case should be clearly added to all correspondence. The intellectual property right and copyright for CSRM and JLRE must not be compromised when publishing on the Internet.

The availability and variety of information on the Internet has meant that it can be used to obtain material reasonably considered to be offensive. The use of the Internet to access and/or distribute any kind of offensive material, or material that is not work-related, leaves an individual liable to disciplinary action which could lead to dismissal.

### E-mail

The use of the E-mail system is encouraged as its appropriate use facilitates efficiency. Used correctly it is a facility that is of assistance to employees. Inappropriate use however causes many problems including distractions, time wasting and legal claims. The procedure sets out the company's position on the correct use of the E-mail system.

### Procedures - Authorised Use

- a. Unauthorised or inappropriate use of the E-mail system may result in disciplinary action which could include summary dismissal.
- b. The E-mail system is available for communication and matters directly concerned with the legitimate business of the company. Employees using the E-mail system should give particular attention to the following points: -
  - all comply with JLRE company communication standards (e.g., email signatures, letter templates etc.)
  - E-mail messages and copies should only be sent to those for whom they are particularly relevant
  - E-mail should not be used as a substitute for face-to-face communication or telephone contact. Flame mails (i.e., E-mails that are abusive) must not be sent. Hasty messages sent without proper consideration can cause upset, concern or misunderstanding
  - if E-mail is confidential the user must ensure that the necessary steps are taken to protect confidentiality. The company will be liable for infringing copyright or any defamatory information that is circulated either within the company or to external users of the system; and offers or contracts transmitted by E-mail are as legally binding on the company as those sent on paper.



# Employee Handbook

c. The company will not tolerate the use of the E-mail system for unofficial or inappropriate purposes, including: -

- any messages that could constitute bullying, harassment or other detriment
- personal use (e.g., social invitations, personal messages, jokes, cartoons, chain letters or other private matters)
- on-line gambling
- accessing or transmitting pornography
- transmitting copyright information and/or any software available to the user
- posting confidential information about other employees, the company or its customer or suppliers.

## Use of Social Networking Sites

### Introduction

For the purposes of this policy, social media means any facility for online publication and commentary, including, without limitation, blogs, wiki's, social networking sites such as Instagram, Facebook, LinkedIn, Twitter, Tumblr, Google +, Flickr, YouTube and any new media becoming available, and taking part in discussions on web forums or online polls.

This policy is in addition to and complements any existing or future policies regarding the use of technology, computers, e-mail and the internet.

Employees are free to publish or comment via social media in accordance with this policy. Employees are subject to this policy to the extent they identify themselves as an employee of CSRM or JLRE (other than as an incidental mention of place of employment in a personal blog on topics unrelated to the company, or any other employee).

Publication and commentary on social media carry similar obligations to any other kind of publication or commentary.

All uses of social media must follow the same ethical standards that employees must otherwise follow.

- a. Social media identities, logon ID's and user names may not use the name of the company without prior approval from the Managing Director or Customer.
- b. It is acceptable to talk about your work and have a dialog with the community, but it is not acceptable to publish confidential information. Confidential information as detailed above.
- c. Privacy settings on social media platforms should be set at a level to allow anyone to see basic, profile information only. Other privacy settings that might allow others to post information or see information that is personal should be set to limited access. Be mindful of posting information that you would not want the public to see.
- d. Do not say anything that is dishonest, untrue or misleading. If you have a vested interest in something you are discussing, point it out. Be smart about protecting yourself and your privacy – what you publish will be around for a long time, so consider the content carefully and be cautious about disclosing personal details.

# Employee Handbook

- e. You must respect the laws governing copyright and fair use or fair dealing of copyrighted material owned by others, including the copyright of the company and customer. Do not use text, images, music or videos unless you have permission from the copyright holder to do so. You should never quote more than short excerpts of someone else's work, and always attribute such work to the original author/source. Creating a link to the work of others rather than reproducing it is good practice and will avoid copyright issues.
- f. You must avoid publishing anything contradictory or in conflict with the company website or with others at the company; be mindful of the unprofessional impression this might create. Feel free to be yourself, but do so respectfully.
- g. Do not publish ethnic slurs, offensive comments, defamatory comments, personal insults and obscenities, for example.
- h. Respect the privacy of others.
- i. Take care with topics that are considered objectionable or inflammatory – such as politics and religion.
- j. Make it clear that the views and opinions expressed are yours alone and do not represent the views of the company.
- k. Clients, partners or suppliers should not be cited or obviously referenced without their consent and approval. Never identify a client, partner or supplier by name without permission and never discuss confidential details of a customer engagement.
- l. If you witness misrepresentations about the company in the media, you may respond with the facts and with respect. Where possible, responses should be confirmed with the Managing Director first. If you publish opinions about others, make sure that what you say is factual and that it does not disparage the individual.
- m. Avoid arguments; brawls may earn traffic, but nobody wins in the end. Don't try to settle scores or goad competitors or others into inflammatory debates. Always make sure that what you are saying is factually correct.
- n. If you make an error, be honest about it and correct it quickly. If you choose to modify an earlier post, make it clear that you have done so. If someone accuses you of posting something improper (such as their copyrighted material or a defamatory comment about them), deal with it quickly; it is often better to remove it immediately to lessen the possibility of a legal action. However, never try to cover up a mistake or deny that you have made one – even if something is deleted, some users will still be able to view it and contradict your version of events.
- o. You must use your judgment and avoid using blogs to criticise or embarrass the company, clients, or your co-workers; it can be dangerous and is not advised – ever.
- p. Many social media users include a prominent disclaimer identifying who they work for and asserting that they're not speaking officially. Wherever possible, you must use a disclaimer saying that while you work for CSRM within JLRE, anything you publish is your personal opinion, and not the views or opinions of the company.
- q. Make sure that blogging does not interfere with your job or commitments to clients.

Violation of this policy will result in disciplinary action, up to and including termination of employment.

## Monitoring

CSRM reserves the right to monitor all traffic (including content, whether generated for business or personal reasons) with the assistance of JLR support. However, CSRM will not invoke this right without a good reason to do so, for example if we have cause to believe that there has been a breach of the Company's policies or procedures (such as the downloading and distribution of inappropriate material from the Internet), or that there has been criminal activity, or during the course of a disciplinary investigation, for training purposes, or where employees are on holiday or absent because of sickness.



# Employee Handbook

Monitoring is in the Company's legitimate interests and is to ensure that this policy on communication is being complied with.

The information gathered through monitoring will be retained only long enough for any breach of this policy to come to light and for any investigation to be conducted.

Information obtained through monitoring will not be disclosed to third parties other than our customer, unless the Company is under a duty to report matters to a regulatory authority or to a law enforcement agency.

Employees have a number of rights in relation to their data, including the right to make a subject access request and the right to have data rectified or erased in some circumstances. You can find further details of these rights and how to exercise them in the Company's Privacy Policy. If employees believe that the Company has not complied with their data protection rights, they can complain to the Information Commissioner.

# Employee Handbook

## Equality and Diversity Policy

We all have a responsibility to embrace and support this vision and must continue to challenge behaviour and attitudes that prevent us from achieving this. Using fair, objective and innovative employment practices, our aim is to ensure that:

### Age

Age diversity within the workforce is promoted and valued through:

- Challenging age stereotyping
- Recognising the benefits of a mixed-age workforce

### Disability

The abilities of disabled people are recognised and valued at all levels of the company through:

- Focusing on what people can do rather than what they can't.
- Challenging stereotypes about people with disabilities
- Making appropriate adjustments in the workplace to help people with disabilities achieve their full career potential.

### Gender Reassignment

People who plan to undergo, are undergoing, or have undergone gender re-assignment are protected against all forms of discrimination and harassment. We will take positive steps to support a trans-gender person and ensure they are treated with dignity and respect.

### Marital Status/Civil Partnership

People are treated fairly and equally in the workplace irrespective of their marital, civil partnership or family status.

### Pregnancy/Maternity

People will be treated fairly and will not be discriminated against because of pregnancy or pregnancy-related illness. We will take positive steps to support a pregnant person and ensure they are not denied any opportunities due to pregnancy or maternity.

### Race

The racial and cultural diversity of our communities is represented at all levels of the company through:

- Challenging racial stereotypes
- Understanding, respecting and valuing different racial and cultural backgrounds and perspectives.

### Religion or Belief

People are treated fairly in the workplace irrespective of their religious beliefs and practices or political opinions by recognising individuals' freedom of belief and right to protection from intolerance and persecution.

# Employee Handbook

## Sex

Women and men are fully and properly represented and rewarded for their contribution at all levels of the company through:

- Challenging gender stereotypes
- Supporting employees in balancing their life at work and at home
- Supporting employees who become pregnant and taking active steps to facilitate their return to work after maternity leave.

## Sexual Orientation

People are treated fairly in the workplace irrespective of their sexuality through:

- Respecting different lifestyles
- Challenging negative stereotypical views

## Part-Time Workers

CSRM is prepared to employ part-time employees in jobs which can be done satisfactorily on a part-time basis. It will always consider requests from employees wishing to transfer from full-time to part-time work or vice versa, with agreement from our customer.

This policy should be read alongside the Equal Opportunities statement.

## Sexual Harassment Policy

### Purpose of the policy

CSRM is committed to creating a safe, constructive working environment in which all employees are treated with dignity and respect. For this reason, we will not tolerate sexual harassment in the workplace. CSRM aim to create a culture of equality and respect between all employees.

To make sure this is understood throughout our organisation, we have created this policy for all our employees. The policy sets out:

- what we mean by sexual harassment
- how employees can report sexual harassment
- how CSRM will handle reports of harassment
- the actions CSRM can take against an employee who breaches this policy
- how CSRM will support those who experience sexual harassment

### Scope of the policy

This policy applies to all employees, including those who work part-time, or on fixed-term or zero-hours contracts. It covers conduct:

- at work in any capacity

# Employee Handbook

- whilst in any JLR/CSRM building
- whilst using JLR IT systems
- in any non-working situation where they are identifiable as an employee of CSRM

This policy covers actions:

- committed by an employee of CSRM during the course of their employment
- experienced by any employee of CSRM during the course of their employment
- committed in person and online

## Roles and responsibilities

### Senior managers and HR

Senior managers and HR have overall responsibility for this policy and will make sure:

- this policy is included in the Employee Handbook
- this policy is regularly shared with all employees
- it is known that CSRM has a zero-tolerance approach to sexual harassment
- employees receive relevant sexual harassment training

### Line managers

Anyone who manages employees must also:

- support and encourage employees to tell them about any instances of sexual harassment
  - foster a safe working environment
  - understand how to handle reports of sexual harassment
  - understand when conduct must be reported to the police
- provide employees who report sexual harassment with confidential support and advice

### All staff

Everyone in CSRM is responsible for implementing the policy. To make this happen, employees at all levels must:

- take responsibility for their own behaviour
- behave in line with JLR/CSRM's values
- respect and support their peers
- report any sexual harassment they experience
- report any sexual harassment they witness

In addition, and to make sure the policy is still accurate and up to date, HR will review once a year.

## What is sexual harassment?

Sexual harassment is unwanted conduct of a sexual nature that has the purpose or effect of:

- violating someone's dignity, and/or
- creating an intimidating, hostile, degrading, humiliating or offensive environment for that person

Unwanted conduct of a sexual nature includes a wide range of behaviour. A non-exhaustive list of examples include:

- sexual comments or jokes
- sexist jokes
- displaying sexually graphic pictures



# Employee Handbook

- suggestive looks, staring or leering
- propositions and sexual advances
- making promises in return for sexual favours
- sexual gestures
- intrusive questions about a person's sex life or discussing your own sex life
- sexual posts or contact on social media
- spreading sexual rumours about someone
- sending sexually explicit emails or texts
- unwelcome touching, hugging, massaging or kissing
- criminal behaviour, including sexual assault, stalking, indecent exposure and offensive communication

There are clear protections against sexual harassment in the workplace under the Equality Act 2010

Victimisation (in the context of sexual harassment) is when someone is treated badly because:

- they complain about sexual harassment
- it's believed they will complain about sexual harassment
- they help someone report sexual harassment

Victimisation is also unlawful under the discrimination laws in UK.

## Training

CSRM will provide its employees with sexual harassment training which will cover:

- what sexual harassment is
- what types of behaviour class as sexual harassment
- what to do if employees experience or suspect sexual harassment
- how employees can raise a complaint and how it will be dealt with
- how to contribute to a positive workplace culture to help prevent sexual harassment

Line managers will also be trained on how they can contribute to a safe working environment.

## Confidentiality

Every employee has the right to discuss or report sexual harassment confidentially.

In some cases, we might need to share information about the employee who made the complaint or during an internal hearing. Where this is the case, we'll consult with the employee beforehand and make sure this is done confidentially. We will at all times comply with any data protection responsibilities.

We will not tolerate the victimisation of employees who:

- make a report about sexual harassment in good faith
- contribute to an investigation

Those who victimise an employee for one of the above will face disciplinary action.

## How we address allegations of sexual harassment

Those who experience sexual harassment should keep a record of the incident or incidents. This will help with investigations if the matter is formally reported. This includes logging:

- the date and time incidents

# Employee Handbook

- details of what happened
- details of any witnesses

## Informal process

Someone who has experienced sexual harassment may feel comfortable trying to resolve the matter informally. They might want to:

- arrange an informal, confidential chat with their line manager and ask for advice and support
- speak to the person who carried out the sexual harassment and try to make them understand the effect their actions have had
- speak to the person who carried out the sexual harassment in the presence of a manager to try and make them understand the effect their actions have had
- ask a manager to speak to the person who carried out the sexual harassment

CSRM will fully support someone who wants to resolve the matter informally.

## Formal process

In some circumstances the person who experiences sexual harassment may want to formally report the matter. This might include:

- raising their concerns using CSRM's grievance procedure. This can be found in the Employee Handbook
- making a claim at an employment tribunal
- reporting the matter to the police

## Legal action

In some instances, sexual harassment could be considered a criminal offence. CSRM will respect the decision of the person whether they wish to report it to the police or not. If the matter is reported to the police, CSRM will help them with the investigation where it can.

## Investigation, record keeping and data protection

### Investigating allegations

If an incident of sexual harassment is not resolved informally, CSRM will perform a confidential investigation into the allegations.

CSRM will:

- interview everyone involved
- consider the circumstances surrounding the allegations
- consider the reporting person's feelings and perception of the conduct
- establish if the conduct can be defined as sexual harassment

If allegations are upheld, CSRM will decide what action will be taken next. This could be disciplinary action or a report to the police. Once a decision on action has been made, CSRM will update the:

- reporting person
- victim (if they didn't make the initial complaint)

# Employee Handbook

## Record keeping and data protection

CSRM will keep a record of all reports of sexual harassment.

The information regarding the complaint will be kept on the HR files of those involved including:

- the victim
- the perpetrator
- relevant witnesses (where appropriate)

Information on a reported act of sexual harassment will be kept confidential and only discussed and shared with those:

- who need to know
- involved in the report

In some cases, CSRM might report the conduct and share information with the police even if the victim does not want to. We will take this type of action if an incident involves:

- a hate crime
- physical violence
- sexual assault

When we take this kind of action, we will always consult the victim of the abusive conduct before a report is made. All information gathered, recorded and stored will comply with the Data Protection Act 2018 (DPA) and the General Data Protection Regulation (GDPR).

## Actions we will take against an employee who breaches our policy

If an employee breaches this policy, and we have sufficient evidence they've done so, they will face disciplinary action. We will take this action in line with our disciplinary procedure, which can be found in the Employee Handbook. Action will also be taken against those who make false allegations of sexual harassment or allegations in bad faith which they not to be untrue.

If we consider an employee's behaviour to have breached this policy and be gross misconduct, this will usually result in dismissal without:

- warning
- a notice period
- payment in lieu of notice

## If sexual harassment is committed by a third party

An employee might experience sexual harassment by a third party like a customer or supplier. If this happens CSRM will take steps to prevent recurrence. This could include but is not limited to:

- making sure interactions between the victim and the perpetrator are supervised
- making sure the victim does not have to interact with the perpetrator
- formally reporting the incident to the perpetrator's manager
- formally reporting the incident to the police, where appropriate

## Monitoring after the complaint and investigation

# Employee Handbook

Once an investigation into sexual harassment has been completed, CSRM will actively keep an eye on the issue for a short period of time. This is to make sure:

- the reported behaviour has stopped if the perpetrator has not been dismissed
- no one is treated unfairly because they either made or supported a complaint

If there is a recurrence of sexual harassment following on from an incident already reported, CSRM will re-engage this policy.

## **Support for those who experience sexual harassment**

CSRM is committed to making sure victims of sexual harassment:

- feel safe discussing what has happened to them
- are supported through the reporting process
- are supported after the report has been made

To do this CSRM will:

- make sure adjustments are made for the victim including time off for counselling or to take legal advice, if required
- ask the victim to what CSRM can do to help them
- provide information of where they can find support outside of CSRM

# Employee Handbook

## Grievance Procedure

The purpose of this procedure is to provide a fair and effective method of resolving individual grievances within a reasonable time of any particular issue being raised.

All formal grievances taken under this procedure must be put in writing. If you have difficulty in expressing your views in writing for any reason, please contact your HR Manager.

### Informal Discussions

If you have a grievance, you should discuss it informally with your manager or Lead. We hope that the majority of concerns will be resolved at this stage. There is no right to be accompanied by a companion at such informal discussions.

### Stage 1

If you feel that the matter has not been resolved through informal discussions, you should put your grievance in writing to your HR Manager. If your grievance concerns your manager or the HR Manager, the grievance should be raised with the Managing Director. CSRM will convene a meeting as soon as possible to discuss your grievance. The purpose of the meeting is to understand your complaint and investigate all the options. The meeting chair person may need to carry out additional investigations outside the meeting. At this stage (and at the appeal stage), you may, if you wish, be accompanied by a work colleague.

You will be notified in writing of the outcome within five working days, or as soon afterwards as is reasonably possible. If you are not satisfied with the outcome you may appeal against the decision to the Managing Director.

### Appeal Stage

You may request a meeting with the Managing Director. If appropriate, the Managing Director will be accompanied by an independent third party. Again, your grievance should be expressed in writing. It is the Managing Director's responsibility to try to resolve the matter and provide an answer within five working days. He will review the facts and carry out any additional investigation if appropriate, before reaching a conclusion. You will be notified in writing of the outcome. The Managing Director is the ultimate authority in all grievance matters and his decision is final.

### Note

The purpose of the grievance procedure is to explore genuine concerns connected with employment. CSRM takes this duty very seriously.

However, in certain circumstances, CSRM reserves the right to review or refuse to hear grievances: -

- Where the matters related to the grievance took place three or more months before the date of complaint.
- Where an employee raises a grievance that has already been addressed, unless new evidence is provided which justifies the re-opening of the matter. If on an initial assessment, the grounds for the grievance seem weak, CSRM will require the employee to submit more evidence for further investigation before convening a grievance meeting.

# Employee Handbook

- Where the employee raises a grievance which in the reasonable opinion of CSRM is frivolous or vexatious.
- Where CSRM has reasonable grounds for belief that an employee is using the grievance procedure to make deliberately false allegations, or as a form of bullying against a colleague or manager, it will be treated as a misconduct matter.

CSRM reserves the right to refuse to participate in early conciliation until it has had the chance to explore and attempt to resolve matters through its internal grievance procedure.

## **Data Protection**

The Company processes personal data collected during informal complaints and the formal grievance procedure in accordance with its data protection policy. In particular, data collected as part of informal complaints and the grievance procedure is held securely and accessed by, and disclosed to, individuals only for the purposes of responding to the complaints or conducting the grievance procedure. Inappropriate access or disclosure of employee data constitutes a data breach and should be reported in accordance with the Company's data protection policy immediately. It may also constitute a disciplinary offence, which will be dealt with under the Company's disciplinary procedure.

# Employee Handbook

## Disciplinary Procedure

### Purpose and Scope

The disciplinary procedure provides for disciplinary sanctions to be given for failure to meet the company's or customers standards of job performance, conduct (whether during working hours or not) and attendance, or for breach of any terms and conditions of employment.

The disciplinary procedure has three main objectives:

- To protect in an equitable way the safety and interests of all employees.
- To protect the legitimate interests of the company.
- To promote good relationships at all levels by ensuring that where action is carried out, it is done promptly, consistently and comprehensibly.

CSRM's aim is to encourage improvement in individual conduct or performance. This procedure sets out the action which will be taken when disciplinary rules are breached. Where it is necessary to take disciplinary action to protect either the interests of the company or its employees, the procedure followed will relate to the nature of the offence committed.

In your first year of employment CSRM reserves the right to apply a short form of the disciplinary process.

### Principles

The procedure is designed to deal consistently with disciplinary issues. No disciplinary action will be taken until the matter has been fully investigated. Where CCTV or other recording equipment is used CSRM reserves the right to use the data so captured in the disciplinary and grievance procedure process as it deems appropriate.

At every stage the employee will have the opportunity to state their case and, in formal disciplinary hearings, be accompanied by a fellow employee or accredited trade union representative if they wish. The companion can help the employee prepare their case, help them present the case, ask questions and sum up on behalf of the employee. The companion may not answer questions on behalf of the employee. There is no right to be accompanied in an investigation meeting or at an informal meeting.

Disciplinary penalties will be proportionate to the offence committed. It is open to the company to issue a first sanction at the final warning or dismissal stage where the disciplining officer reasonably believes that the nature of the offence requires it. An employee has the right to appeal against any disciplinary penalty.

Any appeal will be heard by the Managing Director (if not previously involved with the disciplinary process) or an independent third party nominated by the company.

Wherever possible, the investigation will be carried out by one person and the disciplinary hearing will be attended by a second person. However, in cases of less serious conduct or capability, CSRM reserves the right for the investigating officer to chair the meeting.



# Employee Handbook





# Employee Handbook

## **The Procedure**

### **Informal Discussions**

Other than in a matter of serious misconduct, where an employee's standard of conduct or performance is considered lacking, or a breach of contract is believed to have occurred, the Manager or Lead will normally draw the matter to the employee's attention in a private and informal way.

In most cases this informal discussion should resolve any difficulties identified. However, if the employee fails to improve, or sustain improvement, the formal procedure will commence.

### **The Formal Procedure**

#### **Notification**

If conduct or performance fails to meet acceptable standards, the matter will be dealt with by CSRM HR. The employee will be given 48 hours' notice in writing of a disciplinary meeting in the form of a letter providing the details of the alleged breach of discipline.

Where appropriate the letter will enclose supporting documents e.g., copies of paperwork, details of performance. All employees have the right to be accompanied by a colleague or an accredited trade union representative.

#### **The Hearing**

The HR Manager will conduct the disciplinary hearing.

Throughout the hearing, notes will be taken for the record. At the hearing the following will occur:

- The employee will be advised of his/her rights.
- The employee will be advised of all known facts relevant to the case.
- The employee will be given every opportunity to put forward his/her case and views.
- If the employee is accompanied their companion will have the opportunity to make representations on his/her behalf.
- There will be an adjournment to consider the facts.
- At the end of the hearing, where possible, the employee will be advised of the decision of the HR Manager
- If a disciplinary penalty is awarded, the HR manager will advise the employee of his/her right of appeal.

### **Disciplinary Warnings**

#### **Stage 1 – First Written Warning**

If conduct or performance is unsatisfactory, the employee will be given a first warning which will be recorded. The warning will be disregarded after six months satisfactory service.

# Employee Handbook

Examples of unsatisfactory performance or conduct:

- Unsatisfactory job performance;
- Persistent lateness;
- Minor negligence;
- Unauthorised absence from work;
- Unacceptable level of sickness absence;
- Unauthorised use of personal mobile phones during working hours.

If the matter under consideration is a misconduct matter the employee will be advised that further repetition of this, or any other misconduct, during the life of the warning will result in an escalation to the next stage of the disciplinary process.

If the matter under consideration is a poor performance matter and the employee has already been provided with a performance improvement plan PIP but has failed to improve to a satisfactory level, or further occurrences of poor performance during the life of the warning, will result in an escalation to the next stage of the disciplinary process.

This applies at every level of the disciplinary procedure.

## Stage 2 – Final Written Warning

If conduct or performance is still unsatisfactory, a final warning will be given making it clear that any recurrence of the offence or other misconduct will result in dismissal. The final warning will remain live for twelve months. If there is no repetition or other offence, it will be disregarded after that time.

In exceptional circumstances, if it is considered appropriate to do so, CSRM reserves the right to extend the warning or to impose a longer final warning to a maximum of 24 months.

Note that these periods are not necessarily the same as the period over which performance improvements are to be made and which will be specified in warning letters.

**Individuals will not normally be eligible for any pay review during a period of a live warning.**

## Stage 3 - Dismissal

If there is no satisfactory improvement or if further misconduct occurs, the employee will be dismissed.

Occurrences of gross misconduct are very rare because the penalty is dismissal without notice and without any previous warning being issued. It is not possible to provide an exhaustive list of examples of gross misconduct. However, any behaviour or negligence resulting in a fundamental breach of contractual terms that irrevocably destroys the trust and confidence necessary to continue the employment relationship will constitute gross misconduct.

# Employee Handbook

Examples of offences that will normally be deemed as gross misconduct include serious instances of: -

- Persistent unauthorised absence from work;
- Dishonesty, theft or fraud;
- Damage to the Company's property;
- Incapacity for work due to being under the influence of alcohol or illegal drugs;
- Physical assault, violent, abusive or intimidating conduct;
- Gross insubordination;
- Gross indecency;
- Failure to comply with relevant statutory or regulatory requirements;
- Sexual, racial or other harassment;
- Actions such as to seriously offend a client/customer and/or a work colleague;
- Unauthorised use or disclosure of confidential information;
- Falsification of records;
- Working for a competitor without permission;
- Reckless or serious misuse of a Company vehicle;
- Accepting a gift which could be construed as a bribe;
- Breach of health and safety rules which endanger the health and safety of others in the opinion of the Company;
- Conviction for any serious criminal offence whilst an employee of CSRM
- Downloading of or sending of inappropriate material in contravention of CSRM's E-mail and Internet Policy or breach of the Company's social media Policy;
- Loading or downloading unauthorised software, or any other action likely to allow a virus on to the system. Unauthorised use of USB storage devices;
- Publishing material in any form in which the Company is identified, or capable of being identified, and comments are made about the company or any of its employees which in the reasonable opinion of the company are detrimental. This includes content offered on social networking sites;
- Behaviour whether inside or outside work which may bring the Company into disrepute;

Note that if, after investigation, it is confirmed that an employee has committed an offence of gross misconduct (the list is not exhaustive), the normal consequences will be summary dismissal.

## Appeals

An employee who wishes to appeal against any disciplinary decision must do so within five working days of the receipt of the letter. The Managing Director will hear the appeal or arrange for an independent third party nominated by the company to hear the appeal. The named person will hear the appeal and decide the case as impartially as possible.

Where new evidence comes to light during the appeal which was not available at the original hearing, the person hearing the appeal will be permitted to hear the new evidence as part of the appeal.

The decision of the appeal officer is final and there is no further right of appeal, even where new evidence has been heard at the appeal stage.

# Employee Handbook

## **Data protection**

The Company processes personal data collected during the investigation stage and any subsequent stages of disciplinary action in accordance with its data protection policy. In particular, data collected as part of the investigation stage and any subsequent stages of disciplinary action is held securely and accessed by, and disclosed to, individuals only for the purposes of completing the disciplinary procedure. Inappropriate access or disclosure of employee data constitutes a data breach and should be reported in accordance with the Company's data protection policy immediately. It may also constitute a disciplinary offence, which will be dealt with under this disciplinary procedure.

## **Suspension**

CSRM reserves the right to suspend an employee on full pay during a disciplinary investigation. The decision to suspend will be confirmed in writing. This letter will set out the terms of the suspension.

The suspension will be for as short a time as is reasonably possible in the circumstances. The employee must remain available to answer CSRM's questions at all times during a period of suspension.

During the period of suspension, the employee will be paid their normal daily pay. Where an employee falls sick during a disciplinary suspension CSRM will pay Statutory Sick Pay (SSP) in accordance with the usual SSP rules.

## **Hearing in the Absence of an Employee**

While CSRM will make every effort to ensure that an employee is able to attend a disciplinary hearing, we reserve the right to hear a case in his/her absence if, after two attempts to reschedule, he/she has failed to attend the hearing.

## **Grievance**

Where a grievance is raised during any part of the disciplinary procedure (whether informal, investigating or formal), then CSRM reserves the right to deal with the grievance concurrently with the discipline process.

# Employee Handbook

## Dismissal for Some Other Substantial Reason (SOSR) Procedure

### POLICY STATEMENT

The Employment Rights Act 1996 included a reason for fair dismissal referred to as some other substantial reason (SOSR). This is defined as a reason of a kind such as to justify a dismissal, not related to any of the other fair reasons, which are: conduct, capability, redundancy or to comply with a statutory enactment.

This procedure sets out the process that should be used where it is considered that dismissal of a CSRM staff employee on the grounds of SOSR is necessary. It complies with the ACAS Code of Practice and ACAS Guide to Discipline and Grievances at Work 2009. This procedure does not cover the standard processes and management of misconduct, performance, redundancy, retirement or sickness absence.

### Purpose And Scope of Policy

Due to the nature of CSRM's relationship as a supplier of resource to JLR. Stated in Schedule of Responsibilities agreement between JLR (Buyer) and CSRM (Seller), Schedule A 2.1. In providing the Services at Buyer's premises, the Seller shall ensure that the Personnel comply with the Buyers Policies, risk assessments and health and safety rules and regulations. The Seller shall be entitled immediately and without notice to remove from their premises any Personnel, that do not comply with the Buyer Policies, or whose behaviour or conduct is otherwise unacceptable to the Seller.

Common examples of SOSR dismissal include (but are not limited to);

- A break down in trust and confidence
- Refusal to comply with JLR's Policies, risk assessment and health and safety rules and regulations to the nature that JLR request removal from their premises.
- An irretrievable breakdown in the working relationship between two or more staff (one of whom may be the JLR Manager) which cannot be dealt with as a conduct or performance issue and all reasonable steps to avoid moving towards dismissal have been considered.
- A conflict of business interest or pressure from JLR or other agency within JLR to dismiss that cannot reasonably be managed by the employee remaining in post.
- Where the employee is absent without leave (e.g., failure to return to work) or has their driving licence revoked which is required to work within JLR or has a sentence of imprisonment imposed.
- Business restructuring/reorganisation where there is no actual redundancy situation but new organisational terms and conditions are being imposed for genuine substantial business reason(s) but proposed changes are refused by employee(s).
- Where as a result of a service transferring under the TUPE regulations, there are economic, technical and organisational reasons entailing a change in the workforce that require a dismissal of an employee.

If the employee should be dismissed for SOSR, the following procedure must be followed;

The employee needs to be invited to a potential dismissal meeting to include details of the reasons for considering dismissal, any supporting evidence and potential outcomes. The notification should contain sufficient information about the issue and its possible consequences to enable the employee to prepare a response.

Given the nature of this procedure and potential reasons for SOSR dismissal, it may be necessary to conduct an investigation. If an investigation is required, then this must be transparent, fair and proportionate to the issue under consideration to establish the facts and circumstances of the case.

# Employee Handbook

It may be necessary to suspend the employee whilst an investigation is undertaken, in this instance the employee must receive a letter confirming the suspension and will be requested not to enter JLR's premises or to be in contact with other staff members.

The employee will be invited to attend a potential dismissal meeting with a chosen/appointed representative to present their case.

Any evidence relied on/referred to at the meeting should be issued to the employee on invite to the meeting. The employee will have the opportunity to submit their response or any documentation they would like to rely on/refer to at the meeting.

During the meeting any further options to avoid dismissal must be considered. Any defence submitted by the employee in an attempt to overturn the decision will be submitted to JLR. As a supplier to JLR with no other customers, JLR will have the final decision.

Where dismissal is a consequence of a business restructure/reorganisation with new organisational terms an offer of re-engagement on different terms and conditions will be considered.

If redeployment of an employee is possible i.e., within another area of JLR if there is a breakdown of a relationship with one JLR Manager then in an event of an employee refusing a re-engagement offer, then the dismissal decision will stand and employment will terminate for reasons of SOSR without further review or right of appeal.

Payment will be made to the employee for any notice period, which may be required to be taken as 'Garden Leave'. Any accrued holiday will be required to be taken within the notice period. Payment in Lieu of notices, will be considered by mutual agreement to include payment of any accrued holiday entitlement.

The employee will be informed of the decision to dismiss once all considerations have been exhausted. The employee will have the right to appeal against the decision to dismiss within 5 working days of the date of the written confirmation of the decision to dismiss, stating the grounds of the appeal.

The appeal will either be heard by the Director of the business or an independent HR Consultant.

The appeal meeting is the final stage in the procedure. There are no further internal appeals available to employees.

## Records kept

- The evidence against the employee
- The employee's response/defence
- Any findings made and actions taken
- Whether an appeal was lodged
- The outcome of the appeal
- Subsequent developments
- Notes of any meetings held

Records should be treated as confidential and be kept no longer than necessary in accordance with the Data Protection Act 1998. This Act gives individuals the right to request and have access to certain personal data.

Copies of meeting records should be given to the employee. In certain circumstances (for example to protect a witness) some information might be withheld.

# Employee Handbook

## Dignity at Work Policy

### What this policy covers

This policy sets out CSRM's commitment to create a working environment free from hostility in which individuals are valued for their contribution and can develop to their full potential.

Unacceptable behaviour in the workplace may typically involve bullying or derogatory statements, unwanted spoken or physical advances, and personal treatment which is unfair and interferes with the employee's performance, undermines job security, or creates an intimidating work environment.

### Your rights and responsibilities

CSRM expects everyone to relate to each other professionally, in a manner which recognises everyone's right to dignity at work. Bullying or harassment in the workplace will not be tolerated.

All employees are required to conform to acceptable standards of behaviour towards colleagues, irrespective of status.

It is important that those making complaints do so in the honest and genuine belief that they are being bullied or harassed.

### The Company's responsibilities

CSRM will ensure that adequate resources are made available to promote respect and dignity in the workplace and to deal effectively with complaints of harassment and bullying.

Information shared or obtained during the handling of a complaint will be treated sensitively. The question of maintaining information in confidence will be discussed with all of those involved, but it is important to recognise that certain types of information will have to be shared with individuals as necessary within CSRM to help the decision-making or remedy for the person making the complaint, or during any appropriate disciplinary action taken against the person responding.

### Informal approach

Any employee who feels that they are being bullied or harassed should make a personal approach to the offending person, clearly stating their objections and the effects the behaviour has on them.

If an employee feels they are not confident to make this approach alone, they may want to be accompanied by a colleague.

If the personal approach is too upsetting for the employee, they may ask a third party (colleague or manager) to approach the person on their behalf in the first instance.

### Formal approach

Where the informal approach proves to be unsuccessful, the complainant should report the matter to their HR Manager. The complaint can be made orally, but must be confirmed in writing.

Where the allegations involve harassment by the Customer, the letter of complaint should go directly to the Managing Director.

A full and fair investigation will be undertaken; ensuring matters are handled sensitively and confidentially at all times.

# Employee Handbook

## **Disciplinary action**

If after investigation it is clear that unacceptable behaviour has occurred, the perpetrator will be required to attend a disciplinary hearing in accordance with the company's disciplinary procedures. The complainant/s will also be notified in writing.

## **No action taken**

Where it has been found that unacceptable behaviour has not occurred, this outcome will be confirmed in writing to all parties.

## **Dissatisfaction with the outcome**

If the complainant remains dissatisfied, they must submit a detailed formal complaint to the Managing Director as detailed in the company's grievance procedure.

## **Malicious false allegations**

CSRM will treat malicious false allegations very seriously and this may result in disciplinary action up to and including dismissal.

## **Mediation**

Mediation may be suitable in some types of cases following an informal or formal dignity at work complaint e.g., where the unresolved issues are related to difficulties with communication and/or understanding. Mediation could be invoked where the work-related issues have been dealt with by the company, but personal issues still remain between the parties as they continue to work together. Mediation is a voluntary process and both parties must agree to engage in the process



# Employee Handbook

## Personal Relationships at Work Policy

### Scope and purpose of policy

It is recognised that some employees will be related or will develop personal relationships at work. The company does not intend to discourage those in personal relationships from applying to work for CSRM or to develop and progress within the company.

It is also acknowledged that where such relationships occur, the majority of staff behave in a professional manner. Personal relationships in the workplace can lead to problems, these range from complaints of favouritism and unfair treatment to potential conflicts of interest where there is a direct reporting line between the two employees.

This policy outlines the expectations placed on members of staff and their managers so that such situations are dealt with fairly and consistently. It is also intended to protect staff so that they are not open to allegations of:

- impropriety
- bias
- abuse of authority
- conflicts of interest
- fraud.

The Policy also provides a process and procedures to ensure there is no conflict of interest as a result of a personal relationship at work, for example, in promotion decisions.

### Definitions

For the purpose of this policy personal relationships are defined as:

- family relationships including spouses and partners; or
- close personal friendships, including romantic attachments and extra-marital affairs.

This definition applies to opposite sex and same sex relationships. The term “partner” will be used generically to describe an employee involved in a personal relationship regardless of the nature of the relationship.

It is recognised that relationships may arise or occur between members of staff within CSRM and other companies with whom it has a contractual association. The following procedure still applies and it is expected that the employee will make their manager aware of the relationship. The matter will then be raised with the appropriate manager within the contracting company.

### Employees’ responsibilities

Where a personal relationship exists between members of staff in the same department or a related area, it is their responsibility to declare this to their respective Manager. Where the relationship exists between a member of staff and their manager, it is the responsibility of both to inform a more senior Manager.

Where a job applicant has a personal relationship with an employee within the area in which they are applying to work or with the manager, this must be declared at application stage. It is also expected that the member of staff who is already employed informs the HR Manager of the relationship. That member of staff will not be involved in the recruitment and selection procedure for the vacant post.

# Employee Handbook

Employees in personal relationships will be expected to maintain professional working relationships whilst at work and when representing CSRM on business related activities.

Requests from partners in personal relationships to take time off work simultaneously will be accommodated wherever possible. There may be difficulties in granting them, however, as the needs of other team members also need to be taken into consideration.

Employees who are in personal relationships should take all reasonable steps to ensure that those involved are neither disadvantaged nor advantaged unfairly and employees involved in relationships at work should exercise a professional manner at all times.

## **Procedure for dealing with breaches of this policy**

Where personal relationships create difficulties in the workplace, the relevant Manager will initially try to deal with the situation informally. It may be necessary to deal with staff in a more formal manner, however, through use of the disciplinary or other appropriate procedure.

Any members of staff that fail to declare their relationship at the point of application to the company or during their employment may be subject to disciplinary action.

## **Appeals**

Employees who wish to appeal against any disciplinary action arising from a breach of this policy should use the Company's Disciplinary Appeals Procedure.

If employees feel they have been treated unfairly as a result of their personal relationship with another member of staff, they should initially raise this informally with their manager or HR Manager.

# Employee Handbook

## Whistle-blowing Policy

If you believe that the company is involved in any form of wrong doing such as:

- committing a criminal offence;
- failing to comply with a legal obligation;
- endangering the health and safety of an individual;
- environmental damage; or
- concealing any information relating to the above;

You should in the first instance report your concerns to your JLR Manager or HR Manager who will treat the matter with complete confidence. If you are not satisfied with the explanation or reason given to you, you should raise the matter with the appropriate company or body, e.g., the Police, the Environment Agency, Health and Safety Executive or Social Services Department.

If you do not report your concerns to your JLR Manager or HR Manager may take them direct to the appropriate company or body.

The Public Interest Disclosure Act 1998 prevents you from suffering a detriment or having your contract terminated for 'whistle-blowing' and we take very seriously any concerns which you may raise under this legislation.

We encourage you to use the procedure if you are concerned about any wrong doing at work. However, if the procedure has not been invoked in good faith (e.g., for malicious reasons or in pursuit of a personal grudge), then it will make you liable to immediate termination of engagement or such lesser disciplinary sanction as may be appropriate in the circumstances.

# Employee Handbook

## Clear Desk and Workspace Policy

### Introduction

To improve security, confidentiality of information and to protect business standards, CSRM/JLRE adopt a Clear Desk and Workspace Policy.

Workspace can be defined as any and all areas of the business to include all departments, reception desks, storage areas and refreshment or toilet areas.

The policy ensures that our ways of working are aligned with JLR on ensuring all working areas met the customers very best impression of both CSRM and JLRE.

It also ensures that all sensitive and confidential information is properly locked away or disposed of when a desk/work area is not in use.

### Policy

The following will apply at all times;

- All paperwork must be kept to a minimum and when documents are not in use, they must be filed in the correct place to ensure ease of access for other colleagues.
- If you have a drink at your desk or have provided drinks for customers – make sure the mugs/glasses/cups are disposed of in the correct way as soon as possible.
- Desks, monitors, keyboards etc must be kept clean and in good order, please report any damages or faults to your manager. Screensavers must be appropriate, corporate images.
- Whilst working always consider the impression to the customer in terms of having an organised and presentable workspace.
- If you are working on a reception, it is important to keep the area organised and all items must be stored in the correct place at all times.
- Any personal items must be kept in a locked drawer and out of sight of the customers.

Whenever a desk is unoccupied for an extended period of time the following will apply:

- All confidential paperwork must be removed from the desk and locked in a drawer or filing cabinet. This includes storage devices such as CDs, DVDs, and USB drives.
- Computer workstations must be locked when the desk is unoccupied and completely shut down at the end of the work day.
- Laptops, tablets, and other devices must be removed from the desk and locked in a drawer or filing cabinet.
- Keys for accessing drawers or filing cabinets should not be left unattended at a desk.
- Filing cabinets containing confidential information must be kept locked when not in use and all documentation filed within.

# Employee Handbook

## Anti – Bribery Policy

### Definition

Bribery is the accepting of gifts, money, hospitality or other favours in return for providing something of value to the briber. In order to prevent commission of offences by the company or its employees, you must comply with the following requirements.

Failure to do so will result in disciplinary action and possibly, if the matter is sufficiently serious, summary dismissal for gross misconduct.

Accepting, requesting or offering any financial or other reward from or to any person, in return for providing some favour must not occur.

This information can be found in the JLR Code of Conduct, you can download the current version of the JLR Code of Conduct from the JLR Corporate website ([Jaguarlandrover.com](http://Jaguarlandrover.com)) or ask your manager for a copy.

### Business gifts

From time to time, customers, suppliers or other persons might offer a gift to an employee. This could be a small item, or something of considerable value. All gifts, however small, must be reported to your manager and recorded in the company gifts register. No gifts with a value of more than £25 may be accepted. If a gift is offered and then refused because of its value, this must be reported to your manager.

### Hospitality

From time to time, customers, suppliers or other persons might invite an employee to a hospitality event. All such invitations must be reported to your manager. Permission must be given by your manager before accepting any invitation.

### Responsibilities of Managers

Managers are responsible for keeping a record of all gifts and hospitality that are offered and/or received by CSRM employees working in their area of responsibility.

If they are concerned about any actions, they should contact the HR Manager immediately for advice.

### Expenses

Managers must authorise all expense claims from CSRM employees and are expected to check and sign all expense claims against receipts.

Any items of expenditure that give rise to concern will be fully investigated.

### Attempts to bribe



# Employee Handbook

Any employee who is concerned that he or she is potentially being bribed should report this matter to their manager immediately.

## **Donations to Companies**

No donations should be made to charities, political parties or other companies with the intention of gaining a business advantage.

## **Disciplinary action**

If you receive a gift which you fail to report to your manager this will be regarded as a disciplinary offence and will be dealt with in accordance with the company's disciplinary policy. Any employee found to have offered or accepted a bribe will face disciplinary action which could include dismissal for gross misconduct.

## **Raising concerns**

If you are concerned that acts of bribery are occurring in the company you should inform your manager in the first instance. If this course of action is inappropriate, you should inform another senior Manager.

# Employee Handbook

## Adverse Weather Policy

### Extreme weather conditions

During the winter months, or periods of serious flooding, extreme weather may seriously delay or prevent you from attending work. Whilst we expect you to make all reasonable effort to attend, there may be some occasions where this is not possible. This may be due to road closures or a lack of public transport due to prevailing weather conditions.

### Employee options

During severe weather, you have the following options available to you:

- Work from home: If you have been issued with a company laptop then you would be expected to work from home.
- Annual Leave: If you are unable to attend work, you may choose to take this time as annual leave.
- Unpaid leave: An alternative is to take this time as unpaid leave. If you do this, your annual leave allowance will remain unaltered.
- Overtime: Depending on the nature of your job role, it may be possible to make up this time, e.g., to work an extra hour a day.

### Call-in procedure

All employees are expected to telephone their manager to let them know if they are going to be delayed, or unable to attend work. You should also be prepared to explain what efforts you have made to get in to work.

### Non – Compliance with CSRM Policies

All policies require the participation of employees to be successful. Any employee found not to have complied with this policy may be subject to disciplinary action, up to and including dismissal.

# Employee Handbook

## Privacy Policy

### Aim of this Policy

The purpose of this policy is to set out the basis on which any personal data is collected and processed by CSRM.

Please read the following carefully to understand our views and practices regarding your personal data and how we treat it.

For the purposes of the UK Data Protection Act 2018 the Data Controller is CSRM Outsourcing Ltd whose offices are at Nelson's Wharf, Rugby Road, Stockton, CV47 8AA.

You can contact the Data Controller by writing to us at the above address or sending an email to [Samm@csrm.co.uk](mailto:Samm@csrm.co.uk).

If you have any questions about this Privacy Policy, please contact the Data Controller.

By visiting [www.csrm.co.uk](http://www.csrm.co.uk) and completing an application form you are accepting and consenting to the practices described in this policy.

### Information you give us

You may give information about yourself by filling in an application form on our site [www.csrm.co.uk](http://www.csrm.co.uk) or by corresponding with us by phone or email.

### Purpose of Processing and Legal basis of Processing

We collect and process data about you; -

To meet our legal responsibilities as an employer (for example to check you are entitled to work within the UK and or to meet our responsibilities under the Equality Act 2010).

To pursue the relevant and legitimate interests of the business (for example being able to process and retain information for managing the recruitment process and for making appropriate decisions about suitability of candidates for offers of employment).

The Company will not use your personal information for any other purpose than recruitment and employment activities.

### Job Applications

If you wish to apply for a vacancy on our website, you must complete the application form.

Your application form will be made available to our customer (JLR).

If you are successful your application form will be retained and form the basis of your personnel record.





# Employee Handbook

## Disclosure of your information

We may share your personal information with our customer (JLR).

As part of your employment with CSRm your data will be shared with our Customer JLR to allow them to contact you regarding your placement within JLRE and any training you will be required to complete.

Details may also be disclosed to a third party for the purposes of CSRm business requirements i.e., accountants for payroll and to our customer as part of the recruitment process and employment contract.

If your application is unsuccessful, then your personal data will be held for six months and then destroyed, unless we receive your written consent to add you to our talent pipeline to receive further information of vacancies available.

## Consent

Under the data protection legislation there are lawful grounds for processing your data. At any one time we can rely on any of the following grounds.

- Having your consent to collect and process personal data supplied by you and disclosing this information to our customer in connection with the recruitment process (which includes the process of employment contracts and the ongoing admin process involved, once your employment with CSRm commences)
- For compliance with legal obligations to which the Company is subject to
- For the performance of a commercial contract
- For the purpose of legitimate business interests i.e., collecting and processing information for employment and the ongoing administration process involved once you have gained employment.

## Security

CSRm Outsourcing Ltd take every precaution to protect your personal information. All personal information entered is protected and held in 'Dropbox', using Encryption Technology.

The security of your data is extremely important to us. Access to your personal data is only provided to our staff and third parties who help us to process data i.e., accountants for payroll and to our customer as part of the recruitment process and employment contract.

CSRm Outsourcing Ltd will not sell, trade or rent your personal information to others.

We will never use your information for any use beyond the stated permission you give us.

Transmission of information over the internet is not entirely secure and if you submit any information to us over the internet (whether by email, via our website or any other means) you do so entirely at your own risk.

We cannot be responsible for any costs, expenses, harm to reputation, damages liabilities or any other form of loss or damage suffered to you because of your decision to transit information to us by such means.

# Employee Handbook

## Retention Periods

### Your CV, application Form and Interview Notes

Your CV, application form and Interview notes will form part of your personnel file, if you are successful in your application and will be held for the entirety of your employment with CSRM.

If you are unsuccessful the information will be retained for a period of six months.

### Correspondence and enquires

When you make an enquiry or contact us by email, we will retain your information for as long as it takes to respond and for a further twelve months after which point, we will delete your information.

### Your rights

Under data protection law, you have the following rights;

- Right to be informed - We have an obligation to provide you 'fair processing information'. This is achieved by us having this Privacy Policy and ensuring it is regularly updated whenever there are changes in data protection law or our own policies and procedures.
- Right of Access - You have the right to see what personal information we hold about you; you are entitled to be given a description of the information what we use it for, who we might pass it onto and any information we might have about the source of the information. We are required to provide this information to you within one month of you making the request. If you make such a request the process is formally termed 'a Subject Access Request' (SAR).
- Right to Rectification - To request the correction of any information held.
- Right to Erasure - To request the deletion of your information. The right to erasure is not an absolute right. There are exceptions under data protection legislation where an organisation does not have to comply with a right to erase request.
- Right to Restrict Processing - To request that we restrict our use of your information.
- Right to Data Portability - To have the information transferred to another data controller i.e., our customer.
- Right to Object - To object to the processing of your information for certain purposes.
- Right not to be subject to automated decision-making including Profiling - You have the right to express your views, obtain an explanation of any decision and challenge it. CSRM does not use any automated processing in the recruitment process.
- Right to Withdraw Consent - To withdraw your consent to our use of your information at any time.

### Purpose of processing

The Company needs to collect, retain and process or use personal data in order to enter into a commercial contract with you and our customer to manage and meet its obligation under or connected with any such contract, to meet our legal responsibility in connection with the contract, or you, or our customer to pursue the relevant and legitimate interests of the business.

# Employee Handbook

## Your rights

As a data subject you have the following rights; -

- You can request from the Company access to and a copy of your data
- You can request the Company to correct or erase personal data
- You can request a restriction of processing your personal data
- You can request to exercise the right to data portability in certain circumstances

If you wish to exercise any of the above rights you can make a Subject Access Request (SAR's)

## Subject Access Request (SAR's)

To make a request, please apply in writing to the Data Controller CSRM Outsourcing Ltd, Nelson's Wharf, Rugby Road, Stockton, CV47 8AA.

Include the years you need the information for and the reason for the request. You'll also need to confirm your identity by sending CSRM your:

- full name
- National Insurance number
- date of birth
- address history for the last 5 years

Once we have verified your identify we will provide you with the information required within the timescale.

If you have any issues with the information provided in this policy then please contact Jackie Hensher HR Manager [Jackie@csrm.co.uk](mailto:Jackie@csrm.co.uk).

# Employee Handbook

## Health and Safety

### Safety

You should make yourself familiar with the Health and Safety Policy for your place of work and your own health and safety duties and responsibilities within the venue.

You must not take any action that could threaten the health or safety of yourself, other employees, customers or members of the public.

Under the H & S at Work Act 1974 and subsequent regulations and Plant/Workshop rules, you must wear protective clothing and equipment when provided and follow instructions on how to use it. Employees who use protective equipment and clothing are required to report defects or loss to their manager. Failure to do so could be a contravention of your health and safety responsibilities. Once issued, this protective wear/equipment is your responsibility.

You should report all accidents and injuries at work, no matter how minor, in the accident book that can be found in each venue. Please speak to your manager for an exact location.

You must ensure that you are aware of the fire and evacuation procedures and the action you should take in the event of such an emergency. Each site displays notices of fire evacuation procedures and ensures regular fire and evacuation drills are carried out. If you are a Company trained Fire Marshall, you will have additional responsibilities for the safe evacuation of people.

### COVID-19 Safety Measures

You must ensure you adhere to the COVID-19 Safety Measures as instructed by the venue, which may include wearing face coverings and completing Lateral Flow Tests.

You will also be asked to state your Vaccination Status which will be shared with JLR to assist in managing resource requirements at the venue if you are required too self-isolate.

### Display Screen Equipment – Guidance for Users / Operators of Desktop PCs

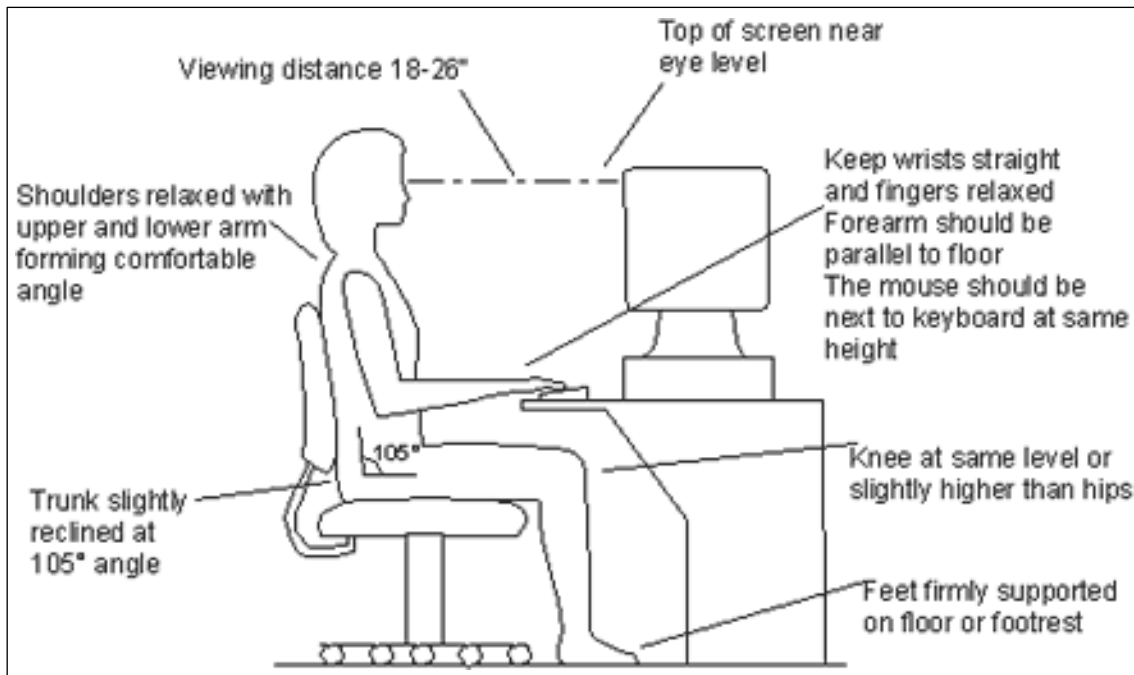
The purpose of a DSE workstation is to provide support for a comfortable work posture, allow vision and interaction of the person with the different input devices and needs to accommodate the wide variation in the size and shape of people. Each user of a DSE workstation should review their workstation and make any necessary adjustments to suit their needs. There are a number of different factors which will help to provide a comfortable work posture and reduce the possibility of discomfort. Guidance on how to adjust the workstation and set it up for your individual use is given below.

1. The seat should be stable, height adjustable, provide adequate back support (particularly for the lower back) and not put excess pressure on the back of the legs. Check what adjustments are available on your chair – exercise some caution in the first instance! The lower back should be supported by the shape of the seat back and the back angle is recommended to be slightly back from the fully upright position.
2. When using DSE, the user is recommended to adjust their chair so that their forearms are parallel to the floor and their hands are at the level of the middle row of keys on the keyboard. Your shoulders should be relaxed and not holding your arms in position.

# Employee Handbook

3. Feet should be flat on the floor, in some cases operators may require support for their feet once they have adjusted their seat to comply with the other recommendations outlined above.
4. There should be space under the desk for you to move your legs freely, move any storage boxes, bags etc., to more appropriate storage locations.
5. If the seat has arm rests adjust these to the right height to support your arms but be aware that this may mean that the seat arms can clash with the work desk. In some situations, it may be beneficial to remove the arm rests from the chair.
6. The general advice is that the top of the screen should be at the level of the user's eyes and recommended viewing distances of the screen are about an arm's length. Users who are 'hunt and peck' style operators may prefer the screen a little lower to reduce the range of movement of the head between the keyboard and the screen. The screen should be in line with the user and free from glare and reflections that disturb the view of the screen. You should also check the screen is clean.
7. Input devices such as a mouse should be located close to the person to avoid overreaching. Some people who do not use the number pad on the right-hand side of the keyboard may benefit from changing the mouse position to their left-hand side. The mouse button controls can be altered using the settings on the computer. The keyboard should be in front of the person and in line with the screen. Think about the tilt of the keyboard and aim to have neutral wrist postures (wrist straight, in line with the forearm). Check both the keyboard and mouse at intervals to see if they need a clean. Remove your hand from the mouse when not in use and use keyboard shortcuts if possible.
8. There should be sufficient space on the desk for the keyboard, paperwork required to complete their computer-based tasks and also room for the operator to rest their arms when not using the keyboard.
9. If you use a document holder then place it at a similar viewing distance as the screen and at a height that will minimise head movements. These may vary depending upon the task and your style of typing
10. Place equipment used frequently close to you (such as mouse, keyboard, telephone etc). Consider using a headset if you use the telephone and type at the same time. Holding the phone between your shoulder and chin is not recommended.
11. Take regular short breaks away from your desk, this may include getting up to collect documents from the printer. Also look away from the screen briefly while using DSE to change your point of focus. This reduces fatigue of the eye muscles.
12. If you are a user you are entitled to an eye and eyesight test, even if you already wear glasses. The eye and eyesight test will be provided through the company appointed free of charge. The purpose of this eye test is to decide whether you have any defect of sight which requires correction when working with a display screen. The frequency of repeat testing will be guided by the clinical judgement of the optician. Where the optician considers that you need special corrective appliances specifically for DSE work to correct vision defects at the viewing distance or distances used specifically for the display screen work concerned or because your 'normal' reading or distance vision glasses are not suitable, these will be provided and prescribed by the optician, from a pre agreed range at no cost to you.
13. If you use a 'hot desk' then take time at the start of your work period to adjust the workstation to suit your size and personal requirements.
14. Any problems you encounter while using your workstation should be discussed with your line manager.

# Employee Handbook



More information about Office Ergonomics is available at the following web site

- Working with VDUs – <http://www.hse.gov.uk/pubns/indg36.pdf>

## Additional Guidance for Users / Operators working with portable DSE

Points to consider for users of portable DSE are:

- Consider the weight to be carried – avoid overloading the computer bag with papers and other equipment.
- Set up the laptop on a suitable worksurface, avoid prolonged use with the computer resting on the lap.
- Minimise the time spent using portable DSE in non-ideal locations such as motor vehicles
- Take sensible precautions when carrying portable DSE, taking extra care in public places to avoid the risks of theft or mugging
- Breaks or changes of activity are particularly important for users of portable DSE.
- Take time to ensure that the workstation where a portable DSE is used is adjusted appropriately for the user.

## Handling of Chemicals

Whilst working within the customers' premises you may come across certain chemicals required for cleaning purposes.

All chemicals must be kept in a safe marked place with proper labelling and signage. Smoking and use of any fire items is strictly prohibited near the storage area of the chemical. Fire extinguisher must be kept near to the storage place of chemical. **Protective hand gloves, goggles, apron must be used** before handling of chemical.

The Manager will have access to all COSHH sheets relating to any chemicals used at the site. Please ensure you are familiar with the chemicals on site and follow the rules below when handling chemicals;

1. Follow all established procedures and perform job duties as you've been trained.
2. Be cautious and plan ahead. Think about what could go wrong and pay close attention to what you're doing while you work.

# Employee Handbook

3. Always use required PPE—and inspect it carefully before each use to make sure it's safe to use. Replace worn out or damage PPE; as it won't provide adequate protection.
4. Make sure all containers are properly labelled and that the material is contained in an appropriate container. Don't use any material not contained or labelled properly. Report any damaged containers or illegible labels to your manager right away.
5. Read labels and the material safety data sheet (MSDS) before using any material to make sure you understand hazards and precautions.
6. Use all materials solely for their intended purpose. Don't, for example, use solvents to clean your hands.
7. Never eat or drink while handling any materials, and if your hands are contaminated, don't use cosmetics or handle contact lenses.
8. Read the labels and refer to MSDSs to identify properties and hazards of chemical products and materials.
9. Store all materials properly, separate incompatibles, and store in ventilated, dry, cool areas.
10. Keep you and your work area clean. After handling any material, wash thoroughly with soap and water. Clean work surfaces at least once a shift so that contamination risks are minimized.
11. Learn about emergency procedures and equipment. Understanding emergency procedures means knowing evacuation procedures, emergency reporting procedures, and procedures for dealing with fires and spills. It also means knowing what to do in a medical emergency if a co-worker is injured or overcome by chemicals.

## Customers Premises

Whilst visiting or working at any of our customers' premises, you must ensure that you are aware of and strictly comply with all of their rules and requirements e.g., security, health and safety, smoking, parking, etc.

JLR Emergency number internally is 3333, calls will be received by the JLR Business Protection Control available at each site which are staffed 24/7 every day of the year. The Business Protection teams are trained to respond to medical emergencies. They will get to the scene faster than the emergency services.

Failure to comply with venue rules could result your removal from site and disciplinary action, which, dependent upon the circumstances, could result in your dismissal.

## Hygiene

Any exposed cut or burn must be covered with a first-aid dressing.

If you are suffering from an infectious or contagious disease or illness such as Rubella or Hepatitis you must not report for work without clearance from your own doctor.

Contact with any person suffering from an infectious or contagious disease must be reported before commencing work.

## Working Time Directive Policy

CSRM is committed to the health and safety of its employees and acknowledges its obligations with Working Time Regulations. To provide a safe working environment and a satisfactory balance between work and personal life.

# Employee Handbook

CSRM and JLRE Managers have a 'duty of care' to ensure that working hours are kept within reasonable limits and will monitor working hours for this purpose. Employees also have a duty to ensure that they are not working excessive hours and must inform their manager or HR Manager if they consider that they may be doing so.

The Working Time Directive sets down the entitlements of employees working hours, rest periods, annual leave and rest breaks.

## **Key Points**

1. All workers should not exceed 48 hours a week on average, normally averaged over 17 weeks. Should the employee wish to opt out they should complete Appendix 1 and return the form to CSRM HR Manager.
2. Zero Hour (ZH) employees working for more than one employer should still not exceed the 48-hour limit with regards to their total average weekly working time.
3. When working on JLRE Events and returning to the Venue, all employees are entitled to an uninterrupted rest period of at least 24 hours in each seven-day period, 48 hours in each 14-day period or two uninterrupted rest periods of at least 24 hours in each 14-day period.
4. The employee has a duty to inform the Manager or CSRM HR Manager as soon as possible if he/she is or may be at risk of being unable to take these required rest breaks.
5. All employees have the right to a minimum unpaid rest break of 20 minutes after working 6 hours. All CSRM employees receive a 30-minute paid break, when working a full day i.e., 9 hrs.
6. All employees are entitled to 34 days paid holiday (pro-rata for ZH employees). There is a requirement to take holiday leave if the JLRE Venue is closed.
7. Working time does not include traveling to and from home, however, it does include traveling from venue to venue for meetings.
8. If an employee considers that he/she has been treated unfairly with regards to working hours this should be raised informally with their manager. If still unsatisfied with the results, then this should be raised as a grievance through CSRM HR Grievance procedure.



# Employee Handbook

## Alcohol, Drugs and Smoking Policy

Under legislation we, as your employer, have a duty to ensure so far as is reasonably practicable, the health and safety and welfare at work of all our employees and similarly you have a responsibility to yourself and your colleagues.

If your performance or attendance at work is affected as a result of alcohol or drugs, or we believe you have been involved in any drug related action/offence, you may be subject to disciplinary action and, dependent on the circumstances, this may lead to your dismissal.

### Aims

CSRM recognises that for a range of reasons individuals can and do misuse drugs and alcohol, and that this can be a problem for the individual and for the business.

The effects of drug and alcohol misuse range from absenteeism, low productivity and increased disciplinary action to injury in the workplace. This policy is designed to protect all employees and the business, and to offer appropriate help and support to the individuals concerned.

### Definitions

Alcohol misuse is defined as consumption of alcohol during working hours, or attending work under the influence of alcohol.

Drug misuse refers to the use of illegal substances and the misuse of prescribed drugs and other substances such as solvents.

When we refer to working hours in the context of this policy, we include breaks and, on the way, to work.

CSRM does not permit:

- drug or alcohol misuse during working hours
- being under the influence of drugs or alcohol while at work
- encouraging others to misuse alcohol or drugs.

We recognise the difficulties that can be faced by those who misuse drugs and alcohol, and therefore:

- absence for treatment and rehabilitation for drug and alcohol problems will be regarded as normal sickness
- this policy will be monitored and reviewed regularly to ensure that it continues to be appropriate and effective.

### Confidentiality

If employee requests help prior to management being aware of poor performance, then in accordance with the disciplinary procedure any information regarding an employee's problems with drugs or alcohol will be treated as confidential, subject to our legal obligations.



# Employee Handbook

## **Disciplinary action**

Drug and alcohol misuse may become a matter for disciplinary action in accordance with the disciplinary procedure, subject to the letter and spirit of this policy, particularly where help is refused and/or impaired performance continues.

Possession of and dealing in illegal substances will be immediately reported to the police in all cases; there is no alternative to this procedure.

## **No Smoking Policy**

Our policy of no smoking or vaping on the premises or in company vehicles must be observed at all times. Legislation prohibits smoking in all enclosed and substantially enclosed premises in the workplace, and includes company vehicles. This policy applies to all employees, contractors, customers or members of the public. There is designated smoking area at all JLRE Venues.

Smoking breaks are to be taken within your paid 30 minutes break.

Failure to adhere to this policy may result in disciplinary action.

# Employee Handbook

## Mobile Phone Policy

### Purpose

To provide general guidance on mobile phones and rules relating to their use.  
To provide details of what to do if the phone is stolen or faulty.

### Eligibility

The allocation of a mobile phone is purely to meet a business need, it is not a replacement for a personal mobile. A mobile phone will be issued for the use of the holder for a specific job role, not to that individual per se. A standard justification form must accompany each application for a mobile phone from a JLR Manager and must be authorised by the JLR Venues Manager.

Mobile phones are not to be used whilst driving and anyone ceasing to be eligible for a company mobile phone or leaving the company must return the phone to CSRM in the same order that the phone was originally issued i.e., with the original box, charger, case and screen protectors.

### Key Points

#### User responsibility

#### Cost Management

Users will not receive a cost statement detailing the calls made and the rental and any other charges. There is no requirement to reimburse the company for any personal calls made within the guidelines. However: This does not imply that the issue of a company mobile phone allows the user to use it as their personal mobile; it is a business communication tool intended primarily for business use. The company does recognise, that users may need to make personal calls on occasions, e.g., in emergencies, calls home when travelling or working late. Such personal calls must be kept to a minimum and that personal call costs will not be significant in terms of overall costs.

JLR Managers will, on a monthly basis, monitor costs by each connection for any unusual activity. The Inland Revenue require the Company to demonstrate regular monitoring of call activity. Users may, on occasion, be requested to supply further details with regard to one or more of their call costs. Once contacted for further information, users must respond within the time requested.

The company reserves the right to withdraw company mobile phones at any time. Any abuse of mobile phones e.g., excessive personal use, calls to inappropriate phone lines could result in disciplinary action.

#### Equipment Safety and Security

Users of mobile phones are personally responsible for the equipment assigned to them and must therefore take any steps necessary to ensure protection of the assets under their control. This includes removing mobile phones from vehicles when they are not in use and ensuring that equipment is not left anywhere else where it is at risk.

The user is also responsible for the safe and appropriate use of any equipment. It is against the law to use a held mobile phone whilst driving.

#### Lost/Stolen Phones

In the event of a phone being stolen the user must immediately contact the police and report the theft. He/she must then contact the airtime provider Vodafone and report the theft to them as well as informing CSRM. In the event of loss, the airtime provider should be contacted, as should CSRM.



# Employee Handbook

If a mobile phone is stolen either from an unattended vehicle or elsewhere, either during personal or business use, the user may be held responsible for the cost of the replacement.

## **Equipment Hand-Back**

If, for reasons of leaving the company, changing jobs, the mobile phone is no longer required by the user then the phone should be returned to CSRM in the original box, with the charger. The phone should also be restored to factory settings and the passcode should be removed. If the phone is damaged arrangements need to be made to repair the damage at the cost of the user, to ensure the phone is returned in good working order to pass to another member of staff. If the phone is returned damaged the cost to repair the phone will be deducted from the users pay. Phones should not be transferred informally from one person to another.

## **Equipment Faults**

The user should contact CSRM who will endeavour to resolve the problem. The cost of all repairs to mobile phones will be the responsibility of the user, if found to be caused by misuse or negligence of the phone.

JLR/CSRM reserves the right to review the nature and content of data on its Company mobile phones. Regular monitoring and audits will be completed to ensure compliance with Company policy. If appropriate material is found, disciplinary action could be taken, which may result in dismissal.

# Employee Handbook

## Work Cancellation Policy

### **Purpose**

This policy is to ensure there is a balance between the business requirements and the employee needs, to promote a 'Work Life Balance'.

### **Zero Hours Only**

If JLRE cancel a job within 5 working days, they will endeavour to find gainful employment for you, this work may be different to the original booked job and you might need to travel to different locations, in which case all reasonable expenses will be paid.

### **Key Points**

Any alternative arrangements will be at the discretion of the JLR Manager.

Once you have agreed to make yourself available on the resource tool for a specific date(s) you must keep the date(s) available until released by the Customer.

Please ensure your resource tool remains updated with any other commitments outside of JLRE entered as N/A to avoid you being double booked, this will leave JLRE to book you on any of the days you have left blank. If you would like to change one of your available days to N/A you will be required to contact the JLR Manager or Support staff.

Please ensure you look at your resource tool to check the dates you have been booked to work.

If you need to cancel work due to sickness or an emergency, please speak to your JLR Manager and notify CSRM HR by email or phone.

# Employee Handbook

## Home Working Policy

### **Aim of this Policy**

This policy should be used by employees who have the ability to work from home i.e., they have been issued with a laptop and either have a company mobile phone or have an agreement to use their personal phone and charge back any business expenditure via the expense process.

Working from home must be agreed and authorised by your manager, as an alternative location other than your normal place of work.

### **Purpose**

The purpose of homeworking is to allow a level of flexibility i.e., in cases of emergency where you are unable to work from the customers agreed location. Your place of work will remain the same.

This flexibility will allow a continuation of work and is based on a mutual trust to continue to deliver a great service to our customer.

### **Eligibility**

This policy applies to all full-time employees. Not all positions lend themselves to this type of work flexibility.

Home working requests will be agreed with your manager and only utilised when required by our customer. Home working should not be used to replace appropriate care arrangements for any dependants.

Managers will consider the suitability of homeworking taking into account; the type of role and the work to be completed at home, self-motivation and discipline of individuals and their ability to work without direct supervision.

### **Health and Safety**

The wellbeing of all our employees is critical, employees have a responsibility to perform their duties in a safe manner and should adopt the same common-sense approach when working from home or an alternative location.

Homeworkers will be covered by the employer's liability Insurance, as if they are working from their normal place of work.

Please ensure you have completed a risk assessment of your home working environment, addressing the health and safety precautions, which can be requested from your HR Manager. The returned signed assessment form will then be held on your personnel file.

### **Terms and Conditions**

Home working is voluntary and is not a contractual right, it does not affect employee terms and conditions of employment such as work location detailed in contract of employment, pay, hours of work, overtime, holiday entitlement, SSP, expense claim entitlement etc.

Household costs which may be incurred as a result of an agreed home working arrangement (e.g., internet, phone, gas, electric, printer cartridges etc) will be at the employee's own cost and not reimbursable by the Company. Employees who submit expenses of this nature will be in breach of the home working policy.

# Employee Handbook

## Flexible Operating Policy

### Aim of this Policy

This policy is intended to be used to support other working time arrangements in times of unforeseeable circumstances (Force Majeure) that prevent the customer from operating the JLR Experience activities and supports our business continuity plan.

### Purpose

The purpose of the Flexible Operating Policy (FOP) is to allow a level of flexibility i.e., in cases of emergency where you are unable to work from the customers agreed location or from home to continue to be paid your usual pay as though working normally whilst on 'down-time' i.e., due to the closure of a JLRE facility.

### Eligibility

This policy applies to all full-time employees who are unable to work from home, due to not being issued with a business laptop or mobile phone or their role does not require the need to work from home.

### Notification Period

As this policy is intended for exceptional circumstances, it is agreed that implementation of the policy can be with immediate effect resulting in less than 24 hours' notice. CSRM will contact all effected individuals within this policy to inform them not to come into work, enforcing this policy.

### Duration

The duration of the FOP will cover no more than 20 standard working days down-time i.e., Monday to Friday up to four calendar weeks. If part-time then the four-week limit is applied resulting in a pro-rata payment of less than 20 days.

### Stand-Up time (reclaimed paid days)

Stand up time relates to the days the individual has been paid but not worked these days will be reclaimed by our customer within 2 years from the start of the policy being enforced.

When Stand-up is required, the following rules will apply; -

- Maximum stand-up per week is two days.
- All accumulated working days must come in line with the Working Time Directive (WTD)
- Stand-up time will normally be requested at a weekend to cover both Venue & Mobile Event support.
- On the previous agreement of the JLR Manager a half day may be agreed
- Stand-up days will normally be worked in the same area/facility. However; requested working days can include activities not normally performed or at one of the other facilities.  
Any such request will be discussed at the time of requirement and any travel payments would apply. This could include and not limited to; track maintenance work, general light facility maintenance (painting), covering administration roles and general support.

It is the JLR Managers responsibility to ensure FOP banked days are monitored and annotated on to the individuals Deputy account, ensuring all previously paid days are then reclaimed.

CSRM will ensure that a monthly statement is sent to the JLR Manager on the FOP days owed.

In reclaiming FOP days, a JLR Manager can provide 14 days' notice to request individuals to work a FOP Day, these include weekends. JLR Management will endeavour to provide a fair and reasonable request schedule. The intention is to be able to claim back a minimum of 1 FOP Day per month until the banked days have expired.



# Employee Handbook

Reasonable account will be taken in to consideration of personal circumstances when planning FOP Stand-up requests. If you refuse to attend an allocated FOP shift more than twice within a 12-month period then this could result in disciplinary proceedings being taken.

Leavers and moving within JLR;

- If you move within the JLRE business then your owed days move with you
- If you leave before the expiration of the 2-year payback period then 'owed' shifts will be removed from your final pay period
- If you move to an area in JLRE that does not offer the opportunity to pay back 'owed' days then any banked owed days will be classed as null and void
- If you take extended leave (over 28 days continuously), including and not limited to; sickness, bereavement, or maternity cover. An appropriate amount of FOP days will be removed from your owed account (i.e., 1 day for every 4 weeks off)
- If you prefer to swap an owed FOP Day with an annual holiday allocation day or TOIL Day then that will be permitted on agreement with JLRE Management and CSRM.

## Exclusions

If you are unprepared or unable to work weekend periods or if you are capable of working from home and have agreed to the policy and completed a risk assessment then you would not be considered for this policy an alternative solution may be annual holiday leave or with agreement unpaid leave.



# Employee Handbook

## Section 4

### Parental Leave Policy

The parental leave policy sets out the support available to employees with children aged less than 18 years.

You are entitled to unpaid parental leave of a maximum of 18 weeks for each child. You have the right to return to the same job or (if more than four weeks' leave is taken in one block) to a similar job with the same or better terms and conditions.

#### Entitlement

If you have been in our employment continuously for one year you are entitled to parental leave, provided you expect to have responsibility (i.e., parental responsibility) for a child. The leave should be taken before the child's 18th birthday. Both natural and adoptive parents may exercise these rights.

#### Before taking parental leave

As soon as practical after you have notified us that you intend to take parental leave, you should meet with your HR Manager to confirm that:

- you understand your rights to parental leave and the requirements to give appropriate notice (see below)
- the right to return to work is explained, together with any potential opportunities for flexible working
- arrangements for time off are known, and any possible health and safety concerns are discussed
- you are aware that the leave from work is unpaid.

#### Notice

Once you have given us notice of your intention to take parental leave, to include the dates on which the period is to begin and end, you must comply with any request to produce evidence of your entitlement. Leave must be taken in blocks of one week. If the child qualifies for a disability living allowance, however, the leave can be taken as single days or multiples of a day.

Notice must be given 21 days before the date on which the leave is to begin. You may not take more than four weeks' leave in respect of an individual child during a particular year.

If the operation of the business will be unduly disrupted by the parental leave, it may be postponed if absolutely necessary.

You are not entitled to parental leave unless you have complied with the request to produce evidence of your entitlement. In certain circumstances, we are entitled to postpone a period of parental leave.

# Employee Handbook

The type of evidence that we may request should show:

- your responsibility or expected responsibility for the child in respect of whom you propose to take parental leave
- the child's date of birth, or in the case of a child who was placed with you for adoption, the date on which the placement began
- where your entitlement depends on whether the child is entitled to disability living allowance (i.e., if you wish to take parental leave for a period of less than one week), the child's entitlement to that allowance.

No request will be made by us unless it is reasonable.

## **During parental leave**

Arrangements will be made for cover of your workload, and you will be kept in touch with any important work developments. We will also ensure that you remain on circulation lists for internal memoranda and will be included in invitations to work-related social events.

We will try to ensure that parental leave does not cause any long-term disadvantage to you concerning your training needs and self-development.

You are bound during the parental leave period by your implied obligation to the company of good faith and specific terms relating to:

- notice
- disclosure of confidential information
- acceptance of gifts
- whether you are participating in any other business.

The disciplinary and grievance procedures continue to apply, as does any entitlement to compensation for redundancy.

## **Returning to work**

If the period of leave is four weeks or less, you have the right to return to the same job. If the period is more than four weeks (because it followed on from other statutory leave), then the right is to return to the same job. If that is not practicable, you have the right to return to a similar job which has the same or better status, terms and conditions as the old job.

Where you are entitled to return to the same job this means a right to return with the seniority, pension rights and similar rights, and on terms and conditions not less favourable than those which would have been applied if you had not been absent.

You will not be subjected to any detriment by CSRM for taking or requesting parental leave.

# Employee Handbook

## Maternity/Paternity/Leave and Pay

You may be entitled to maternity/paternity/adoption/shared parental leave and pay in accordance with the current statutory provisions. If you (or your partner) become pregnant or are notified of a match date for adoption purposes, you should notify your HR Manager at an early stage so that your entitlements and obligations can be explained to you.

Every effort is made to encourage women to return to work from maternity leave. This policy applies to all employees, full-time and part-time.

We also recognise that arrangements for cover during the period of maternity leave and additional leave, as well as arrangements for communication during maternity leave, are important for ensuring smooth transitions at every stage.

### **Maternity leave**

When you receive medical confirmation that you are pregnant, you should notify your HR Manager of this, the expected week of childbirth (EWC) and the date on which you want or expect to begin maternity leave (which must not be a date earlier than the 11th week before the EWC). The medical practitioner responsible for your maternity care will provide you with a form MATB1 after your 20th week of pregnancy. This should be passed to your HR Manager.

As soon as practicable after the notification of your pregnancy, arrangements will be made for you to meet with your HR Manager. This will be an informal interview, the purpose of which is to ensure that:

- you understand your right to ordinary maternity leave and additional maternity leave, including the requirements for you to give appropriate notice
- the right to return to work after maternity leave is explained, together with any potential opportunities for flexible working
- arrangements for time off are known, and any possible health and safety concerns are discussed
- arrangements are made for a pregnancy at worker risk assessment to be completed
- you know your entitlements to payment during maternity leave.

Arrangements for cover during the period of maternity leave and for enabling you to keep in touch with any developments at work are important for ensuring smooth transitions at each stage. Before starting maternity leave you will be informed by letter confirming the arrangements, including keep in touch days whilst you are on leave.

As you have the right to return to your own job after ordinary maternity leave or to a suitable alternative one if this is not practicable after your additional maternity leave, we will seek to avoid putting you into a position of potential redundancy. In accordance with statutory requirements, where job losses are unavoidable, you will be given first consideration for any suitable alternative employment that may arise.

# Employee Handbook

At least two weeks before you are due to return to work, you may be invited for an informal meeting with your manager in order to discuss any material points concerning your return to work. These include:

- updating you on developments at work
- considering whether any retraining needs have arisen, because of staleness or new technical or other developments. It is our aim to ensure that your maternity leave does not put you at a disadvantage in relation to skills or other training needs
- confirming any flexible working arrangements which have been agreed

The interview will also provide an opportunity to discuss and explain any necessary and unavoidable changes to your work.

The opportunities for flexible working will depend on the needs of the business, but we recognise that many women will be interested in reducing their working hours or working at home for a period after their return from maternity leave. Any request for a contract variation should be made under the flexible working policy.

## **Time off for ante-natal care**

You are entitled to take time off during your normal working hours to receive ante-natal care. You should try to arrange your appointments at the start or end of your working day, whenever possible. Ante-natal care includes:

- appointments with your GP
- hospital clinics
- relaxation classes.

You may be required to produce an appointment card or some other document confirming all appointments other than the first. You should advise your manager that you will be absent as far in advance of your appointment as possible.

There will be no deduction from your salary for attendance at authorised ante-natal appointments, including any time spent travelling to and waiting for the appointment.

## **Ordinary maternity leave (OML)**

You are entitled to take 26 weeks' ordinary maternity leave, irrespective of your length of service or the number of hours worked each week, provided you comply with certain notification requirements (see below).

## **Additional maternity leave (AML)**

If you qualify for ordinary maternity leave you will also qualify for AML. This is a further 26-week period that starts the day after your OML ends.

## **Compulsory maternity leave**

Legislation prohibits you from returning to work during the two-week period (four weeks if you work in a factory) immediately after the birth of your child.

# Employee Handbook

## **When does your maternity leave start?**

You can choose to start your maternity leave at any time after the start of the 11th week before the week in which your child is due, up until the birth of your child. The only exception to this is if you are absent from work wholly or partly because of your pregnancy at any time after the start of the fourth week before your child is due. In this case CSRM reserves the right to require you to start your maternity leave on the first day after your absence.

If you have properly notified CSRM of the date on which you wish to start your maternity leave, you may vary that date provided you notify in writing of the variation at least 28 days before the new date.

## **Notification requirements**

No later than the end of the 15th week before the Expected Week of Childbirth (EWC) you must give notice in writing. That notice must state:

- that you are pregnant
- the week in which your child is due (note that for these purposes a week begins on a Sunday)
- whether you intend to take ordinary maternity leave and/or additional maternity leave
- when you want your maternity leave to start; this date cannot be earlier than the 11th week before the EWC.

You should enclose a Form MATB1 signed by your GP or midwife with your letter which confirms the EWC.

As stated above, if you are absent from work wholly or partly because of pregnancy on the first day after the beginning of the fourth week before the EWC, your ordinary maternity leave will start the following day. You do not need to notify us that you intend maternity leave to start, but you will not be entitled to OML unless you have notified the HR Manager as soon as is reasonably practicable that you are absent from work wholly or partly because of pregnancy and the date your absence began. Such notification must be in writing, email communication is acceptable.

Similarly, if you give birth before your ordinary maternity leave has started, your OML period will begin on the day that follows childbirth. Again, in such circumstances you do not need to notify us of the date on which you intend to start ordinary maternity leave, but you are not entitled to OML unless you have notified your HR Manager as soon as is reasonably practicable that you have given birth and the date on which birth occurred. Such notification must be in writing, email communication is acceptable.

If you notify us of your intended start date or that your ordinary maternity leave period has been triggered due to premature absence or premature childbirth, we will notify you, in writing:

- of the date on which your ordinary maternity leave period will end
- of the date your additional maternity leave period will end.

The above notification will be given to you where we have been notified of:

# Employee Handbook

- the intended start date, or that it has been triggered by premature absence or premature childbirth within 28 days from the date in which CSRM received the notification
- a variation, within 28 days of the date on which your ordinary maternity leave period started.

## Stillbirth

The definition of childbirth is the birth of a child either living or dead, after 24 weeks of pregnancy. If you suffer a stillbirth, you have the right to maternity leave.

## Returning from maternity leave

You have the automatic right to come back to work following maternity leave and it is assumed that you will return unless you state otherwise. Although you are not required to give any formal notice of returning to work at the end of your full 52 week leave period it helps us to plan for your return if you contact us in advance to discuss your return.

If you wish to return to work before your maternity leave has ended you must give at least eight weeks' notice of the date on which you intend to return.

An eight-week notice period also applies if you wish to bring your maternity leave to an end early to take shared parental leave.

## Maternity pay

If you have at least 26 weeks' service at the start of the 15th week before your child is born you will normally be entitled to receive statutory maternity pay (SMP) whether or not you intend to return to work.

Maternity pay is payable at two rates for a maximum of 39 weeks. For the first six weeks of absence, you will be paid at the higher rate of 90 per cent of your average earnings. After this time, you will be paid at the lower statutory rate which is in force at the time.

To be entitled to maternity pay, you must give 28 days' notice in writing of your absence on maternity grounds (as above). If you intend to take maternity leave you need only give the written notice as referred to above.

Your maternity pay will be paid into your bank account on the same date that you would have received your salary and will be subject to the usual deductions for tax, National Insurance and pension contributions.

If you do not qualify for maternity pay you may be able to claim state maternity allowance.

## Contractual benefits

You will continue to receive your contractual benefits during your ordinary maternity leave period and your additional maternity leave period (apart from remuneration).

## Holidays

# Employee Handbook

While you are on maternity leave your contractual holiday entitlement continues to accrue. We will discuss arrangements for taking your holiday entitlement with you. This may include arranging for you take holidays immediately before and/or after your maternity leave.

## Health and safety

If you are employed in a position which has been identified as posing a risk to your health or that of your unborn child, you will be notified immediately, and arrangements will be made to eliminate that risk.

For this reason, you are required to notify your HR Manager as soon as you are aware that you are pregnant. Arrangements will then be made to complete a Pregnancy Workers Assessment and if required to alter your working conditions or, if this is not possible, you will be offered a suitable alternative job for the duration of your pregnancy.

If there is no alternative work, we reserve the right to suspend you on full pay until you are no longer at risk.

These alternative arrangements may continue for six months after the birth of your child if you are still considered to be at risk.

## Returning to work

If you return to work immediately after a period of ordinary maternity leave, you will return to work in the same job that you left. If, for health and safety reasons, you were doing a different job while you were pregnant, you may be required to return to that different job for a short time if you are still at risk when you return to work.

If you return to work from a period of additional maternity leave you will be entitled to return to the job in which you were employed before your absence. If that is not reasonably practicable for CSRM, then you will return to another job which is both suitable and appropriate in the circumstances.

Your right to return means that you return on terms and conditions no less favourable than those that would have been applied if you had not been absent and with the same level of seniority, pension rights and other similar rights.

If annual salary reviews occur during your period of absence, you will be notified of your reviewed salary at this time. You will receive your reviewed salary upon your return to work.

If you decide not to return to work, you should notify us of your decision immediately. You must give notice in accordance with the terms of your contract.

If you cannot return to work because you are ill, you should notify your HR Manager, who will advise you how much, if any, sick leave you are entitled to.

## Keeping in touch days

You are entitled to work for up to 10 days during your maternity leave without affecting your eligibility to SMP. These days could be for training, or just for “keeping in touch”. You are under no obligation to work these days, and we are under no obligation to offer you these days. We will advise you if the opportunity for any such days arises.



# Employee Handbook



# Employee Handbook

## **Paternity leave**

Every effort is made to support those employees taking paternity leave. This policy sets out the leave that is allowed, and the associated arrangements.

The policy deals firstly with paternity leave, and then with additional paternity leave.

### **Paternity leave following the birth of a child**

You will be eligible for paternity leave and pay if you:

- are the father of the child or the husband or partner of the mother (including same-sex partner)
- have worked for the employer for a minimum of 26 weeks by the 'notification week' (i.e., the end of the 15th week before the expected week of childbirth (EWC)) or, for adoption paternity leave, by the end of the week in which the child's adopter is notified of matching
- have or expect to have responsibility for the upbringing of the child if you are the father or expect to have the main responsibility for the upbringing of the child if you are the mother's husband or partner but not the child's father
- have given the correct notice
- have not taken a period of shared parental leave in respect of the child.

### **Paternity leave following adoption**

You will be eligible for paternity leave and pay on the adoption of a child if you:

- have or expect to have the main responsibility for the child's upbringing
- are either married to or the partner of the child's adopter
- have worked continuously for CSRM for 26 weeks ending with the week in which the child's adopter is notified of having been matched with the child
- have given the correct notice and complied with any requirements to produce evidence
- have not taken a period of shared parental leave in respect of the child.

### **Length of paternity leave**

You can choose to take either one week or two consecutive weeks' paternity leave (not occasional days or separate weeks) and you can choose to start your leave:

- from the date of the child's birth or adoption (whether this is earlier or later than expected) or
- on a chosen day after the date of the child's birth or adoption (whether this is earlier or later than expected) or
- (In the case of birth) from a chosen date which is later than the first day of the EWC or
- (In the case of adoption) on a predetermined date that is later than the date on which the child is expected to be placed with the adopter.

# Employee Handbook

If the child is born before the EWC, paternity leave must be taken:

- within 56 days of that date or
- within 56 days of the actual date of birth of the child. Only one period of leave will be available to you even if more than one child is born as the result of the same pregnancy, or you adopt more than one child.

## **Pay**

During your paternity leave you may be entitled to statutory paternity pay (SPP) from CSRM. SPP will be at the rate which is in force at the time.

In this paragraph, relevant period means:

- In birth cases, the eight-week period ending immediately before the 14th week before the EWC.
- In adoption cases, the eight-week period ending immediately before the week in which you or your spouse, civil partner or partner were notified of being matched with the child.

If you take Ordinary Paternity Leave (OPL) in accordance with this policy, you will be entitled to ordinary statutory paternity pay ("OSPP") if, during the relevant period, your average weekly earnings are not less than the lower earnings limit set by the government.

OSPP is paid at a prescribed rate which is set by the government for the relevant tax year, or at 90 per cent of your average weekly earnings calculated over the relevant period if this is lower.

## **Paternity leave following the birth of a child**

You are required to inform us of your intention to take paternity leave in or before the 15th week before the EWC, unless this is not reasonably practicable. You will need to inform your HR Manager in writing of:

- the week the baby is expected
- whether you wish to take one- or two-weeks' leave
- when you want the leave to start.

You must inform us, in writing, as soon as is reasonably practicable after the child's birth, of the date on which the child was born.

If you have given notice of your intention to take paternity leave and wish to change the date that your paternity leave begins, you must give written notice 28 days before the new period of leave is due to start.

## **Paternity leave following the adoption of a child**

You must inform us of your intention to take paternity leave no more than seven days after the date on which the adopter is notified of having been matched with the child. If that is not reasonably practicable, you must notify us as soon as possible. You will need to specify:

# Employee Handbook

- the date on which the adopter was notified of having been matched with the child
- the date on which the child is expected to be placed with the adopter
- whether you wish to take one- or two-weeks' leave
- when you want the leave to start.

## **Contractual benefits**

You are entitled to your normal terms and conditions of employment, except for terms relating to wages or salary (unless the contract of employment provides otherwise) throughout your paternity leave. You may however be entitled to SPP for this period.

You will continue to remain bound by any obligations arising under your contract of employment.

## **Return to work after paternity leave**

You are entitled to return to the same job following no more than two weeks' paternity leave.

If, however, you take two or more consecutive periods of statutory leave (which could include additional paternity/adoption of more than four weeks), you will be entitled to return to the job in which you were employed before your absence. If that is not reasonably practicable for CSRM, then you are entitled to return to another job which is both suitable and appropriate in the circumstances.

You have the right to return:

- with your seniority, pension rights and similar rights
- on terms and conditions not less favourable than those which would have applied if you had not been absent.

You will not be subject to any detriment by CSRM because you took or sought to take paternity leave.

## **Additional paternity leave (APL)**

Additional paternity leave may be available in respect of a baby due to be born (or a child placed for adoption) before 5th April 2015. To qualify for APL, you must be the father of the baby, or be married to or the common law partner of the mother or adopter of the baby, or expect to have responsibility for the child. This includes same sex partners. You must give eight weeks' notice of your intention to take APL.

In addition, to qualify for APL you (in the case of birth) must have worked for CSRM for at least 26 continuous weeks by the 14th week before the baby is due and still be employed by the employer in the week before APL is due to start. Or, (in the case of adoption), you must have worked for the employer for at least 26 continuous weeks by the week in which the couple are notified that they are being matched with a child, and still be in employment with the employer in the week before APL is due to start.

APL can be taken once your partner has returned to work from a period of statutory maternity or statutory adoption leave. APL must be for a minimum of two weeks, and a maximum of 26 weeks. It must not start until 20 weeks have passed since the birth or placement of the child. It must not end later than 12 months after the birth/placement. APL must be taken in multiples of complete weeks. If your partner has not taken his/her full entitlement to statutory maternity or statutory adoption pay this will transfer to you.

# Employee Handbook

If you wish to take APL you must inform your HR Manager. You will be required to complete self-certification forms to confirm your entitlement to take the leave. CSRM has the right to check the accuracy of any information that is supplied.

If you take APL in accordance with this policy, you may be entitled to additional statutory paternity pay ("ASPP"). Whether and, if so, for how long you may be entitled to ASPP will depend on:

- Your average weekly earnings being not less than the lower earnings limit set by the government during the relevant period; and
- The child's mother or your co-adopter, as the case may be, having returned to work without having taken at least two weeks of their maternity allowance, maternity pay or adoption pay period. Your entitlement to ASPP will equate to the balance of the number of weeks of your partner's maternity allowance, maternity pay or adoption pay period that remain when you commence APL. Your partner's pay period continues to run even if there is a gap between your partner returning to work and you commencing APL.

ASPP is paid at a prescribed rate which is set by the government for the relevant tax year, or at 90 per cent of your average weekly earnings calculated over the relevant period if this is lower.

You should discuss your particular circumstances with your local social security office (Department for Work and Pensions) as you may be eligible for further financial support, such as housing benefit, council tax benefit, tax credits or a Sure Start Maternity Grant.

All of the terms and conditions of your employment remain in force during APL, except for the terms relating to pay. In particular:

- Benefits in kind such as life insurance, health insurance, and use of a vehicle if applicable shall continue;
- Annual leave entitlement under your contract shall continue to accrue; and
- Pension benefits shall continue.

You may work (including attending training) for up to 10 days during APL without bringing your paternity leave or your ASPP to an end. The arrangements, including pay, would be set by agreement with your manager. You are not obliged to undertake any such work during APL.

Shortly before you are due to return to work, your manager may invite you to have a discussion (whether in person or by telephone) about the arrangements on your return.

You are normally entitled to return to work following either OPL or APL to the same position you held before commencing leave. Your terms of employment will be the same as they would have been had you not been absent.

However, if you have combined your OPL or APL with a period of:

- additional adoption leave; or
- parental leave of more than four weeks,

and it is not reasonably practicable for you to return to the same job, the company will offer you a suitable and appropriate alternative position.

# Employee Handbook

If you wish to postpone your return from APL, you should either:

- Request unpaid parental leave in accordance with the company's Parental Leave Policy, giving us as much notice as possible but not less than 21 days; or
- Request paid annual leave in accordance with your contract of employment, which will be at the company's discretion.

If you are unable to return to work from APL as expected due to sickness or injury, this will be treated as sickness absence and the company's Sickness Absence Policy will apply.

In any other case, a late return will be treated as unauthorised absence in accordance with the company's unauthorised absence policy.

The company will deal with any requests by employees to change their working patterns (such as working part-time) after paternity leave on a case-by-case basis, in accordance with the company's Flexible Working Policy. Your HR Manager will try to accommodate your wishes unless there is a justifiable reason for refusal, bearing in mind the needs of the business. It is helpful if requests are made as early as possible.

If you do not intend to return to work or are unsure, it is helpful if you discuss this with us as early as possible. If you decide not to return you should submit your resignation in accordance with your contract of employment. Once you have done so you will be unable to change your mind without our agreement. This does not affect your right to receive SPP.

# Employee Handbook

## Adoption Leave

Every effort is made to support employees who are engaged in the process of adopting a child. This policy sets out the procedures that should be followed to ensure a smooth handover at the start and end of adoption leave.

As soon as practicable after the notification that you will be adopting a child, arrangements will be made for you to meet with your HR Manager. This will be an informal interview, the purpose of which is to confirm that:

- your right to ordinary and additional adoption leave is understood, including the requirements to give appropriate notice
- the right to return is explained, together with any potential opportunities for flexible working arrangements
- arrangements for time off are known, and any possible health and safety concerns are discussed
- you know your entitlements to payment during adoption leave.

We recognise that orderly arrangements for cover during the period of adoption leave, and also for enabling you to keep in touch with any developments at work are important for ensuring smooth transitions at each stage. Before the start of adoption leave, you will be informed of the arrangements for covering your work and also for remaining in contact whilst you are on leave.

These arrangements will be finalised in consultation with you as far as possible.

As you have a right to return to work in your old job, we will seek to avoid placing you into a position of potential redundancy whilst on adoption leave. In accordance with statutory requirements, where job losses are unavoidable you will be given first consideration for any suitable alternative employment that may arise.

At least two weeks before you are due to return to work, you will be invited for an informal meeting with your manager. This is in order to discuss any material points concerning your return to work. These include:

- updating you on developments at work
- considering whether any retraining needs have arisen because of staleness or new technical or other developments. It is our aim to ensure that your adoption leave does not put you at a disadvantage in relation to skills or other training needs
- confirming the details of any agreed flexible working arrangements
- providing you with an opportunity to discuss and explain any necessary and unavoidable changes to your work.

### **The right to adoption leave**

Adoption leave and pay will be available to:

- employees who adopt
- one member of a couple where the couple adopt jointly. In this case, the couple may choose which partner takes adoption leave. The partner who doesn't take the adoption leave may be entitled to paternity leave and pay.

# Employee Handbook

## **Qualification**

To qualify for adoption leave you must:

- be newly matched with a child for adoption by an approved adoption agency (this right will not therefore apply to step-parents adopting a step-child); or
- (In the case of surrogacy adoption leave) be in receipt of, or in the process of applying for, a parental order.

The definition of 'matched for adoption' includes placement of a child with local authority foster parents who are prospective adopters under the fostering for adoption scheme.

## **Time off for adoption appointments**

Employees who intend to adopt a child are entitled to time off to attend adoption appointments. Adoption appointments refer to those which take place after the employee is notified that a child is to be placed with him or her for adoption (or for a fostering for adoption placement) and before the placement occurs. The amount of time off (and entitlement to pay) depends on whether the employee has elected to be the main adopter or is the partner of the main adopter. No request for time off will be unreasonably refused.

### **Entitlement to time off – main adopter**

The main adopter is entitled to time off to attend adoption appointments on up to five occasions. The maximum time off which can be taken on each occasion is six and a half hours. Time off will be paid at the employee's normal rate of pay.

### **Entitlement to time off – partner**

The partner of the main adopter is entitled to time off to attend up to two adoption appointments. The maximum amount of time off which can be taken on each occasion is six and a half hours. Time off is unpaid.

## **Length of leave**

You are entitled to up to 26 weeks' ordinary adoption leave (OAL) followed immediately by up to 26 weeks' additional adoption leave (AAL). This gives you a maximum of 52 weeks' leave in total. Only one period of leave is available even if you are adopting more than one child.

## **When can adoption leave start?**

Adoption leave can start:

- from the date of the child's placement (whether this is earlier or later than expected) or
- from a fixed date which can be up to 14 days before the expected date of placement.

# Employee Handbook

## **Adoption pay**

From 5th April 2015 statutory adoption pay amounts to 90 per cent of average weekly earnings for six weeks followed by 33 weeks at the fixed statutory rate (or 90 per cent of average weekly earnings if that is lower).

## **Notification**

You are required to inform your HR Manager in writing of your intention to take adoption leave within seven days of being notified that you have been matched with a child for adoption, unless this is not reasonably practicable. You will need to state:

- when the child is expected to be placed with you and
- when you want your adoption leave to start.

You will also have to provide us with a 'matching certificate' from the adoption agency.

You can change your mind about the date you want to start your adoption leave, but will have to inform your HR Manager at least 28 days in advance, unless this is not reasonably practicable.

We will write to you within 28 days of receiving your notice, setting out the date on which we expect you to return to work if the full entitlement to adoption leave is taken.

## **Contractual benefits**

You will continue to receive your contractual benefits during your ordinary adoption leave period and your additional adoption leave period (apart from remuneration).

## **Holidays**

While you are on adoption leave your contractual holiday entitlement continues to accrue. Your manager will discuss arrangements for taking your holiday entitlement with you. This may include arranging for you take holidays immediately before and/or after your adoption leave.

## **Returning to work**

You have the right to return:

- with your seniority, pension rights and similar rights
- on terms and conditions no less favourable than those which would have applied if you had not been absent.

You will not be subject to any detriment by CSRM because you took or sought to take adoption leave.





# Employee Handbook

If you wish to return to work before the end of your adoption leave period, you must give at least eight weeks' advance notice in writing. An eight-week notice period also applies if you wish to bring your adoption leave to an end early in order to take shared parental leave.

## **Keeping in touch days**

You are entitled to work for up to 10 days during your adoption leave without affecting your eligibility to SAP. These days could be for training or just for "Keeping in Touch" (KIT days). You are under no obligation to work these days, and we are under no obligation to provide these days. We will contact you if the opportunity for any such days arises.

# Employee Handbook

## Shared Parental Leave

This policy outlines the statutory right to take shared parental leave (SPL) to care for a child due to be born or placed for adoption on or after 5 April 2015. It also outlines the arrangements and notification requirements before a period of SPL and the entitlement to pay during SPL.

SPL gives employees with caring responsibilities for babies or newly adopted children the opportunity to share up to 52 weeks' leave should they wish to do so. Parents taking SPL can take leave in separate blocks, returning to work in between blocks, and can be on leave at the same time. Eligible employees are entitled to submit up to three 'period of leave' notices and are entitled to take SPL on those dates if a continuous period of leave is requested.

Employees and the HR Manager should, where possible, have an informal discussion prior to employees giving formal notification of intention to take SPL so that statutory entitlements to other types of leave and pay can be discussed, and to ensure that plans for any discontinuous periods of leave can be considered as early as possible.

Requests for SPL which are not made in accordance with the statutory notification requirements will be given reasonable consideration, but may not be granted.

### Entitlement, Amount and Timing of SPL

Please refer to the Government website for [Shared Parental Leave and Pay: Eligibility for birth parents - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/topics/shared-parental-leave)

### Notice of entitlement and intention to take SPL and ShPP

You must notify CSRM in writing at least eight weeks before the start date of the first period of SPL. The written notice must contain the following information:

- Your name and the other parent's name
- The start and end dates of the mother's or main adopter's maternity/adoption leave (or the start and end dates of the statutory maternity/adoption pay or maternity allowance period if the mother/main adopter is not entitled to statutory leave)
- The expected date of birth/placement and the actual date of birth/placement if the written notice is given after the birth/placement
- The amount of SPL and ShPP available and an indication of how much each parent intends to take (this may be varied by a subsequent written notice signed by both parents)
- An indication of the start and end dates of the periods of SPL and ShPP that you intend to take. This indication is not binding and can be amended at a later date.
- A declaration that you meet the conditions for entitlement to SPL, the information provided is accurate and that you will notify CSRM immediately if you cease to meet the conditions for entitlement.
- A declaration from the other parent containing his or her name, address and National Insurance number, confirmation that s/he meets the employment and earnings conditions, consents to the amount of leave the

# Employee Handbook

employee intends to take and will immediately inform you if s/he ceases to satisfy the employment and earnings conditions.

## **Notice of curtailment of statutory maternity/adoption leave and payments**

At the same time that a notice of entitlement and intention to take SPL is submitted, the mother/main adopter must give his or her employer a leave and pay curtailment notice giving eight weeks' notice of the date on which maternity/adoption leave and pay is to end (or the date on which maternity/adoption pay is to end if s/he is not entitled to maternity/adoption leave). If the mother is only entitled to maternity allowance (and not maternity leave) her notice of curtailment must be submitted to Jobcentre Plus. Her maternity allowance cannot be reinstated, so she is in effect giving consent for her partner to take the whole of any ShPP entitlement.

Notice of curtailment is usually binding, but may be revoked in the following circumstances:

- it becomes apparent that neither parent is entitled to SPL or ShPP
- if the curtailment notice was given before the birth and is revoked within six weeks of the birth (in this case another curtailment notice can be submitted)
- if the other parent dies.

## **Notice to take a specific period of SPL and ShPP**

In practice, at least the first period of SPL will be identified in the initial notice of entitlement and intention to take SPL. You are entitled to submit a maximum of a further two 'period of leave' notices. Each notice must be given at least eight weeks before the start of a period of leave, stating the dates of the leave and the dates on which ShPP will be claimed, if applicable.

If the first 'period of leave' notice is given prior to the birth of a child, the notice may express the start date in relation to the date of birth, for example 'starting two weeks after the baby is born for a period of four weeks.'

## **Confirmation of SPL and ShPP**

If a continuous period of leave is requested in each period of leave notice, you will be entitled to take that period of leave and this will be confirmed in writing.

If more than one period of leave is requested in a period of leave notice, your HR Manager will seek to accommodate the request but this cannot be guaranteed. They will discuss the request with you and your manager to determine if it can be accommodated. If it cannot be accommodated, there may be an alternative pattern of leave which can be agreed, or the request may be refused. The decision will be confirmed in writing.

If no agreement is reached within two weeks of the period of leave notice being submitted you can:

- take the discontinuous periods of leave requested in one continuous block, beginning on the original start date
- take the continuous block starting on a new date, as long as the new date is later than the original start date, and you notify CSRM of the new date within five days of the two-week period referred to above
- withdraw the request at any time up to the 15th day after it was originally made. If the request is withdrawn in these circumstances, it will not count as one of your three requests.

# Employee Handbook

## Varying a period of leave

You are entitled to submit a request to vary a period of leave in the following ways:

- vary the start or end date as long as the variation is requested at least eight weeks before the original start date and the new start date
- vary or cancel the amount of leave requested at least eight weeks before the original start date
- request that a single period of leave become a discontinuous period of leave, or vice versa.

A variation will count as one of your three periods of leave notices unless:

- it is made as a result of the child being born earlier or later than the expected week of childbirth
- the has requested the variation
- the company has agreed to accept more than three period of leave notices.

The usual eight-week notice requirement may be modified if your child is born early and the new start date for the period of leave is the same length of time following the birth as in the original notice. In this case notice to vary the start date should be given as soon as reasonably practicable after the birth of the child.

## Evidence requirements

CSRM may request a copy of the child's birth certificate and the name and address of the other parent's employer.

In the case of adoption, CSRM may request the name and address of the other parent's employer, along with evidence confirming the following:

- the name and address of the adoption agency
- the date that the main adopter was notified of having been matched for adoption with the child
- the date on which the adoption agency expects to place the child.

Any such request will be made by CSRM within 14 days of receiving your notice of entitlement and intention to take SPL and ShPP. You must respond to the request for evidence within 14 days (or within 14 days of the birth of the child if our request was made before the child was born).

If a birth certificate has not yet been issued, you must sign a declaration stating that fact along with the date and location of the child's birth. If the other parent has no employer, this must also be declared.

## Keeping in touch during SPL – 'SPLIT' days

You may be asked to attend work on occasional days during your SPL period. These days could be for training, to attend department meetings, or just for keeping in touch. These days are referred to as SPLIT (Shared Parental Leave 'in touch') days. You may work for up to 20 SPLIT days without bringing the SPL to an end, but work during SPL will not have the effect of extending your SPL period. If you do work, you will be paid your normal rate of pay inclusive of any ShPP entitlement. You are under no obligation to work during SPL, and CSRM is under no obligation to offer work.

# Employee Handbook

The 20 SPLIT days available during SPL are in addition to the 10 KIT (keeping in touch) days available during maternity and adoption leave.

## Contractual benefits

You will continue to receive your usual contractual benefits during your SPL period (apart from remuneration).

## Holidays

While you are on SPL your contractual holiday entitlement continues to accrue. Your manager will discuss appropriate arrangements for taking your holiday entitlement with you before your SPL starts.

## Returning from SPL

If you wish to return early from SPL, or extend the period of your SPL, you must notify CSRM at least eight weeks' before both the original end date and the new end date.

If you return to work immediately after a period of SPL which (together with any statutory maternity/adoption leave you may have taken to care for the same child) was 26 weeks or less, you will return to work in the same job that you left.

If you return to work from a period of SPL which (together with any maternity/ adoption leave you may have taken to care for the same child) was 26 weeks or more you will normally be entitled to return to the job in which you were employed before your absence. If that is not reasonably practicable for CSRM, then you will return to another job which is both suitable and appropriate in the circumstances.

Your right to return means that you return on terms and conditions no less favourable than those that would have been applied if you had not been absent and with the same level of seniority, pension rights and other similar rights.

## Neonatal Care (Leave and Pay)

### Purpose

This policy outlines the entitlement and process for employees requesting neonatal care leave and pay, ensuring support for parents whose newborns require medical care.

### Eligibility

Employees are eligible for neonatal care leave if:

- Their baby is admitted to neonatal care within 28 days of birth.
- The baby remains in neonatal care for at least 7 consecutive days.
- They have shared or sole responsibility for the child.

Eligible employees include:

Birth parents

- Fathers, spouses, civil partners, or partners of the birth parent
- Adoptive parents, including foster-to-adopt arrangements
- Intended parents in surrogacy arrangements

# Employee Handbook

## Leave Entitlement

- Employees can take up to 12 weeks of neonatal care leave.
- Leave is granted at 1 week per full week the baby is in neonatal care.
- Neonatal care leave can be taken in addition to statutory parental leave.

## Pay Entitlement

Employees may be eligible for neonatal care pay if they:

- Have 26 weeks of continuous service before the relevant week.
- Earn at least £125 per week on average in the 8 weeks before the relevant week.
- Are still employed in the week before the neonatal care pay period.

## Notice Requirements

Employees must notify their employer as follows:

- Tier 1 Leave (while the baby is receiving care): Notify the employer before the first day of leave or as soon as possible.
- Tier 2 Leave (after neonatal care ends):
  - For 1 week of leave, provide 15 days' notice.
  - For 2 or more weeks, provide 28 days' notice.

## Rights During and After Leave

Employees retain their rights to:

- Return to their previous role or an equivalent position.
- Continue accruing annual leave.
- Maintain pension contributions and other contractual benefits.

# Employee Handbook

## Section 5

### Employee Benefits

#### D4 Medical Examination

To work on the Gaydon or Fen End Proving Ground, it is a requirement to complete a D4 Medical. CSRM has now signed up for a business account with D4 Drivers <https://d4drivers.uk>, and all bookings must follow the outlined process below.

#### **Booking Process:**

1. Initiate Request
  - Contact CSRM HR Manager Jackie@csrm.co.uk to advise that you need to complete a D4 Medical, either for a renewal of your Gaydon Track Pass or to obtain one for the first time.
2. Authorisation Approval
  - HR will request authorisation for the medical cost from the JLR Manager.
3. Receive Booking Code
  - Once approval is obtained, HR will provide you with a booking code to schedule your medical appointment with D4 Drivers.
  - You are responsible for making the booking yourself.
4. Medical Appointment & Payment.
  - When attending your D4 Medical, present the booking code to D4 Drivers.
  - D4 Drivers will invoice CSRM directly for the cost of the medical.

#### **Invoice Processing**

- CSRM will process the invoice payment and later reclaim the cost via JLR.

#### **Submission of Medical Form**

- Once your medical has been completed, send a copy of your medical form to Jackie@csrm.co.uk
- Jackie will then forward a copy to Richard Kearney, along with your email address.

#### **Proving Ground Tutorial**

- Richard Kearney will contact you to schedule a Proving Ground Tutorial, which is required for access.

#### Specsavers Eyecare Scheme

CSRM offer free eyecare with Specsavers to staff who meet certain criteria.

To qualify for an eyecare voucher, you must regularly use DSE (display screen equipment) as a significant part of your normal work (daily, for continuous periods of an hour or more).

The DSE regulations do not apply to workers who use DSE infrequently or for short periods of time. Employees are entitled to one voucher per year.

The Specsavers scheme will provide you with a DSE eyecare e-voucher which covers: -

- Full eye test *Up to the value of £25*

# Employee Handbook

- **£50 standard single-vision glasses(or £50 contribution towards a higher value).** *When the prescription in the glasses is required specifically and solely for VDU use. (It does not give a contribution to glasses needed for additional tasks, such as reading or driving.)*
- **£20 Premium Club discount.** When purchasing a frame from the £100 range or above. **2for1** When purchasing a qualifying frame

For more information or to request a voucher, please contact the payroll department

## NEST Pension

You will be automatically enrolled into the NEST Pension Scheme; a letter will be issued to you to advise you of the scheme on your employment with CSRM

If you need to contact NEST for more information then please visit the NEST website <http://www.nestpensions.org.uk> or contact NEST on 0300 020 0090,

## Expenses and Mileage Claims

This process has been revised to streamline the Expenses process, to make the process easier and to avoid delays in payment

### Process; -

- Please email all expense and mileage claims to [expenses@csrm.co.uk](mailto:expenses@csrm.co.uk)
- Please add the date that the claim was emailed to CSRM on the bottom of the claim form, in the clearly labelled box ("Date Emailed")
- Any expenses posted or handed to CSRM that have not been emailed, will not be paid
- Relevant managers will need to sign the form (BEFORE they are emailed) either by digital signature or by signing the original form that will then need to be scanned in or a clear photo emailed of the signed claim
- For any expenses (as opposed to mileage claims), proof of amount paid e.g., receipts, booking confirmations etc, will need to be added to the email with the claim. Staff must ensure that receipts don't cover the claim form if scanned or photo sent, as it blocks certain information needed for processing
- The original receipts will then need to be handed to CSRM or left in the pigeon holes at the venue, to be collected. Please refrain from posting documentation to us. Please ensure receipts are clearly labelled with names, dates and total amount from the form they relate to
- Records will be kept of any original receipts received. If we receive numerous claims in a row with no original / valid supporting documentation, action will need to be taken before further claims are processed and paid
- In EXCEPTIONAL CIRCUMSTANCES, any documentation needed to be posted should be sent to the usual C/O Nelson's Wharf, Rugby Road, Stockton, Warwickshire CV47 8AA correspondence address and **only** this address. However, it will still need to be emailed to [expenses@csrm.co.uk](mailto:expenses@csrm.co.uk) beforehand and agreed with the CSRM team as a posted item before completed.

## **BUSINESS MILEAGE**

Mileage rates will be calculated automatically based on the vehicle in your profile. The business mileage rates are shown below.



## Employee Handbook

	Engine Size (cc)	Management Vehicle (Pence per mile)	Employee-owned Vehicle (Pence per mile)
PETROL CAR	1400 or less	23	29
	1401-2000	29	37
	2001 or more	31	41
DIESEL CAR	1400 or less	19	28
	1401-2000	26	31
	2001 or more	28	35
ELECTRIC VEHICLE	E-CCP	10	-
	I-PACE Ignition	10	-
	Other Electric Vehicle	13	18
MOTORCYCLE	250 or less	15	
	251 or more	20	

You can only claim mileage against one vehicle in a single claim. If you need to claim business mileage for a second vehicle create a new claim form.

Mileage rates will be calculated automatically based on the vehicle in your profile. The business mileage rates can be found by contacted Payroll.

To help you calculate your business mileage a mileage chart is available. If your journey starts or ends at home, in line with the JLR UK Travel and Expense Standard you will then need to deduct your home to work mileage from your claim form.

You can also claim car parking costs, congestion charge and toll fees. They must be needed for your business journey, not your journey from somewhere you need to go for JLR work reasons to your home or anywhere else you go for reasons other than JLR work. Remember to get a receipt whenever you can.

### Tax rebates on business mileage

If your business mileage is done in a privately-owned vehicle (which includes JLR management car scheme cars) an additional tax rebate is available from Her Majesty's Revenue and Customs (HMRC) on the difference between the reimbursement rate per mile provided by JLR and HMRC's approved Mileage Allowance Payment which is 45p per mile for the first 10,000 miles, then 25p per mile.

For example, suppose you drive 8,000 business miles in a year and are reimbursed by JLR at 18p per mile. This is 27p per mile less than HMRC's approved amount of 45p per mile so you can claim tax relief of 20% on  $27p \times 8,000$  which is £432.

To claim the rebate, submit either a self-assessment tax return or a simplified expense form P87 to HMRC.



# Employee Handbook

## Section 6

### Leaving CSRm

#### **Resignations and notice**

Your notice period is as outlined in your individual terms and conditions of employment. All resignations by employees must be supplied in writing, stating your reason for resignation.

#### **Exit Interviews**

Arrangements will be made to arrange an Exit interview meeting. During the meeting you will be asked a number of questions regarding your employment with CSRm. A copy of the questionnaire will be issued to our customer for information only. The information gained from the Exit interviews assists CSRm in making any required improvements.

#### **Terminating employment without giving notice**

If you terminate your employment without giving or working the required period of notice, as indicated in your individual statement of main terms of employment, you will have an amount equal to any additional cost of covering your duties during the notice period not worked deducted from any termination pay due to you.

You will also forfeit any contractual accrued holiday pay due to you over and above your statutory holiday pay, if you fail to give or work the required period of notice.

#### **Repayment of outstanding monies**

On the termination of your employment, we have the right to deduct from any termination pay due to you any advances of wages or any loans which we may have made to you.

#### **Return of our property**

On the termination of your employment, you must return all JLRE property which is in your possession or for which you have responsibility. Failure to return such items may result in the cost of the items being deducted from any monies outstanding to you.

#### **Garden Leave**

If either you or the company serves notice on the other to terminate your employment the company may require you to take "garden leave" for all or part of the remaining period of your employment.

#### **Leaver's Data**

On the termination of your employment with CSRm we will destroy all personal records and data held about you, other than the data we are required to keep by law, six months after your last day worked as outlined on your P45.



# Employee Handbook

The policies and procedures found in this handbook are to ensure you have a safe and fair working environment. These policies and procedures may change in line with legislation and improved procedure and will be notified of any amendments or additions to this document accordingly.

We look forward to working with you and seeing your progression within the company.

Thank you for taking the time to read your Employee Handbook, if you have any questions or require any further information then please contact your HR Manager Jackie Hensher, who will be happy to assist you.

Thank you.

Kind regards,

Jackie



# Employee Handbook

## Receipt and Acceptance – Employee Handbook

My signature below indicates that I have received a copy of the Company's Employee Handbook.

I understand that this manual contains information regarding the Company's rules, regulations and benefits which affect me as an employee.

I acknowledge that I have read and understood Company policies.

I also understand that the Company may revise, supplement or rescind policies, procedures or benefits described in the manual, with or without notice.

Print Name \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_



# Employee Handbook

## Appendix 1 - Working Time Regulations 1998 – OPT OUT FORM

Under the regulations I am entitled not to work for more than an average of 48 hours per week.

In completing this form, I am choosing to opt out of the 48-hour working limit. Please note that rest periods and breaks still apply.

### **Agreement**

I ..... hereby give you notice that I am willing to work, more than an average of 48 hours a week.

In opting out of the 48-hour limit, I agree that I will not work excessively long hours where this may be a risk to the health and safety of my colleagues, the public or myself.

This agreement is to remain effective for an indefinite period and I understand that should I wish to terminate this agreement; I can do so at any time by providing my manager with written notice of my intention to do so.

Signed: .....

Department: .....

Date:.....

Please return to CSRM HR Manager, who will keep a copy of this form on your personal file.

# Employee Handbook

## Appendix 2 - Training agreement

This contract is between

**Name of employee;**

**And**

**Name of employer; -** CSRM Outsourcing Ltd

CSRM agrees to support your completion of the following course; -

**Course title;**

**Start Date;**

**Expected duration of the course;**

CSRM will provide funding of £ to complete the above course, paid directly to your training provider.

### Terms and conditions

CSRM will fund the training, in return we require you to meet the following conditions;

1. I understand that I am responsible for any additional cost relating to the course such as travel and materials.
2. I agree to commit the required time and effort required to complete the above course and meet the responsibilities outlined by the training provider.
3. I agree to work at CSRM/Jaguar Land Rover Experience as per the terms of my employment contract.
4. To the best of my ability, I will continue to work at CSRM/Jaguar Land Rover Experience for three years after the completion of the above course.
5. I will give a copy of my certificate to CSRM on completion of the above course.
6. Should I not complete the above course or be able to meet any of the above conditions. I will inform CSRM in writing immediately and understand that I may be required to pay back the amount awarded.

Signed (employee):

Printed name (employee):

Date:

Signed on behalf of CSRM:

Printed name:

Date:



# Employee Handbook