**5. Travel Policy & Hierarchy**

**A travel policy is based on the sustainability travel hierarchy and sets out processes for staff attending meetings using transport.**

**The overall aim of a travel policy is to reduce carbon dioxide emissions, NOx and particulate emissions, as well as reduce congestion, risk and costs.**

The example policy below is highly specific to a single organisation. However, it is a template and demonstrates what can be included. It is intended as an example only.

Please note that a template for Journey Assessment Tool mentioned through the Travel Policy is not provided as part of this toolkit.

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TRAVEL POLICY TEMPLATE

On a cover page, you may want to include:

* Date of production
* Author
* ‘Agreed by’ with their signatures, positions, date of signing

# Introduction

*[The introduction is opportunity to briefly outline the expected benefits of any changes that have been implemented, aims/targets and company achievements to date.]*

The policy relates to business travel only. Commuting falls outside of the scope of this policy.

However, it should be understood that home to place of business (A) is classed as ‘commute’ until the distance from home to usual place of work (B) is exceeded.

Business mileage (D) in this instance can be set out as:  
D (Miles claimable) = A (Home to business destination) – B (normal commute)

There may be exceptions to this where ‘home’ is classified as the employee’s normal place of work.

# Sustainable Travel Hierarchy

*[It is recommended that a sustainable travel hierarchy is adopted where travel to workplaces is**required and necessary (and home working or virtual alternatives cannot be implemented. Organisations that adopt shared desks and genuinely flexible working will see significant savings.]*

Making no journey provides the best financial and environmental savings, however sometimes a meeting, discussion, networking or activity needs to take place in some shape or form and cannot be simply neglected. The Sustainable Travel Hierarchy helps employees select the most suitable mode of transport.

Before embarking on any journey, it is the responsibility of all employees and their line managers to ensure the most cost-effective means of travel and where applicable, appropriate accommodation is used. *[For some organisations, ‘cost effective’ may be replaced with such terms as ‘sustainable’ or ‘carbon efficient’].*

This policy applies to all officers of the [organisation]. It does (or may) not apply to the Council’s elected members who have different work patterns and are paid substantively less than previous HMRC officer rates. *[Remove where not Local Authority].*

**Decision flowchart**

For the majority of travel decisions, the travel hierarchy below should provide a useful tool for deciding the best way to undertake the trip. *[Certain values and times will be dependent on the policy adopted by your organisation and so should be altered as needed].*

Book a Daily Rental vehicle

Do you have more than 2 business hours available before you need to leave?

Is it convenient to walk, cycle or use public transport?

Check pool car availability

Arrange video or teleconference

Is the total travel period <8 hours including meeting time or <75 business miles?

Book a pool car

Cycle or walk or use public transport

**Meeting or perceived business travel need**

Is there a practical alternative to travel, such a conference call?

Willing to use your own car at £0.15/mile and currently insured for business use?

Is the total period you require to travel **>**8 hours including meeting time or **>**75 business miles?

Complete the Journey Assessment tool

Use public transport, taxi or reschedule

Share the journey with a colleague

# Journey Assessment

A travel journey must have a business purpose. Before undertaking any journey, consider if it is necessary.

* Can this purpose be satisfied by other means, i.e: Video/audio conferencing, telephone, e-mail?
* Before a journey is undertaken by car consider if alternative means of travel (bus, rail, walk or cycle) are feasible?
* Can the venue and/or date be changed to coincide with other travel requirements?
* Are shared travel arrangements an option?
* Where the journey is essential, has it been approved by the line manager?

# Vehicles in Use

Vehicles used for business travel will fall into the following categories:

* CarShare (Pool) Fleet - For business use only
* Private (grey fleet) - Vehicles owned by employees
* Daily Rental - Vehicles hired as required. To be used when journey exceeds either 75 miles or 8 hours [Adapt as necessary].
* Lease - Vehicles provided to qualifying employees for both business and private use (see Contract). [Employee must meet criteria: specific occupation and minimum annual mileage to be eligible].

# CarShare (Pool) Fleet

Drivers of CarShare (Pool) Vehicles will access cars through the [External Vehicle Provider’s] website. Car entry is through RFID card. Refuelling will be carried out when ¼ tank at nominated petrol stations using fuel card in glove compartment or placed on charge with Electric Rapid Chargers after each use (charge card in glove compartment).

# Private (Grey Fleet) Vehicles

Because [organisation] has provided a fleet for travel, employees that elect to use their own car will only be reimbursed for fuel at the following HMRC rates which apply from 1 March 2018[[1]](#footnote-1).

Mileage claims submitted through the [organisation’s] electronic booking system must use the unique code provided electronically to their e-mail inbox when a Journey Assessment has been completed. This requires drivers to confirm on the day of travel that vehicle and driver are fit to drive and business insurance, valid license and MOT (where required) are in place.

Mileage claims are calculated by deducting the standard home to work mileage (and return as appropriate) from any journey that does not start from, or finish at, a business workplace.

|  |  |  |
| --- | --- | --- |
| **Engine size** | **Petrol - amount per mile** | **LPG - amount per mile** |
| 1400cc or less | 11 pence | 7 pence |
| 1401cc to 2000cc | 14 pence | 8 pence |
| Over 2000cc | 22 pence | 13 pence |
|  | | |
| **Engine size** | **Diesel - amount per mile** |  |
| 1600cc or less | 9 pence |  |
| 1601cc to 2000cc | 11 pence |
| Over 2000cc | 12 pence |  |
| Hybrid cars are treated as either petrol or diesel cars for this purpose. | | |

# Daily Hire

After following the travel hierarchy, employees may elect to use a daily hire car when they meet the following criteria:

* If travelling more than **75** miles **or**
* If vehicle is to be in use for more than **8** hours.

*[N.B. Distance and time should be agreed upon by the organisation following assessments of fleet and costs.]*

Any rental above grade A or B must be authorised by the officer’s line manager. If this is not electronically signed-off within **6** hours, the sanction is removed and the line manager is then alerted to address this after the event. Line managers found not addressing issues with staff will be referred to relevant Director.

# Lease Vehicles

Staff who are authorised for a Lease Vehicle will be entitled to use this for both business and personal travel. Staff and spouse will be insured for personal use. For further information, please refer to the individual Car Contracts.

# Electric and Low Carbon Fleet

All of the Car Share cars are under [X]g/km CO2 and *[X]* of these are pure electric. The Lease vehicles are all sub [**X**]g/km CO2 and have a minimum combined MPG of [***number]***.

Two of these cars are Electric Range extenders with one petrol hybrid. The Organisation’s Parking Services car is also pure electric.

*[The above CO2 g/km and other figures should be agreed by the organisation considering its environmental impact and how it wishes its reputation to be viewed and as a local business leader and employer.]*

# Exceptional Circumstances

For instances where there are extenuating circumstances which mean that the above options and stages cannot be followed, payments of up to £0.45/mile (or HMRC rate, whichever is the lower) will be made for private (grey fleet) car use where:

* Emergency Plan has been invoked
* Officer has been called out by a line manager out of normal business hours
* Claimants are Contractors or Consultants
* Officer is a nominated and on-call Standby Duty Officer.

There are no other circumstances whereby payments beyond HMRC advisory fuel rates are payable.

There may be additional instances or extenuating circumstances where the organisation feels there is merit in relaxing the terms of this policy.

# License, insurance, MOT and document checks

When registering on the CarShare (Pool) scheme, the officer agrees that the external fleet operator will check their licence, MOT and business insurance via HMRC Online.

Where employees elect to use their private (grey fleet) car, they must tick certify that they have:

* Current driving licence
* Current MOT (if over 3 years old)
* Current road tax
* Current insurance including business travel
* No health or addiction issues that may affect their ability to drive
* Fewer than 12 or more license points and no convictions
* Have a vehicle in a roadworthy condition.

On every occasion that an employee uses this vehicle, the Journey Assessment Tool must also be used. Where this is not used, mileage reimbursements will not be made. Where the tool is not used on more than one occasion, the issue will be raised with the employee’s line manager.

# Use of Taxis

The hiring of a taxi should be done in circumstances as set out below. Specifically, where:

* Staff are undertaking a one-way trip (e.g. to the railway station) and leaving a CarShare (Pool) or daily hire car there all day would not be a practical use of this resource.
* The cost of this is less than the cost of a daily hire car (£***number****.00* inc insurance).
* No other suitable mode of transport is available.

*[The figure above (£****number****.00 inc insurance) must be factored based on alternative cost to hire an alternative vehicle solution.]*

Where a taxi is required, and the above parameters are not involved, the line manager’s decision should be sought.

# Air or Overseas Travel

The use of aircraft to travel other than domestically is unusual activity and in all cases, both domestically and internationally, is discouraged on sustainability grounds.

All air and overseas travel arrangements must be authorised in advance by the appropriate [e.g. Director or Assistant Director] using the [e.g. Air and Overseas Travel Request Form].

The expectation is that the officer must be able to demonstrate that (after first addressing all hierarchy items 1 through 10) that travelling by air is both:

1. More time productive than a more sustainable solution

and

1. Less expensive than a more sustainable solution

This Policy has been agreed by senior management and elected members. Any employees found to be deviating from it may face disciplinary action.

# Overnight Accommodation

All planned overnight accommodation must be authorised in advance by the appropriate Director, Assistant Director or Head of Service and booking arrangements must be through your service area Business Support Admin Team who will book using the most cost-effective method.

1. <https://www.gov.uk/government/publications/advisory-fuel-rates/advisory-fuel-rates-from-1-march-2016> [↑](#footnote-ref-1)