**6. Travel Policy [Organisational Template]**

**V1.0**

**Company name:**

**Logo:**

**Image(s):**

**Date or production:**

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**Position: Leader Position: CEO/MD**

**Date of signing: Date of signing:**

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**[Organisational] Travel Policy**

**Introduction**

This Policy is a full and editable template of text designed to demonstrate what can be included. It is intended as an example only.

The draft policy sets out the process by which staff attend meetings using transport or alternatives. It is based upon a sustainability hierarchy that sets out to reduce a range of issues including key drivers such as Carbon Dioxide emissions, NOx and Particulate emissions (that are hazardous to health), as well as congestion, risk and costs.

The policy relates to business travel only. Commuting falls outside of the scope of this policy. However, it must be understood that home to place of business (A) remains commute until the distance from home to usual place of work (B) is breached.

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.

**Travel Hierarchy of Decision Making**

It is routinely recommended that **where travel** to a workplace is **required** and **necessary** (and home working or virtual alternatives cannot be enacted), that a hierarchy be adopted (see [item 4](file:///C%3A%5CUsers%5Cinfo%5CDesktop%5CEST%20Revisions%2010%5C4%20Hierarchical%20Decision%20Flowchart%20and%20Solutions%20Directory.docx)):

Organisations that adopt shared desks and genuine flexible working will see significant savings from this.

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.

(*Note for some organisations, cost effective may be replaced with such terms as ‘sustainable’ or ‘carbon efficient’*)

Whilst it is recognised that making **no journey** provides the best financial and environmental savings, in producing this [hierarchy](file:///C%3A%5CUsers%5Cinfo%5CDesktop%5CEST%20Revisions%2010%5C4%20Hierarchical%20Decision%20Flowchart%20and%20Solutions%20Directory.docx), it is assumed that the meeting, discussion, networking or activity needs to take place in some shape or form and cannot be simply neglected.

Before embarking upon any journey, members, managers and officers must satisfy themselves that they are taking the most sustainable option. The ten-point travel hierarchy, set out below and in flowchart [form](file:///C%3A%5CUsers%5Cinfo%5CDesktop%5CEST%20Revisions%2010%5C4%20Hierarchical%20Decision%20Flowchart%20and%20Solutions%20Directory.docx), **must be adhered to**:

**Can the activity/meeting be conducted by:**

1. Telephone
2. E-mail or regular correspondence
3. Video-Audio conferencing
4. Walk or Cycle “Active Travel”
5. Use of public transport (train, tram, bus, metro or tube)
6. Shared CarShare (Pool) car
7. Electric Car
8. CarShare (Pool) car (driver only)
9. Private (‘grey’ – mileage reimbursed) car (business insured and assessment form electronically signed)
10. Daily rental hire car

See detailed Hierarchy below.

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]. \*To be removed where not Local Authority.*

**Travel Hierarchy: Decision Flowchart**

For the majority of travel decisions, the simple example 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.

Meeting or perceived business travel need

YES

Are there practical alternatives to travel such as email, telephone or conference call?

Arrange video or teleconference

Is it convenient to walk, cycle or use Public Transport? (e.g. train or bus). Less than x

Cycle or walk or use public transport

Is total period of travel **less** than 8 hours including meeting time or **less** than 75 business miles?

Book a Pool Car (insert own hyperlink)

Check Pool car availability (hyperlink)

Use public transport, book a taxi or reschedule your meeting.

Share the journey with a Colleague and use your own vehicle

Complete the Journey Assessment tool (insert own hyperlink)

Are you willing to use your own car at £0.15/mile and are currently insured for business use

Is the total period you require to travel **more** than 8 hours (including meeting time) or **more** than 75 business miles?

Book a Daily Rental vehicle (insert own hyperlink)

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

**Journey Assessment**

A travel journey must have an Organisational related business purpose. Before undertaking any journey, its necessity must be assessed:

* Can this purpose be satisfied by other means, i.e:
	+ Video/audio conferencing, telephone, e-mail or correspondence?
* Before a journey is undertaken by car consider:
	+ Are alternative means of travel (bus, rail, walk or cycle) 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?

See Hierarchy [flowchart](file:///C%3A%5CUsers%5Cinfo%5CDesktop%5CEST%20Revisions%2010%5C4%20Hierarchical%20Decision%20Flowchart%20and%20Solutions%20Directory.docx) (toolkit item 4) for more detail on the above.

**Vehicles in Use**

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

* CarShare (Pool) Fleet, for business use only (see FAQs).
* Private (Grey Fleet), these are vehicles owned by employees.
* Daily Rental, vehicles called off as required basis. To be used when journey exceeds either 75 miles or 8 hours.
* Lease, these are 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 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).

The Organisation is piloting a tool amongst a selected group of regular CarShare (Pool) drivers. If successful this will be rolled out comprehensively and will provide the driver with the ‘most appropriate’ travel solution based on parameters that are input. [*Not relevant to all fleet providers*]

**Private (Grey Fleet) Vehicles**

Because the [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 September 2017. Previous rates are acceptable for up to one month from the date the new rates apply.

Mileage claims submitted through the Organisations 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 | 13 pence | 8 pence |
| Over 2000cc  | 21 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. |

<https://www.gov.uk/government/publications/advisory-fuel-rates/advisory-fuel-rates-from-1-march-2016>

**Daily Hire**

Employees may elect to use a daily hire car when they meet the criteria. Key criteria after following hierarchy items 1 through 3 above are:

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

*NB the above distance and time figures 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, the line manager is then alerted to address this after the event. Information on booking daily rental vehicles can be found at [FAQs](file:///C%3A%5CUsers%5Cdouglas.rowland%5CAppData%5CLocal%5CMicrosoft%5CWindows%5CTemporary%20Internet%20Files%5CContent.Outlook%5CG07T0G49%5C10%20Car%20Share%20FAQ%20%5BTemplate%5D.docx). 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 sub [**number**]g/km CO2. *[****Number****]* of these are pure electric. The Lease vehicles are all sub [**number**]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 [****number****] figure should be agreed upon by the organisation in considering its effects on the environment and how it wishes to be viewed reputationally and as a local business leader and employer.*

**Exceptional Circumstances**

Instances where there are extenuating circumstances meaning that the above 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**

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

Where staff 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
* Not got 12 or more license points or convictions received
* Have a vehicle in a roadworthy condition.

On every occasion that an employee uses this vehicle, the electronic 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 managers decision should be sought.

**Air or Overseas Travel**

The use of aircraft to travel other than domestically is unusual activity for a [*Organisation]* and in all cases, (domestically and internationally) is discouraged on sustainability grounds.

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

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.

|  |
| --- |
|  |

**Benchmarking**

To establish where there may be opportunities for improvement in the Organisation’s fleet, it is useful to benchmark the Organisation against similar operators.

To do this a range of methods can be employed. Not all fleet operators will be keen to share their data and what they see as their competitive advantage. However, typically in the public sector, travel-plans and reports are fairly routinely shared and this information can assist the Organisation to establish how they compare with similar sized and operated entities by comparison.

Indices to use for comparison between the Organisation and others may include such aspects as:

* Number of employees/regular drivers
* Area of operation (regional, national, European or beyond)
* Type of operation
* Type of vehicles
* Scale of operation.
* Overall Cost
* Average Cost per driver

The above will help the Organisation to understand how it compares to other similar organisations and what sort of savings it might expect to make in moving towards the higher end of these case studies.

The Energy Savings Trust are currently carrying out case study work in this area and more information is expected to become available on our website soon.

**Baselining**

In order to assess the progress, development, success, or otherwise of any new scheme, it is most important to first understand the situation prior to any changes taking place. To do this, a benchmark needs to be established ideally as recently as possible before the implementation of any new scheme or operation. The benchmark data should ideally comprise 12 months-worth of accurate information. 12 months allows for the factoring of seasonal changes and avoids decisions being made on data that is not representative of the normal course of operations (for example August or Christmas). This will provide a baseline from which to set targets and establish the extent and quality of benefits achieved.

Benchmarked data should be as granular as possible and should provide information including:

* Miles driven
* Payments claimed vs mileage rate
* Litres fuelled
* Number of claimants
* Non-car travel use

The above is far from an exhaustive list. It is provided as what might be seen as minimum requirements for such an exercise.

If such data is not available, it may be worth considering collecting it for a short period and normalising it against such aspects as seasonal factors.

**Monitoring Plan**

Having benchmarked the Organisation to establish what level of savings and benefits are possible, the baseline is established as above so as to understand and prove the savings achieved after the instigation of the scheme. This is important because whilst stakeholders may have many reasons for embarking on the scheme, a primary reason will generally be cost savings. Baseline data will allow a thorough cost benefit analysis to take place after the project has been running for 12 months plus and will also allow monitoring and tracking of this to take place during the early months and throughout the process.

The benefits of monitoring include:

* Ability to assess progress in the scheme
* Awareness of problems occurring or unacceptable practices that may be taking place
* Honing and improving the scheme
* Ability to report on progress

There are a range of monitoring methods that can be used, these might include:

* Telematics
* Booking tools
* Access to data (fuel cards, fuel pumped odometer readings)
* Employee surveys

Monitoring is crucial in establishing success, progress and continual improvement to the programme. Evaluation should be on-going but focused in the early months to ensure that bad habits are addressed so that improvements can be made based on information obtained.

**This document forms part of a suite of materials:**

1. Process Roadmap ([1a](file:///C%3A%5CUsers%5Cdouglas.rowland%5CAppData%5CLocal%5CMicrosoft%5CWindows%5CTemporary%20Internet%20Files%5CContent.Outlook%5CG07T0G49%5C1a%20Process%20Roadmap.docx), [1b](file:///C%3A%5CUsers%5Cdouglas.rowland%5CAppData%5CLocal%5CMicrosoft%5CWindows%5CTemporary%20Internet%20Files%5CContent.Outlook%5CG07T0G49%5C1b%20Process%20Roadmap.docx.xlsx), [1c](file:///C%3A%5CUsers%5Cdouglas.rowland%5CAppData%5CLocal%5CMicrosoft%5CWindows%5CTemporary%20Internet%20Files%5CContent.Outlook%5CG07T0G49%5C1c%20Process%20Roadmap.docx))

2/3.[Benefits Matrix Solutions](file:///C%3A%5CUsers%5Cdouglas.rowland%5CAppData%5CLocal%5CMicrosoft%5CWindows%5CTemporary%20Internet%20Files%5CContent.Outlook%5CG07T0G49%5C2%263%20Benefits%20Matrix.docx)

1. [Hierarchical Decision Flowchart](file:///C%3A%5CUsers%5Cdouglas.rowland%5CAppData%5CLocal%5CMicrosoft%5CWindows%5CTemporary%20Internet%20Files%5CContent.Outlook%5CG07T0G49%5C4%20Hierarchical%20Decision%20Flowchart%20and%20Solutions%20Directory.docx) and Solutions Directory
2. Key [Stakeholder Directory](file:///C%3A%5CUsers%5Cdouglas.rowland%5CAppData%5CLocal%5CMicrosoft%5CWindows%5CTemporary%20Internet%20Files%5CContent.Outlook%5CG07T0G49%5C5%20Key%20Stakeholder%20Directory.xlsx)
3. [Travel Policy](file:///C%3A%5CUsers%5Cdouglas.rowland%5CAppData%5CLocal%5CMicrosoft%5CWindows%5CTemporary%20Internet%20Files%5CContent.Outlook%5CG07T0G49%5C6%20Travel%20Policy%20and%20Hierarchy.docx) and Hierarchy
4. Travel [Action Plan](file:///C%3A%5CUsers%5Cdouglas.rowland%5CAppData%5CLocal%5CMicrosoft%5CWindows%5CTemporary%20Internet%20Files%5CContent.Outlook%5CG07T0G49%5C7%20Travel%20Action%20Plan.xlsx)
5. Sustainable [Travel Plan](file:///C%3A%5CUsers%5Cdouglas.rowland%5CAppData%5CLocal%5CMicrosoft%5CWindows%5CTemporary%20Internet%20Files%5CContent.Outlook%5CG07T0G49%5C8%20Sustainable%20Travel%20Plan.docx)
6. [Business Plan](file:///C%3A%5CUsers%5Cdouglas.rowland%5CAppData%5CLocal%5CMicrosoft%5CWindows%5CTemporary%20Internet%20Files%5CContent.Outlook%5CG07T0G49%5C9.%20Business%20Plan%20Cabinet%20Report%20Template.docx) Cabinet Report
7. [Car Share FAQ](file:///C%3A%5CUsers%5Cdouglas.rowland%5CAppData%5CLocal%5CMicrosoft%5CWindows%5CTemporary%20Internet%20Files%5CContent.Outlook%5CG07T0G49%5C10%20Car%20Share%20FAQ%20%5BTemplate%5D.docx) [Template]