



## TRAVEL WISE



## WORK WISE



## GUIDANCE ON WORK RELATED TRAVEL

# Foreword

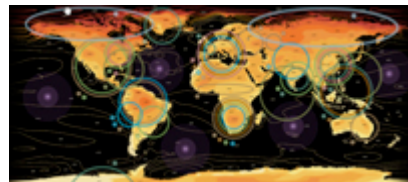
The Council is very aware of the environmental footprint of its organisation. With over 9,000 staff, our travel during work has an enormous impact upon the environment.

This guide has been produced to help all of us reduce the environmental impact of work-related travel. The guide outlines a number of practical travel choices that we can all consider and use if we are required to undertake travel for work.

The Council will be promoting and using the staff travel guide “Travel Wise - Work Wise”, to help us to reduce the impact of work related car travel on the environment.

The authority will be running a number of campaigns and events and we would be delighted to hear of your personal successes in this area.

It is appreciated that changing travel habits is not easy for everyone, but changing or reducing our transport use will benefit the environment and future generations.



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## **1. Introduction and Scope**

This document sets out the guidance relating to the arrangements for staff travel for work related purposes whilst employed by Carmarthenshire County Council. It should be read in conjunction with the Authority's Staff Travel Policy and section 11 of the Authority's Financial Procedure Rules covering Travelling and Subsistence expenses which set out the policy and procedure for work related staff travel and reimbursement.

The scope of this guide includes:

- ⊕ Travel Modes
- ⊕ Purpose of Journey
- ⊕ Geographical coverage

### **Travel Modes**

The modes of travel included within the guide are:

- ⊕ Cycling and Walking
- ⊕ Public Transport
- ⊕ Car Share
- ⊕ Pool Car or Van
- ⊕ Hire Car or Van
- ⊕ Lease Cars
- ⊕ Privately Owned Car

### **Purpose of Journey**

There are various reasons why we need to travel in work. Such needs will include journeys essential to the function of the job; to attend further education or training and/or to attend conferences or seminars.

## Geographical area

This guide covers all journeys within and outside the boundaries of Carmarthenshire County Council, necessitated by work related duties/obligations.

## **2. Guidance Objectives, Purpose and Principles.**

### Objective & Purpose

The objective and purpose of this guide is to provide guidelines that will assist staff to reduce the level of CO<sup>2</sup> emissions caused by work related transport. The authority has set a target to reduce its CO<sup>2</sup> emissions from transport by 10%.

The guidance will also help you choose the most cost effective and appropriate form of transport for work related journeys and help to reduce the level of car journeys required for work.

### Principles

The key principles established by this guide are to:

- ⊕ Help ensure equity, consistency and fairness across the Council
- ⊕ Help to establish that work related travel schemes are provided on the basis of recompense. The guide will help establish a consistent approach for travel undertaken by employees when conducting Authority business
- ⊕ Help ensure that there is balance between the environmental and economic options for travel
- ⊕ Reduce the level of CO<sup>2</sup> emissions generated from work related travel and to encourage/ensure the most economical mode of travel is selected for work related travel
- ⊕ Help ensure that work related travel is managed and reviewed; and set a framework and appropriate processes that will enable staff travel to be managed and regularly reviewed

### **3. Responsibilities**

Responsibility for the delivery and implementation of this guide is set out as follows.

#### **People Management and Performance**

The People Management and Performance Department (**PMP**) will be responsible for developing, implementing and reviewing the staff travel policy. PMP will ensure that all employees will be made aware of their responsibility in relation to the staff travel policy and guide.

#### **Corporate Resources**

The Corporate Resources Department is responsible for developing, implementing and reviewing the financial implications of the staff travelling policy and guide.

The Corporate Resources Department is responsible for provision of management information, the process of reimbursement of staff travelling claims and undertaking periodical audits of staff travel.

#### **Transport Thematic Review Group**

The Transport Thematic Review Group is responsible for undertaking an annual review of the staff travel policy and guide. The group will assist with the monitoring and review of the management information to assess the effectiveness of the staff travel policy and guide.

#### **Managers**

Line Managers are responsible for ensuring that all staff are made aware of the Staff Travel policy and guide.

Managers will be responsible for ensuring that the most economical options for travel are explored and selected.

Managers will be responsible for ensuring that all staff are aware of and comply with all statutory obligations as set out in Section 5 of this document.

Managers will be responsible for reviewing and agreeing the most effective form of transport provision for travel journeys with staff. They will also monitor performance, check, authorise and review staff travel claims to ensure targets are agreed and met by each member of staff.

## **Individual Staff**

All staff are responsible for complying with the statutory obligations in relation to transport during the course of work and to comply with the Staff Travel Policy and guide.

Where employees are required to submit claims for the reimbursement of travelling expenses, they/you are responsible for the completion and submission of accurate claim forms in accordance with the Staff Travel Policy and Financial Procedure Rules.

### **4. Method of Transport Provision.**

#### **Work Travel as a Requirement of the Post/Job Duties.**

A range of options will be considered when determining the most appropriate mode of travel provision, specific to a job/post and type of work.

#### **Regular Travel required by the job holder to undertake the duties of the post – Within County.**

Line Managers should undertake a regular assessment of the travel requirements for each post to ensure travel for work related purposes is appropriate, cost effective and sustainable. This should also be considered prior to the appointment of any new employee to a post. If employees are required to use their own motor vehicle for the efficient performance of their duties then the following options will need to be considered:

- ⊕ Provided Vehicle
- ⊕ Essential Car User Allowance
- ⊕ Casual Car User Allowance
- ⊕ Lease Cars

#### **Provided Vehicle for use for work Purposes**

In some instances it will be appropriate to provide the employee with a vehicle if the vehicle can be parked at council premises overnight, or if the employee is required to take a vehicle home as he/she is required to travel directly to and from jobs in the interest of service efficiency.

Generally the provided vehicle option is considered viable where the amount of travel required as part of the job exceeds approximately 3,750 miles per annum for a light van and approximately 4,300 miles for a light car depending on the length of the period of contract.<sup>1</sup> Specific calculations can be undertaken for each post and type of vehicle by contacting the Authority's Fleet Manager.

Managers and staff must be satisfied that the statutory obligations set out in section 6 of this guide and the Authority's Fleet Road Risk Policy are complied with, if this option is selected..

<sup>1</sup> Baseline figures at November 2009.

## **Essential Car User Allowance**

Essential User allowance can be used subject to authorisation by a Director. This arrangement can be made where the employee is required to use their own motor vehicle for the efficient performance of their duties and the authority is satisfied that the cubic capacity of the car is appropriate. They will receive allowances for the use of their own motor vehicle on business only after authorisation by the authority.

Essential users are those whose duties are of such a nature that it is essential for them to have a motor car at their disposal whenever required. If the employee uses a private car in carrying out those official duties then they shall be entitled to receive a lump sum allowance and mileage rates as set out in the Staff Travel Policy.

Managers and staff must be satisfied that the statutory obligations set out in section 6 of this guide are complied with.

## **Casual Car User Allowance**

Casual User allowance can be given subject to authorisation by a Director. This arrangement can be made where the employee is required to use their own motor vehicle for the efficient performance of their duties and the authority is satisfied that the cubic capacity of the car is appropriate.

Employees will receive allowances for the use of their own motor vehicle on business only after authorisation by the authority. If the employee uses a private car in carrying out those official duties then they shall be entitled to receive allowances as set out in the Staff Travel Policy.

Managers and staff must be satisfied that the statutory obligations set out in section 6 of this guide are complied with.

<sup>1</sup> Baseline figures at November 2009.



## **Lease Cars / Car Contract Hire Scheme.**

The provision of a lease car is made where there is a benefit to the authority and the vehicle selected is suitable for the job holder to fulfil their duties set out in the post holder's job profile.

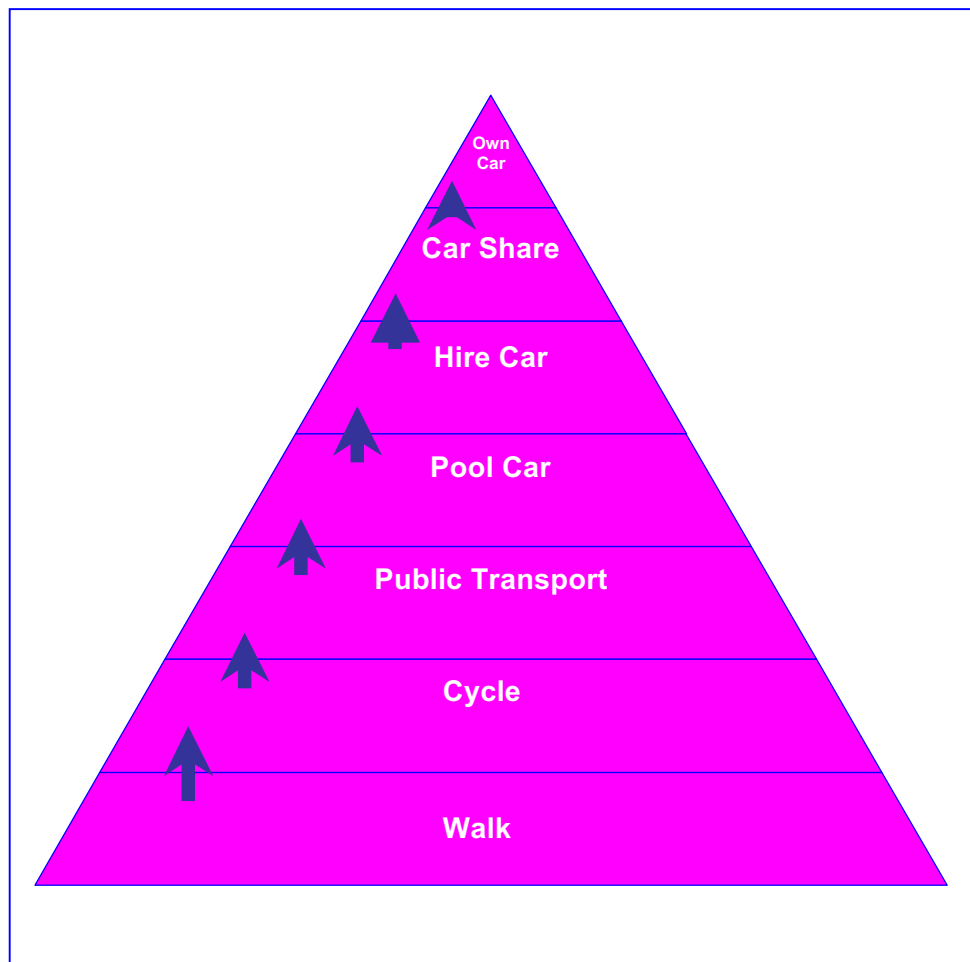
All designated car users undertaking in excess of 1,500 business miles per annum will be eligible to participate in the scheme subject to the approval of the Departmental Director.

Managers and staff must be satisfied that the statutory obligations set out in section 6 of this guide are complied with.

## **In County Ad Hoc Journeys**

The travel pyramid model has been developed to help determine the most appropriate form of travel for ad hoc in county journeys. Please plan your journey as early as possible.

### **Travel Pyramid – Ad Hoc Travel**



The following check list should be followed to determine the most appropriate form of travel:

- ⊕ Is the journey essential, necessary or would a telephone call or letter remove the need for the journey?
- ⊕ Is telephone/video conferencing available and can it be used?
- ⊕ Is the journey within reasonable walking distance / can the visit be made on foot?
- ⊕ Walking should be considered as an option for short journeys with due regard to reasonable distance, weather conditions, journey time and personal circumstances.
- ⊕ Is cycling an option? Cycling should be considered as an option for short to medium journeys with due regard to reasonable distance, weather conditions, journey time and personal circumstances. A small number of pool bicycles will be available at some offices.
- ⊕ Is public transport available and an effective option when considering staff time? Taking into account the access, time and cost of the journey, public transport should be considered as an option. Information on local bus timetables can be found on the intranet using the following link.

<http://www.carmarthenshire.gov.uk/English/transport/Buses/Pages/BusTimetables.aspx>

Traveline Cymru also offers a bespoke planning service for journeys via public transport and this can be found by following the link appended:

<http://www.traveline-cymru.info/>

Local rail timetables can be found by following the link appended:

<http://www.nationalrail.co.uk/>

- ⊕ Is a pool vehicle available? Pool cars are operated in a number of locations across the authority; Contact details for the locations are set out in Appendix A, journeys for pool cars should be coordinated to ensure opportunities for car sharing are exploited wherever possible.
- ⊕ Is a hire vehicle available? The county Council has call off contracts for the hire of vehicles at very competitive rates. If the demand for a

vehicle is likely to exceed a total travel distance of approximately 45 miles in any day, it will be more cost effective to hire in a light car.

Vehicles can be hired by contacting the central hire desk at Transport and Engineering Division. Departments will be e mailed a form to complete to authorise the hire and provide a cost code.

**Contact: Tel. 01554 784139**

- ⊕ Could car sharing be an option – is a colleague from the authority undertaking a similar journey that is able to share?

Car sharing facility – <https://www.liftshare.com/wales/>

If the journey in an employee's car is the only option, having considered the Travel Pyramid process, then plan journeys effectively to save time and money. For example group together visits within localities to avoid repeating journeys. Consider the total cost of the journey to include the cost of staff time.

Managers should consider this full range of options prior to authorising a journey and individuals should utilise the most cost effective and appropriate form of transport.

Managers and staff must be satisfied that the statutory obligations set out in section 6 of this guide are complied with.

### Out of County Journeys.

Journeys out of county where the distance exceeds 50 miles should be undertaken by one of the three options appended and always planned well in advance if possible:

Public Transport – Rail journeys should prove to be the more effective when considering journey distance, time and emissions. All rail journeys can be booked and paid for in advance via Corporate Resources.

Please remember the more in advance journeys are booked the cheaper rail travel becomes, it's also cheaper to book two singles where possible\*

\* Some restrictions apply – confirm details at the time of booking.

Pool Car - Pool cars are operated in a number of locations across the authority. Contact details for the locations are set out in Appendix A. Journeys for pool cars should be coordinated to ensure opportunities for car sharing are exploited wherever possible.

Hire Vehicles – The County Council has call-off contracts for the hire of vehicles at very competitive rates. Vehicles can be hired by contacting the central hire desk at the Transport and Engineering Division. Departments must complete a request form that will be e mailed to you on request. The central hire desk contact is

**Tel. 01554 784139**

All employees who are required to drive pool cars or hired cars must complete an assessment check and provide details of driver licenses.

## **5. Statutory Obligations & Risks**

Transport is one of the most heavily regulated of services. The use of transport also has some overlap with statutory health and safety responsibilities. There is a requirement to ensure that the Authority and the individual comply with legislation.

The employee must:

- ⊕ Have a valid driving licence for the class of vehicle driven
- ⊕ Must ensure that their own vehicle is insured for Business use
- ⊕ Ensure that any vehicle utilised for the purpose of work travel must be maintained to the required standard
- ⊕ Comply with all aspects of Health & Safety regulation
- ⊕ Comply with appropriate road traffic law when using a vehicle for business purposes.
- ⊕ Ensure that where a pool or hire car is used it is only used on Official Authorised Business including Authorised Passengers and goods.
- ⊕ Drive safely at all times.

The employer must:

- ⊕ Undertake periodical Driver licence and insurance checks (minimum of annually).
- ⊕ Seek assurances from the employee that the vehicle is fit for purpose where the employee uses their own vehicle.

- ⊕ Comply with all aspects of Health & Safety regulation including a risk assessment for journeys. Consideration of risk will include for example :
  - Journey distance, time and working hours
  - Loading and Unloading – manual handling
  - Nature of the route
  - Loan working
  
- ⊕ Provide adequate training where there is a requirement
  
- ⊕ Retain adequate records

## **6. Claims for Reimbursement:**

This section sets out the processes for claims, authorisation and payments.

Following line management approval and after the journey has been undertaken the individual will be responsible for accurately completing a log of each journey whether through the log sheet for Hire/Pool car use or an official travel claim form or on line claim for the reimbursement of expenses for use of their own vehicle. Claims will be submitted in accordance with the Financial Procedure Rules and the Staff Travel Policy.

Specific journey claims will be made in accordance with the following criteria:

Staff are eligible to claim travel and subsistence in accordance with their Conditions of Service.

Claims should be made during the month following the incurring of the expenditure on forms approved for the purpose by the Director of Resources or through Resource Link. Where claims are not submitted promptly a separate form will be required for each month. Forms containing more than one month will be returned unpaid. Authorising Officers may be asked to confirm how they have satisfied themselves of the reasonableness of late claims. The need for claims to be submitted promptly is critical at the end of the financial year to ensure that claims are charged to budgets and tax in respect of the correct year.

All staff are expected to travel in the most economical manner to the discharge of their duties.

The following rules must be observed when completing a claim:

The mileage claimed must not exceed the mileage of the journey.

The normal starting and finishing place for Official Journeys will be the location where the individual is based.

Where an Officer starts a journey from a location other than his/her base or ends a journey at a location other than his/her base, the mileage claimed should be limited to the "Additional Mileage" incurred as a result of their official duties.

The Additional Mileage Principle recognises the saving to the Officer in not travelling to or from the base and reduces the amount that can be claimed accordingly whilst ensuring that the Officer is fully compensated for any additional mileage undertaken in connection with their official duties. For example:

### Example 1

Work: Carmarthen  
Home: Llanelli  
Travel to: Cross Hands

Mileage from Work to Cross Hands: 12.4 miles  
Mileage from Home to Cross Hands: 9.5 miles  
Mileage claim eligible – **None**

### Example 2

Work: Carmarthen  
Home: Llanelli  
Travel to: Llandeilo

Mileage from Home to Base: 21.7 miles  
Mileage from Home to Llandeilo: 21.7 miles  
Mileage claim eligible – **None**

If the employee then returned to his/her base at Carmarthen, this element of the journey would be eligible for reimbursement as the journey would incur additional mileage compared to the 21.7 miles regular work journey. However if it was an all day meeting and the employee returned home he/she would not be able to claim mileage.

The same interpretation would apply for journeys from locations other than the Officer's base to the Officer's home.

For official journeys undertaken outside normal working hours (i.e. Weekends or evenings) the actual journey may be claimed e.g. Officers home to destination and return journey home. Staff working overtime during evenings and week ends and **who are paid for such duty are not entitled to claim travelling expenses to or from their place of work.**

Where an officer opts to travel in his /her own vehicle in circumstances where a cheaper suitable mode of transport should have been used, the claim should not exceed that which would have been paid if the alternative transport had been used e.g. It is normally cheaper to travel by train from the Carmarthenshire area to London but where a member of staff prefers to drive in his / her own vehicle, he / she may claim the equivalent of the train fare (provided that this is lower than mileage claim would be). Cases where this applies should be clearly explained on the claim form.

### **Certification.**

Completed claims must be approved by a signatory approved by the Chief Officer for that purpose. Following approval, claims must not be returned to the claimant but should be despatched promptly to the Payments Section. No Officer should certify their own expense claims.

## **7. Claims - Claim Management and Analysis.**

There are responsibilities for individual staff and managers associated with the process of the undertaking work related journeys, the reimbursement of and monitoring of expenditure incurred.

### **The Individual.**

The individual must be satisfied that the journey is absolutely necessary and that all alternatives to travel have been explored as set out the travel pyramid model.

Where a journey using an individual's own car has proved necessary and a claim for reimbursement of expenditure incurred is to be made, the following rules must be complied with when completing a claim:

- All staff are expected to travel in the most economical manner appropriate to the discharge of their duties.
- The mileage claimed must be in accordance with the shortest route and the set distance criteria for journeys travelled between fixed offices e.g. County Hall to Ty Elwyn.

### **The Manager.**

The manager is responsible for ensuring that staff have been made aware of the content and requirements of the Staff Travel Policy and this Guide.

Managers must review the performance of their service in relation to staff travel to ensure it is minimised/optimised and any targets agreed with each member of staff at the start of each financial year.

Managers will review performance on a monthly basis or more frequently if required. Information reports will be provided by the People Management and Performance Department.

Where there is a requirement for staff to travel, the manager must be satisfied:

- that the journey is necessary.
- that all alternatives to travel have been explored, as outlined in the travel pyramid and if the journey is necessary,
- the individual has complied with the statutory obligations outlined in section 6

Following receipt of a claim for reimbursement the manager is responsible for reviewing the claim and providing authorisation if he/she is satisfied that the claim is correct.

