**Policy / procedure template**

**Journey management policy**

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**Instructions**

This template is intended to help you build a journey management policy that’s right for your organization. Save the template to your device. Think about the situations and risks your employees encounter when they are driving or riding in a work vehicle. Edit the template so it explains what your organization expects its employees to do / not do. Replace items **written in orange** with your own information, Delete the disclaimer and these instructions when done.

*[****Organization****]* **journey management policy**

**Why we have this policy**

*[****Organization****]* is committed to providing safe work environments for our employees. That includes minimizing risks associated with work-related travel, and particularly driving. This policy identifies and explains principles and practices we and our employees will apply to help manage the risks associated with driving or riding in a vehicle for work.

**Who needs to follow this policy**

All *[****Organization****]* employees must follow these steps if they are planning to drive, or travel in a vehicle, for work purposes.

**Employer responsibilities**

As part of our responsibilities to ensure the health and safety of our employees,*[****Organization****]* will support our employees to implement this policy. We will periodically review and revise this policy to keep pace with the driving our employees do.

**Supervisor responsibilities**

Supervisors are responsible to

* Provide employees who report to them with a copy of this policy, explain it to them, and confirm that they understand what this policy requires them to do
* Work with employees to apply principles in this policy (e.g., avoid unnecessary driving, build low risk trip plans, etc.)
* Periodically verify that measures in this policy continue to be properly applied.

**Employee responsibilities**

Employees are responsible to know and follow these procedures whenever they are driving or riding in a work vehicle.

**Key strategies to achieve our journey management goals:**

1. Avoid unnecessary work-related travel
2. Use alternatives such as a flight, public transit, walking, cycling or another means rather than driving when travel is necessary
3. Recognize possible risks that may be encountered when travel is necessary and driving is the best way to get there, and build a trip plan that includes measures to minimize those risks

**Approval for work-related travel**

*[Adjust this paragraph so it explains the parameters your organization applies. For example, your employees might need approval for trips of more than 50 km or more than 2 hours duration, etc.]*

Travel for work outside the municipality in which the employee’s home office is located requires prior approval by a manager. Managers may delegate approval authority to their supervisor(s).

**Avoiding unnecessary travel**

Managers, supervisors, and employees are responsible to implement measures to avoid unnecessary travel. To decide if travel is necessary, the manager should ask, "Can we get this work done and accomplish our objectives without having an employee travel?" When the answer is "Yes," that travel is unnecessary.

Before preparing and submitting trip plans for approval, the employee must be confident that trip is necessary. Before approving plans, the manager or supervisor must be similarly convinced.

**When travel is necessary**

When travel is necessary, managers, supervisors, and employees are responsible to ensure that travel is planned and carried out in ways that minimize risks. Employees will first seek to use practical travel alternatives rather than driving (e.g., plane, bus, taxi, cycling or walking).

If travel is necessary and driving is the best way to get there, *[****Organization****]* recognizes two types of trips:

1. Routine trips
2. Non-routine trips

**Routine trips**

A routine trip satisfies these criteria:

1. The employee will be away from their primary work location less than 4 hours
2. The driver is familiar with the route and traffic conditions because they have made that trip at least 3 times
3. The trip is expected to involve no high-risk conditions such as severe weather, poor road conditions, difficult traffic, high crash frequency routes or intersections, no reliable means of communications, etc.

**Planning and approving routine trips**

The driver will prepare a trip plan using the [Basic Trip Planning Form](https://roadsafetyatwork.ca/resource/form/basic-trip-plan-form/), and complete and submit a [TripCheck](https://roadsafetyatwork.ca/resource/tool/tripcheck/) report.

Their supervisor will review the plan and:

1. Approve the trip, or
2. Recommend changes to the trip plan to reduce risks, and upon making those changes, approve the trip, or
3. Decline to approve the trip.

All trip plans will include measures consistent with our [check-in procedures](https://roadsafetyatwork.ca/resource/template/check-in-procedures-template/).

**Non-routine trips**

Trips that don’t meet the criteria of routine trips are non-routine trips, and deserve added planning measures to help reduce risks.

**Planning and approving non-routine trips**

The driver will prepare a trip plan using the [Risk-Rated Trip Planning Form](https://roadsafetyatwork.ca/resource/form/risk-rated-trip-plan-form/), and complete and submit a [TripCheck](https://roadsafetyatwork.ca/resource/tool/tripcheck/) report.

Typically, the employee will submit their trip plan to their supervisor at least 1 day before the intended travel date. This will enable the supervisor to review and consider the plan, and work with the driver to implement risk reduction measures or make changes to work schedules, etc. The supervisor will review the plan, and:

1. Approve the trip, or
2. Recommend changes to the plan to reduce risks, and upon making those changes approve the trip, or
3. Decline to approve the trip

The supervisor and the employee will sign the approved trip plan.

Trip plans will include measures consistent with our [check-in procedures](https://roadsafetyatwork.ca/resource/template/check-in-procedures-template/).

**Employee acknowledgment**

Your signature below certifies that you agree to comply with this policy / procedure. Non-compliance is a serious matter and may subject you to disciplinary action.

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Employee signature Date

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Employee name (print)

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Supervisor signature Date

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Supervisor name (print)