Example Journey Management Policy and Procedures

Below is an example of a journey management policy and associated procedures for a fictitious Manitoba ad agency. As you read the document, think about the similarities and differences between the driving Awesome Ad Agency employees do, and the driving that occurs in your workplace. Customize this policy and procedure to fit the driving circumstances in your workplace. Then, put it to work.

Awesome Ad Agency (A³) has clients throughout Manitoba. Although A³ uses video conferencing and web meetings to minimize employee travel, their employees have to drive to client locations to work on projects for a few days. Drives range from 30 minutes to three (3) hours, and longer for remote areas. Employees that drive their own vehicle for work often leave from and return to their homes without first driving to the Winnipeg office. Rather than driving back and forth for multi-day sessions, A³ encourages employees to stay overnight while working at Brandon, Flin Flon or Thompson locations. A³ employees share rides when they can but usually drive alone.

Awesome Ad Agency (A³) Employee Travel Policy

A³ is committed to providing safe work environments for our employees and minimizing the extent to which they are exposed to hazards during their work, including hazards with any work-related travel.

Key strategies to achieve that goal include:

1. avoid unnecessary work-related travel
2. for travel that is necessary, preferentially use alternatives such as public transit, walking, cycling and other means, rather than driving
3. for travel that is necessary, have and use a reliable process to keep track of employee whereabouts, verify their continued well-being and enable us to provide or mobilize prompt emergency assistance, as required.

A³ will develop, apply and periodically re-evaluate and improve an effective journey management procedure.

Approval for Work-Related Travel

All travel for work outside A³ office locations 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 work-related travel*. Before submitting travel plans for approval, the employee must be confident that travel is necessary. Before approving plans, the manager or supervisor must be similarly convinced.

* To determine if work-related travel is necessary or unnecessary, the manager should ask the question, "Can we achieve desired work outcomes as effectively without having an employee travel?" When their answer to that question is "Yes", that work-related travel is unnecessary.

Awesome Ad Agency (A³) Journey Management Procedure

Managers, supervisors and employees are responsible to ensure that all work-related travel is planned and carried out in ways that minimize exposure to hazards. All employees will give practical priority to using alternative travel modes* to avoid unnecessary driving. Before submitting trip plans that involve driving, the employee must be confident that:

- the trip is necessary, and
- driving is the best way for the employee(s) to complete that trip.

Before approving trip plans, the manager and/or the supervisor must be similarly convinced.

* alternative travel modes refers to employee transportation other than in a motor vehicle and includes plane, motorcycle, train, bus or other public transit, taxi, walking, cycling, etc.

All work-related travel that involves an A³ employee driving or riding in a vehicle, bicycle, motorcycle, (excluding taxi, bus or other public transit) requires manager approval.

A³ recognizes two types of work-related motor vehicle travel. They are:

1. Routine trips
2. Non-routine trips

A. Routine Trips

In order to qualify as a routine trip, it must satisfy all of the following criteria:

1. The employee will be away from their main work location for not more than half of a work day.
2. The employee is familiar with the intended travel route(s) and destination(s).
3. The employee completes the trip regularly (i.e., at least once a week) and has completed it at least three (3) times.
4. The trip involves no high-risk driving circumstances (e.g., severe weather, poor road conditions, high crash frequency locations or intersections, no reliable means of communications).

Planning and Approving Routine Trips

Employees may submit trip information:

1. verbally during discussion with their supervisor, or
2. on a completed Trip Plan form submitted to their supervisor or check-in contact.

Using either format, the employee will submit the following information:

1. name of driver (and passengers, if any)
2. date of travel
3. route - highway, road name(s)
4. vehicle information - private or company-owned, make, model, colour, licence
5. employee cell phone number
6. client/destination address and contact phone number
7. departure time
8. check-in frequency
9. expected time of return

After reviewing the trip information with the employee, the supervisor will:

1. approve the trip,
2. make recommendations for changes to the plan (e.g., delay trip until better road conditions, use a different route, etc.), and approve the trip, or
3. decline to approve the trip.

If the supervisor approves the trip verbally, the supervisor will record such approval in their daily journal, calendar or other permanent method. If the supervisor approves the trip presented on the Trip Plan form, the supervisor and the employee will sign the completed form.

Check-In Procedure

Travelling employees must carry a working cell phone and charger and other communicating devices while they are travelling on urban, remote or rural routes.

Check-ins are to be implemented when either the employee or the supervisor feels they are warranted. When check-ins are implemented, the supervisor and the travelling employee will agree on the frequency and/or designate specific check-in times.

The supervisor will serve as the check-in contact, or they may designate another co-worker to be the check-in contact. If that occurs, the supervisor will tell both the check-in contact and the travelling employee.
The travelling employee must tell their supervisor when they plan to return, and check-in with their supervisor when they have returned from the trip.

**Late Check-In Response Action**

If a travelling employee does not check-in call **within 10 minutes** of the planned check-in time or return check-in, the supervisor or designated check-in contact will do the following:

1. Try to contact the employee using the cell phone number provided.
2. If unsuccessful, try to determine the whereabouts of the employee by contacting a client or co-worker who may have had recent contact with the employee during the trip.
3. If those attempts are unsuccessful, wait 10 minutes, and repeat step 1.
4. If those repeated attempts do not successfully contact the travelling employee or otherwise **confirm** their well-being and location, the check-in contact will immediately:
   - notify the supervisor and,
   - initiate internal emergency response, and
   - contact local emergency service providers or call 911.

**B. Non-Routine Trips**

Work-related trips that do not meet all of the criteria for a routine trip are non-routine trips, and will be planned and managed as follows.

**Planning and Approving Routine Trips**

Employees may submit trip information to their supervisor on a completed Trip Plan form.

Typically, the employee planning to travel will submit their trip plan to their supervisor at least two (2) days before the intended travel date. This will enable the supervisor to review and consider the planned trip, make timely recommendations for adjustments and accommodate potential work scheduling adjustments.

On the Trip Plan form, the employee will indicate:

1. name of driver (and passengers, if any)
2. date of travel
3. route - highway, road name(s)
4. vehicle information - make, model, colour, licence
5. employee cell phone number
6. client / destination address and contact phone number
7. departure time
8. check-in frequency
9. expected time of return

After reviewing trip information with the employee, the supervisor will:

1. approve the trip
2. make recommendations for changes to the plan (e.g., delay trip until better road conditions, use a different route, etc.), and approve the trip,
3. conditionally approve the trip plan (e.g., pending weather or road conditions, etc.), or
4. decline to approve the trip and identify another way to get the work done.

If the supervisor approves a trip presented on the Trip Plan form, the supervisor and the employee will sign the completed form.

**Check-In Procedure**

The travelling employee is responsible to initiate check-in calls at, or as near as possible to, the pre-arranged check-in time. If a co-worker is in the vehicle, the co-worker should make the call. If the driver must make check-in calls, they must pull safely off the road before doing so.

When the check-in contact receives the call, they will record the time and employee location on the Trip Plan form.

The supervisor will serve as the check-in contact, or they may designate another co-worker to be the check-in contact. If that occurs, the supervisor will advise both the check-in contact and the travelling employee.

**Check-In Frequency**

Travelling employees are required to check-in:

1. at the start of the day to confirm the travelling employee has a cell phone, and it is working
2. at the end of the shift if the employee is not returning to the office that day, or when the employee returns to the office
3. at least every two (2) hours during the work day
4. **hourly** when driving in MODERATE hazard conditions
5. **every 1/2-hour** when driving in HIGH hazard conditions.*

*Employees should not plan, and supervisors should not approve, travel plans that include driving in high hazard conditions. If for unavoidable reasons an employee feels they must drive in high hazard conditions, they must get their supervisor’s approval before doing so, and check-in every half hour.

**Late Check-In Response Action**

If a travelling employee does not check-in **within 10 minutes** of the planned check-in time, the supervisor or designated check-in contact will do the following.

1. Try to contact the employee using the cell phone number provided.
SAFE Driving at Work

2. If unsuccessful, try to determine the whereabouts of the employee by contacting a client or co-worker who may have had recent contact with the employee during the trip.
3. If those attempts are unsuccessful, wait 10 minutes, and repeat step 1.
4. If those repeated attempts do not successfully contact the travelling employee or otherwise confirm their well-being and location, the check-in contact will immediately:
   - notify the supervisor, and
   - initiate internal emergency response, and
   - contact local emergency service providers or call 911.

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