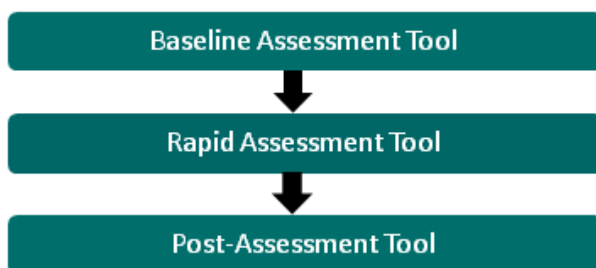


## Alternatives to Travel Assessment Tool: Understanding the options and measuring the returns


### 1 Background

- 1.1 The Alternatives to Travel (ATT) Assessment Tool is a device enabling organisations to understand their total expenditure on travel and what the costs and benefits are of this expenditure.
- 1.2 The tool requires the input of data from a variety of sources. This data provides a valuable baselining process for your organisation allowing monitoring of implemented ATT measures. The Assessment Tool contains three distinct stages as shown in Figure 1.1.

**Figure 1.1 – Assessment Tool Stages**



### 2 Introduction to the Baseline Assessment Tool

- 2.1 This guidance note focuses on the Baseline Assessment Tool. This is the starting point for all organisations and the level of detail provided will determine the outputs you can achieve from the Rapid and Post Assessment Tools. On completion of the Baseline Assessment Tool you will be able to create a business case for making efficiencies and communicate results to decision makers and stakeholders.
- 2.2 The Baseline Assessment Tool is broken down into three worksheets which are accessed via the red tabs at the bottom of the tool.
- 
- 2.3 The information provided within these worksheets will help you identify which ATT measures will be most beneficial for your organisation. Factors influencing the suitability could include;
- Expenditure – expenditure on travel can be significant. By implementing measures there will be an opportunity to present financial savings to decision makers.
  - Emissions - demonstrating emissions savings through ATT measures helps to build a business case for meeting emissions targets at your organisation.
  - Congestion and Air quality – demonstrating improvements to congestion and air quality will provide a business case based on the benefits to society.
- 2.4 The tool has been designed to minimise user input and will automatically calculate cells highlighted in **LIGHT BLUE**. Fields that require data entry are displayed in **RED**.

- 2.5 Please remember **distance travelled data will need to be entered in miles**. A distance convertor is provided in the top right hand corner of tab ‘Baseline Assessment Tool (a)’.

Please use this tool to convert kilometres to miles

Distance Convertor	Kilometres	Miles
	0.0	0.0

- 2.6 A number of speech boxes like the one displayed above provide further information within the spreadsheet.
- 2.7 The tool is detailed and that not all information may be readily available. It is not recommended that you invest significant time and resource at this early stage but seek to enter as much information as possible.

**Bespoke Assessment**

- 2.8 The tool includes an optional bespoke section, which would only be completed if your organisation has any additional areas to monitor that are not already covered. The use of this section will depend on the availability of information and the type of ATT measures proposed.

### 3 Completing the Baseline Assessment Tool (a)

- 3.1 This section provides step by step guidance on sourcing the data and completing the Baseline Assessment Tool (a).

**Background Data**

Background	
Baseline Year (dd/mm/yy - dd/mm/yy):	
Number of Employees (FTE)	
Have you provided a copy of the following documents?	
Travel Policy	
Expenses Policy	
Health and Safety Policy	

Please select from the drop down list whether the Policy documents have been provided to JMP

- 3.2 This section asks you to enter background information. Please enter the baseline year for the data you have available, along with the number of full time equivalent (FTE) employees at your organisation. To help with understanding your organisations travel we would also like a copy of your Travel Policy, Expenses Policy and Health and Safety Policy. Please indicate using the drop down options whether this information has been provided.

## Headline Travel Information

### Headline Travel Information

	Expenditure (£)	Distance Travelled (miles)	Emissions (kg of CO <sub>2</sub> e)	Emissions (Cost £)	Emissions Sense Check (kg of CO <sub>2</sub> e)	Emissions Sense Check (Cost £)	Air Quality (g NOx)	Air Quality (£)	Congestion
Car Travel (all modes)				£0.00	0.00	£0.00	0.00	£0.00	
Rail Travel				£0.00	0.00	£0.00	0.00	£0.00	
Air Travel - Domestic				£0.00	0.00	£0.00	0.00	£0.00	
Air Travel - Short Haul				£0.00	0.00	£0.00	0.00	£0.00	
Air Travel - Long Haul				£0.00	0.00	£0.00	0.00	£0.00	
Taxi				£0.00	0.00	£0.00	0.00	£0.00	
Other									

3.3 This section considers the main travel modes. These include travel by car, rail, air (domestic, short haul and long haul), taxi and a category for 'other' travel.

3.4 For each travel mode displayed in the left hand column please provide information on expenditure, distance travelled (miles) and emissions (kg). This information may be available from a number of business areas. This could include Finance, Human Resources, Procurement and/or Estates.

## Vehicles

### Vehicles

	Expenditure (£)	Distance (miles)	Emissions (kg of CO <sub>2</sub> e)	Emissions (Cost £)	Emissions Sense Check (kg of CO <sub>2</sub> e)	Emissions Sense Check (Cost £)	Air Quality (g NOx)	Air Quality (£)	Congestion
Pool				£0.00	0.00	£0.00	0.00	£0.00	
Company Car				£0.00	0.00	£0.00	0.00	£0.00	
Hire				£0.00	0.00	£0.00	0.00	£0.00	
Grey Fleet				£0.00	0.00	£0.00	0.00	£0.00	
Car Club				£0.00	0.00	£0.00	0.00	£0.00	
Taxi				£0.00	0.00	£0.00	0.00	£0.00	

3.5 The majority of travel, and therefore expenditure in most Public Sector Organisations are in vehicles. Vehicle travel can be sub categorised, please enter any further data you have about the various type of vehicle travel here, by liaising with the following departments:

- **Pool Cars:** Classified as a vehicle available to more than one employee, by reason of their employment. It is not usually used by one employee to the exclusion of other employees and it is not normally kept overnight at or near the residence of any employee. The vehicle may be leased, and managed by Facilities, or an external supplier commissioned by Facilities.
- **Company Cars:** A company vehicle that is allocated to an employee and, as such, will be classed as a 'benefit in kind' for the purposes of taxation. In these cases, an organisation is required by HMRC to submit a P11D for each individual with details of their vehicle, mileage travelled and emissions. The P11D can provide a valuable source of information for emissions calculation, and may be held by your Human Resources or Finance Department.
- **Hire Cars:** A vehicle that is rented from a supplier. This may be managed by Procurement or Facilities, but often usage of a hire car is ad hoc and procedures will vary by team.
- **Grey Fleet:** the term grey fleet is used to describe individuals who use their own vehicles for business purposes and are reimbursed by an organisation. Use of own vehicles for business travel will be documented in expense claim forms and can be obtained from your Finance Department.
- **Car Club:** These are vehicles provided by a supplier on a pay-as-you-go basis. This may be managed by Procurement or Facilities. Car Club travel may also be booked on an ad hoc and procedures will vary by team.

- **Taxi:** Taxi travel may be a contract with a taxi supplier. This information may be held by Finance or Procurement. Alternatively some taxi travel may be claimed through expenses or petty cash. Finance may be able to provide a breakdown of taxi travel through these systems.

**Expenses**

**Expenses**

	Expenditure (£)
Expenses	

- 3.6 This section requests information on expenses. Please enter the total expenses bill for all business travel here. This figure should be available from Finance.

**Travel Contracts: Compliance**

**Travel Contracts: Compliance**

	Total Expenditure (£)	Expenditure with Supplier (£)	Percentage Compliance
Air			#DIV/0!
Rail			#DIV/0!
Car Hire			#DIV/0!
Hotels			#DIV/0!

- 3.7 Compliance is the level of adherence to business travel policies and procedures. For example, some organisations require staff to book all travel via a Travel Management Company (TMC), but only about half of staff do so, and the other staff buy their tickets in another way (i.e. via thetrainline.com). Compliance in this instance, therefore will be 50%.
- 3.8 Compliance may be monitored by the department that is responsible for any business travel policies and procedure that are in place at your organisation. This is likely to be within Procurement but other departments such as Human Resources or the Travel Plan Coordinator may also be involved.

**Granularity of Management Information**

**Granularity of Management Information**

	Individual	Business Unit	Cost Centre	Office
Air Travel				
Rail Travel				
Occasional Car User				
Essential Car User				
Pool Cars				
Motorcycle				
Hire Cars				
Taxis				
Public transport				
Hotels				
Expenses				
Meetings				

- 3.9 Using the drop down menus, please indicate whether each specified mode of travel/expenditure can be broken down by individual, business unit, cost centre or office. This information will help to understand the level of information available for designing a bespoke element to the Baselineing process. This level of detail is sometimes requested on expense claim forms and could be provided by your Finance Department.

## Alternatives to Travel

### Alternatives to Travel

	Total Number of Units	Level of Utilisation		Travel Avoided	
		Hours	Number of meetings	Hours	Cost Saving (£)
Videoconferencing					
Tele-presence					
Teleconferencing					
Webconferencing					

	Number of Staff Participating	% of Total Staff Participating
Home working		#DIV/0!
Remote working		#DIV/0!
Flexi working		#DIV/0!
Staggered Hours		#DIV/0!

- 3.10 This section of the tool aims to identify what ATT are currently available at your organisation. In addition this section looks to understand current levels of utilisation and opportunities for further engagement.
- 3.11 The availability and usage levels of your existing facilities that provide ATT are likely to be monitored by your Facilities or Estates department.

## 4 Completing the Baseline Assessment Tool (b)

- 4.1 This worksheet aims to provide information on the types of trips undertaken and the modes of travel frequently used (including the most frequent users of vehicles). Understanding trip type and frequency helps to gain an understanding of general trends.

### Frequent Trip Information

#### Frequent Trip Information

Top 5 Rail Journeys					
Route	Number of Trips	Expenditure (£)	Distance (miles)	Emissions (kg of CO <sub>2</sub> e)	Emissions Sense Check (kg of CO <sub>2</sub> e)
					0.00
					0.00
					0.00
					0.00
					0.00

Top 5 Air Journeys						
Route	Flight Type	Number of Trips	Expenditure (£)	Distance (miles)	Emissions (kg of CO <sub>2</sub> e)	Emissions Sense Check (kg of CO <sub>2</sub> e)
						FALSE
						FALSE
						FALSE
						FALSE
						FALSE

Top 5 Hotel Destinations			
Location	Number of Stays	Expenditure (£)	Emissions (kg of CO <sub>2</sub> e)



- 4.8 To gain an idea of the potential to reduce travel by various types of car use, please also provide an indication of the number of vehicles by type.

## **5 Baseline Assessment Tool (c)**

- 5.1 This section is bespoke and will be designed specifically for the pilot group if they choose to extend their data collection to include other areas. For example, if the project is to focus on a specific department/area, the bespoke section will be designed to facilitate the baselining and monitoring of that specific department/area. The ability to do this will be determined by the granularity of the management information section (see para 4.9).