Technical Standard

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Journey Management		**14**

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Corporate Wide Scope	**Integrity Management: Occupational Health and Safety**

Document Owner (by position):		Project:
Corporate - Occupational Health & Safety – Process Owner		**HOIMS Program**

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Document Purpose

The purpose of this technical standard is to outline the corporate requirements for Journey Management.

This standard provides:

- o Journey management (JM) requirements,
- o Journey planning guidelines, and
- o Tools and processes for identifying and managing hazards when undertaking a journey.

A well-planned and prepared road journey with secured approvals will help the driver arrive safely at the destination.

Document Scope

This standard establishes company-wide criteria for journey management for personnel travelling in vehicles on behalf of Husky.

This standard does not apply to:

- o Regular commuting;
- o Travel not associated with business;
- o Travel via air, water, or train; or
- o Travel using all-terrain vehicles.

Document User Profile

This technical standard applies to all Husky employees and full-time equivalent contractors, with a valid operator's (driver's) license, when travelling by road (vehicle) on approved Husky business outside routine travels.

Husky

Technical Standard Requirements

Husky recognizes that vehicle travel is part of doing business, and these journeys require planning and necessary approvals. Before commencing any journey, safer alternatives to land transportation must be considered (e.g. flying).

Workers should understand their duty to refuse unsafe work as it relates to journey management.

Key elements of Husky Journey Management Program are:
- o Planning the trip;
- o Preparing for the trip;
- o Undertaking the trip, and
- o Completing the trip

1.0 Journey Management Decision Process

Categorize Journey	Journeys can be categorized as one of the following: • Routine, or • Non-routine **Routine:** Travel where a known route is regularly travelled for the purpose of work: • Commuting to or from work in a company vehicle to the regular place of work, • Travel by road in a company vehicle within city or town limits, and • Road conditions and weather are considered normal or as expected for that time of year. • Example: Operator regularly travelling the same route to go from lease to lease **Non-routine:** Journeys which fall outside of the definition of routine journey.
Routine journey	Proceed with journey. • If the driver feels more comfortable, they may opt to use a Journey Management (JM) provider.
Non-routine journey	First, determine if a non-routine journey is necessary to meet business objectives by answering the following questions: • Are non-transportation solutions such as conference calls, Skype meetings, etc. possible? • Are alternative modes of transportation such as travel by air possible?

Non-routine journey necessary	If the non-routine journey is confirmed necessary to meet business objective(s), a risk assessment must be completed by using the Husky Journey Risk Assessment Tool. (See Appendix A)
Journey **Risk Assessment**	The journey risk assessment must be completed for all non-routine journeys.
	Risk assessments must be completed by the driver and reviewed with the direct supervisor.
	Risk is ranked as follows:
	• Low,
	• Medium, or
	• High
Low risk journey	No journey management plan is required.
	Proceed with travel.
Medium risk journey	Journey management plan must be developed and communicated for supervisor approval.
	Journey Management provider must be utilized including check-in.
High risk journey	High risk journey - Travel is not permitted, alternate arrangements or actions must be taken to reduce the risk to medium or low. Consideration must be given to alternate modes of transportation.

2.0 Journey Management Planning

This section applies to medium risk ranked non-routine journeys. All medium risk require a documented journey management plan (JMP).

Important note: The use of In Vehicle Monitoring Devices (IVMD) technology does not constitute a journey management plan (or program). IVMD with Global Positioning System (GPS) capabilities can be a useful tool.

Journey Management Plan (JMP) Development	A documented JMP can be developed and communicated by one of the following means:
	• Calling the applicable JM Provider directly
	• Using the standard corporate Journey Management Plan (JMP) template. The approved plan is then emailed to the JM Provider.
	• Using a corporate approved app, which is communicated directly to the JM Provider.
	• If none of the options are being used within a BU, a JMP must include the following at a minimum:
	▪ Date,
	▪ Planned route,
	▪ Planned stops,
	▪ Timeline (estimated time of arrival),
	▪ Check-in requirements (if traveling in an isolated area),
	▪ Name/contact information of driver and passengers,

- Contact info of person at destination,
- Contact info of driver's supervisor,
- Vehicle details (license plate, model, color), and
- Journey Management provider information.

Trips longer than 6 hours require a minimum trip check-in based on 2 to 3-hour intervals, depending on Journey Management provider and location.

Journey Management Plan (JMP) Review and Approval	Drivers shall: • Determine which process to document & communicate the JMP. • Request approval as close to the travel date as possible. • Communicate any journey delays or changes to supervisor and JM provider. **Important Note:** Supervisor approval must be given prior to using a corporate approved JMP app. Supervisors shall: • Validate the need for vehicle travel, always ensuring that no other alternative mode(s) of travel is available to achieve business objective(s). • Review requests for trip approvals in conjunction with the driver. • Grant final approval or rejection for requested journeys as close to the travel date as possible. When determining their expectations, supervisors shall consider: • Experience of the driver, time of day for the journey, weather and road conditions • Qualifications (training) – ensure drivers are qualified for the journey e.g. valid driver's license, any special requirements like air brake endorsement etc.
Journey Management Plan (JMP) Communication	The journey management plan shall be logged with a JM provider either directly or using a corporate approved app. The JM provider could be an internal or external service to Husky and depend on location; this is determined within the respective Business Units or functional departments. All JM Providers services are 24 hours 7 days a week and will work with Husky Occupational Safety Team to monitor compliance and collect metrics to assess effectiveness.
Journey Preparation	Ensure the vehicle is reliable, well maintained, and appropriate for the planned journey.

Insurance and registration are available.

It is also important to confirm the following:

- Cargo is secure,
- Seasonal restrictions (road bans, restricted travel around holiday weekends, etc.) as identified in the journey management plan, and
- Drivers to consider use of a working alone device when traveling in isolated areas in conjunction with JMP.

3.0 During the Journey

The driver must notify the JM Provider, and other appropriate person(s) if required, when the trip has commenced. If driving conditions deteriorate, the JMP may need to be revisited to respond to changes in road conditions, weather, visibility, and traffic. Drivers must check-in with their JM Provider to advise of delays.

While the journey is underway, the following actions must be completed, as required:

Check-in	Check-in with JM provider at the times identified in the JMP. This can be completed either by calling the JM Provider directly or using the corporate approved app.
Incident Management	An incident must be immediately reported to the driver's direct supervisor and Health and Safety representative according to HOIMS Corporate Incident Management Procedure.
	Supervisors must follow the incident notification guidelines outlined in the HOIMS Corporate Incident Management Procedure.
	Further notification(s) must be made to: • Contact the rental company if applicable, and • Law enforcement if applicable.
Overdue Traveler	An emergency response plan (ERP) shall be initiated as per the JMP, and escalation process followed if: • The driver fails to check-in at the agreed upon required check-in time, or • An in vehicle monitoring device (IVMD) impact alarm is triggered. i.e. Geotab

4.0 Journey Closure

The driver must perform the final check-in with JM provider and close out journey after safe arrival at destinations.

1. Document Development

The BU Process Stewards, Corporate Process Steward and Corporate Process Owner participated in the development of this technical standard, and must be consulted for any interpretation of requirements or application of the content of this document.

2. Implementation and Application

The Corporate Process Steward and Business Unit Process Stewards are responsible to administer and ensure the implementation of the technical standard requirements as described in this document.

3. Resolution of Interpretation and Applicability

Any issues that arise from implementation or application of this technical standard shall be brought to the attention of the BU Process Steward for review and resolution with the Corporate Process Steward and other Business Unit Process Stewards.

The Corporate Process Steward and Business Unit Process Stewards shall have sufficient qualifications, authority and organizational freedom to identify problems, report and investigate deficiencies, and issues relating to the implementation of this technical standard.

Document Updates and Sustainment

The Corporate Process Owner, Corporate Process Steward and Business Unit Process Stewards are responsible to ensure that this technical standard is reviewed within the required review cycle and kept in compliance with any Regulatory requirements that may apply.

Role	Position title	Coversheet approval role
Corporate Process Owner, Occupational Health and Safety	Manager, Occupational Safety	Approver
Quality Assurance	OI Project Coordinator, Governance and Process Improvement	QA Reviewer
Occupational Health and Safety Steward Rep.	Safe Operations Lead, Occupational Safety	Checker
Author / Document Owner	Safety Specialist, Occupational Safety	Originator

Table 1: Document Updates and Sustainment

Definitions and Acronyms

The table format below provides terminology used in this document that needs a more thorough definition.

Term	Definition
High Risk Journey	A non-routine journey that is not permitted based on the assessed level of risk.
In Vehicle Monitoring Device (IVMD)	A device installed in the vehicle that can record journey data for each driver. Data could include speed, harsh acceleration, harsh deceleration, kilometers driven etc.
Journey	The act of traveling from one place to another, especially when involving a considerable distance; a trip. Routine and normal journeys, for example, travel within an operating unit/area, are excluded from this definition. This shall be managed by BU/facility procedures.
Journey Management App	A corporately approved app used to facilitate the Journey Management Process.
Journey Management Plan (JMP)	The JMP is a plan that identifies the specifics for the trip, including driver contact info, destination, duration, route and driver supervisors contact info. **Note:** To use of an approved JMP app certain criteria must be met along with supervisor approval prior to use.
Journey Management Provider	Third party call center manned 24 hours, which collects and records journey information from drivers and tracks their journey to completion. **JM Provider Call in #'s** Western Region: STARS: 1.877.262.2111 Atlantic Region: Telelink: 1.877.777.1117, We An-ser, Blackline Safety Operations Center or internal within Husky etc. **Note:** Tracking devices such as the Blackline Loner are an acceptable solution for tracking a journey (e.g. the check-in process).
Low Risk Journey	A non-routine journey that does not require a journey management plan to be completed based on the assessed risk.
Medium Risk Journey	A non-routine journey that requires supervisor approval and a Journey Management plan to be completed based on the assessed risk.
Non-routine Journey	Journeys which fall outside of the definition of routine journey.
Routine Journey	The route is regularly travelled by the driver at least once per week or shift for the purpose of work and the road conditions and weather are considered normal or as expected for that time of year (e.g. Operator regularly travelling the same route to go from lease to lease). **Note:** Adverse weather conditions (e.g. Environment Canada weather watch or warning) are not considered normal and are therefore a deviation from routine travel, journey risk assessment should be completed.

Table 2: Terms and Definitions

Governing and Reference Documents

1. Governing Documents

The following documents should be referenced to provide internal governing and external regulatory context for the content of this document.

Document Type	Document Title
Corporate Procedure	Corporate Vehicle Safety
Corporate Standard	Risk Management

Table 3: Governing Documents

2. Reference Documents

The following documents should be referenced to provide context for the content of this document.

Document Type	Document Title
Risk Assessment Tool	Corporate Journey Risk Assessment Tool
JMP	Corporate Journey Management Plan
Recommended Practice	OGP 365: Land transportation safety recommended practice, Sept 2014
Recommended Practice	IPIECA: Travel Guide: Health and Safety for the Oil & Gas Professional
Husky Program	Work Safe Drive Safe Program
Technical Standard	Hazard Assessment
Technical Standard	Corporate Fleet (Vehicle) Practice
Corporate Procedure	Working Alone
Husky Program	International SOS
Corporate Procedure	Incident Management Procedure

Table 4: Versioning History

Appendix - A   Accountability and Role Assignment Guide

Accountability Role Assignment Considerations

The assignment of positions for new roles identified by this technical standard is very dependent on the Organizational scope of the document. The role assignment tables in this section indicate how (on what basis) a role is to be assigned and does not list the actual responsibilities of any particular role. The columns should be completed as follows:

- o **Role** - the roles as introduced by this document,
- o **Assignment considerations** - the specific skills, expertise, competence, and knowledge required from an individual to fulfil the role as intended within the context of this document, and
- o **Possible positions** - the existing positions/ job titles in Husky that would have the required level of competence to fulfil the role within the context of this document.

General Role Assignment Guidelines

This table contains role assignment guidelines applicable to the same role repeated within this technical standard.

Role	Assignment Considerations	Possible Positions
Driver	Assigned role of driver if required to complete a journey.	Any Husky Personnel
Supervisor	Drivers direct supervisor or manager	Site-supervisor, Site- superintendent, Managers, etc.

Table 5: Versioning History

Appendix - B   Corporate Journey Risk Assessment Tool

This tool does not encompass all driving hazards. It is the responsibility of the driver to make an educated decision on whether road travel is acceptable.

This form can also be accessed via the following link: Corporate Journey Risk Assessment Tool

		Low	Medium	High
1.	How far is your intended journey?	< 2 hours	2-6 hours	>6 hours
2.	Are you familiar with the route?	Familiar or GPS available	Somewhat familiar	Unfamiliar
3.	What time of day will be the majority of your journey?	Day	Dusk or Dawn	Night
4.	Are you travelling alone?	No	Yes	
5.	Highway type for the majority of the journey?	Primary/Secondary	Gravel Roads	Radio controlled Ice roads Forestry Roads
6.	Road/ Weather Conditions (including outside temperature)	Normal for time of the year OR bare road conditions	Fair for time of the year OR partial snow and ice covered	Poor for time of the year, total snow covered. -30c or colder
7.	Vehicle type & Condition (4x4 or not, Tires, brakes, windshield, lights etc.)	Good	Fair	Poor (vehicle shouldn't be used)
8.	GPS Enabled IVMD?	Yes	No	No
9.	Have you driven this type of vehicle before?	Frequently	Once	Never
10.	Have you had adequate sleep in the last 24 hours?	>6 hours	4-6 hours	<4 hours
11.	How many hours awake at the end of the journey?	≤14 hours	>14hours	
12.	Will you have cellular service for the duration of the journey?	Yes	Intermittent	No
	Total (selections/column)			

3 or less yellow	Low Risk Journey - A Journey Management Plan does not need to be completed
4 or more yellow (or, 3 yellow + 1 red; or, 2 yellow + 2 red)	Medium Risk Journey – Supervisor approval required; A Journey Management Plan must be completed and communicated (may be done with the assistance of a 3rd party JM provider).
3 or more red	High risk journey - Travel is not permitted, alternate arrangements or actions must be taken to reduce the risk to medium or low.

Appendix - C   Versioning History

Revision Number	Date (drop down pick list)	Reason for Change – highlight what changed in document
0.1 (Draft)	23 October 2014	*Issued for QA review*
0.2	7 April 2015	• Changed document type from procedure to technical standard • Updated document as per comments from review session *Issued for approval*
0.3	25 May 2015	• Updated Purpose, Scope, and Overview • Replaced Hazard/Risk Assessment table with Journey risk factors, now located in Appendix C (as a sample) along with the clarification table • Moved Journey Management up to follow after hazard assessment *Updated Journey Management flow diagram along with the clarification table*
1.0	27 May 2015	*Issued for use*
1.1	29 September 2015	*Added links of referenced Technical Standards*
1.2	7 June 2017	*Rewrite of the complete Standard*
2.0	12 June 2017	*Issued for use*
2.1	23 June 2017	*Minor word changes and reference to emergency journeys in section 3.1 removed.*
3.0	28 June 2017	*Issued for use*
3.1	16 Sept 2019	• Issued for Review • Updated to include usage of corporate approved app • Included section under reference documents *Changes to JMP Risk levels & required actions*
4.0	9 Oct 2019	*Issued for use*

Table 6: Versioning History