

Transport Booking Policy and Procedure

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1	POLICY
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1.1 **Purpose**

The Transport Booking Policy and Procedure has been established to ensure that:

- a) There is no use of transport for Council activities which has not been properly authorised in line with the Procurement and Contract Standing Orders and Purchase to Payment Policies.
- b) Any Operator used by the Council complies with all regulatory requirements.
- c) That the Passenger Transport Unit (PTU) has full visibility of all transport requirements across the Council.

1.2 **Definitions**

For the purposes of this document, the following meanings apply:

- a) "Transport" means any form of passenger transport required for Council activities. This includes taxis, accessibility vehicles, mini-buses and coaches.
- b) "Council activities" means any activities for which the Council is responsible and for which the Council has a duty of care to users of the service. This includes, for example, home to school transport, school excursions, Social Work Transport and Additional Needs (SAN) transport.
- c) "Operator" means the individual or organisation that supplies the transport, i.e. the taxi or bus firm.
- d) "PVG" means the Protecting Vulnerable Groups scheme
- e) "PTU" means the Council's Passenger Transport Unit

1.3 **Duty of Care**

- a) The Council has a duty of care towards service users of Transport which has been provided and paid for by the Council.
- b) This duty of care includes additional regulatory and policy requirements over and above those that must be met by any general supplier of goods or services to the Council. This includes (or may include):
 - An Operator's License appropriate to and for the number and size of vehicles to be operated
 - Drivers and passenger assistants are PVG scheme members through their current employer and have had their criminal record checked
 - Special requirements for the vehicle (e.g. low floor access, tail lifts, webbing for restraining wheelchairs, child seats, safety belt requirements) which comply with the Public Service Vehicle Accessibility Regulations 2000, Lifting Operations and Lifting Equipment Regulations 1998, and Equality Act 2010.
- c) It is necessary therefore that any new Operators requested directly by Council services are fully checked and approved before any Transport is booked.
- d) PTU is best placed to carry out these checks and consequently any new Operators must therefore be approved by them prior to use.

1.4 **Procurement Policy Compliance**

- a) Any Transport bookings must be properly authorised in line with the Procurement and Contract Standing Orders and Purchase to Payment Policy, both available on the intranet.
- b) It should be noted in particular that the Council's Purchase to Payment Policy does **NOT** permit retrospective ordering (i.e. raising a PO to pay an invoice after the fact).

2 NEW OPERATOR PROCEDURE

2.1 Procedure

- a) Council officers may request that a new Operator is added to Business World in the normal way via the New Supplier Request form. Guidance on the New Supplier Request form is available on the intranet.
- b) The New Supplier Request will workflow to procurement for review. Procurement will refer the request to PTU for approval by emailing ptucompliance@scotborders.gov.uk

PTU may request further information from the officer before authorising the request to proceed. This could include, for instance, the reason for raising the request, why an existing, pre-approved Operator could not be used, etc.

PTU will carry out a series of checks on the proposed Operator to ensure that they comply with all regulatory and policy requirements (e.g. Operators License, PVG). The operator will be required to accept the conditions of contract set out by the Community Planning Partnership. Note that these checks may take up to 20 working days so requests should be submitted well in advance of the date the transport is required.

PTU will notify procurement of the outcome to procurement via procurement@scotborders.gov.uk, the request will either be approved or rejected in Business World.

If rejected, procurement will give the reason that PTU has declined to approve the Operator.

If approved, the request will workflow to Accounts Payable who will set up the new supplier within 5 working days. Any queries about this stage should be directed to vendors@scotborders.gov.uk.

2.2 Retrospective Ordering

It should be noted that raising a retrospective order **must under no circumstances** be used as a means to bypass this procedure.

3	TRANSPORT BOOKING PROCEDURE
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3.1 Procedure

- a) Service identifies a requirement to provide Transport.
- b) For Transport requirements identified more than 28 days in advance, the Service should submit a Transport Request Form to PTU, including dates, times and number of people travelling. [Transport Booking Request Form - School Trips – Fill in form](#). PTU will only download the requests on a weekly basis (Mondays).
- c) Schools are then not permitted to contact operators to request transport for the same trip.
- d) PTU will evaluate the request and invite operators to tender for the services required. When submitting your price, please state cost of Vat if applicable. Operators will be asked to hold the request in their diaries for 2 working days until PTU confirm or decline the booking.
- e) PTU will evaluate tender submissions, inform the requester of the cost for approval, school should advise whether the transport should be confirmed or not within 2 working days, once approval has been received PTU will award the contract. PTU will inform the Service of the successful bidder, and price and the requester will raise a PO for the tendered amount.
- f) For Transport required within 28 days, the Service should book transport directly with an operator. Where at all possible, the operator should be selected from the list of approved operators. To request this list, emailpttuexcursions@scotborders.gov.uk.
- g) If there is a requirement to use an operator out with the approved operator list, then a new operator may be requested via the New Operator Procedure noted above.
- h) If transport is no longer required, this **must** be cancelled with the operator and PTU as soon as possible. Failure to cancel transport with 2 full working days' notice will result in 50% of the cost of transport to be paid. If the trip is cancelled whilst the operator is on route, on the day of the journey, full payment will be required.