

## GUIDELINES FOR DUAL-PURPOSE AND MULTI-PURPOSE TRAVEL

### Introduction

This procedural guidance applies to all University Travellers (defined as anyone participating in university-sponsored travel activities) including all permanent, fixed term or temporary staff, faculty, students, visitors, guests, and other non-University personnel who have been authorised and/or directly funded to travel on behalf of the University. This includes adjunct staff, casual employees, post-doctoral fellows, research assistants, teaching fellows, visiting academic staff, graduate assistants, tutors, senior tutors, and research officers.

### Types of Travel

**University-sponsored Travel** includes all activity days that deliver a benefit to the university, which includes travel and recovery days. University-sponsored Travel can be done by foot, bicycle, scooter, automobile, train, boat, bus, airplane, ship, or other means, with or without luggage, and can be one way or round trip. Travel is most often conducted to reach a distant location, but travel can also include single or successive activities within short distances.

**Multi-Purpose Travel** is defined as university-sponsored travel that combines more than one travel activity associated to more than one Massey initiative, event, goal, or business objective (e.g., University Traveller attends a conference overseas in location their research project is being conducted).

The University acknowledges that University Travellers may elect to book Personal Travel days in conjunction with university-sponsored travel. When this occurs, it is considered Dual-Purpose Travel.

**Dual-Purpose Travel** is defined as a combination of university-sponsored travel and private/personal travel conducted within the same journey/travel itinerary. Dual-Purpose Travel consists of university-sponsored travel and Personal Travel

Personal Travel occurs when a personal/private portion of a journey is combined with, University-sponsored travel. The University acknowledges that University Travellers may elect to book private/personal travel days in conjunction with university-sponsored travel.

**Personal Travel** is generally supported where the University Traveller pays for all private costs relating to the Personal Travel portion (and any excess airfare or transport cost differential caused solely by adding a Personal Travel component to a university-sponsored travel booking (i.e., the personal/Personal Travel component must not be paid from university funds). The University Traveller is responsible for ensuring they have personal travel insurance coverage for the personal days of their travel, including travel insurance to cover them on personal weekends and holidays during any Dual-Purpose travel journey.

For cases of Personal Travel, the following applies:

- Air and ground transportation costs related to the initial journey to and from the University-sponsored travel destination will be funded by the University.
- Air and ground transportation to other destinations (non-University-sponsored travel locations) are the University Traveller's responsibility to fund.
- The University Traveller is responsible of arranging and paying for their own personal travel insurance for personal travel days including weekend and holidays (excluding stipulations listed below).

- All other expenses associated to Personal Travel days are the University Traveller's responsibility to fund. This includes any additional cost of airfare to accommodate a return journey that includes a Personal Travel destination (i.e., if the airfare for the journey costs more when Personal Travel days are included in the itinerary than without). In these cases, the University Traveller must reimburse the University for the cost differential in the airfare.
- Methods of transportation and accommodation for university-sponsored travel time must be booked through the university's TMC. Any Personal Travel bookings should be communicated to the University Traveller's manager to ensure the University can fulfil any duty of care responsibilities that the University has for University Travellers on Dual-Purpose travel journeys.

### **Treatment of weekends during travel**

The treatment of weekends will depend on where the weekend occurs during a trip. Where a traveller arrives at their destination on the Saturday before a conference/meeting commencing on Monday, the weekend will be considered days in transit if the travel time from departure airport to destination airport is more than 8 hours (this allows travellers to arrive at overseas destinations with time to adjust, otherwise known as travel recovery time).

Where the weekend is in-between two business events (such as a conference ending on Friday and a business meeting on Monday), the weekend will be considered University-sponsored travel.

Where the weekend is at the end of the University-sponsored travel (either before returning home or beginning Personal Travel) the weekend will be considered in-transit or personal time in accordance with these guidelines.

### **Fringe Benefit Tax considerations**

As the University does not pay for any expenses relating to the personal component of a trip, Fringe Benefit Tax (FBT) is not applicable to travel expenses.

### **EXAMPLE 1: Multi-Purpose Travel including Personal Travel**

A University Traveller is heading to the United States for University business. Their Senior Leadership Team (SLT) member has approved their attendance at a conference in Chicago, which is not available to attend virtually. The University Traveller has subsequent work with research colleagues at the Michigan State University. Both components of the travel are University related and will deliver distinct benefits and outcomes to the University.

The University Traveller's itinerary is drafted as the following:

- Day 1: one day in transit to fly from Palmerston North to Auckland to Chicago via Houston (day in transit).
- Day 2: one travel recovery day (day in transit).
- Days 3-5: three-day conference in Chicago, at which they are a presenter.
- Days 6-8: three days of collaborator meetings/workshops at Michigan State University (includes travel from Chicago to Michigan).
- Day 9: one day travel to fly from Chicago to Auckland (via Los Angeles) and onward to Palmerston North (day in transit).

- Day 10: one travel recovery day (day in transit).

*Rather than returning to New Zealand on Day 9, the University Traveller would like to include some private days as part of this trip, being:*

- two days (private) around Lake Michigan area,
- three days (private) in Chicago, and
- four days (private) in California.

To include these additional private days the University Traveller's itinerary is updated as the following:

- Day 20 (original Day 9): one day travel from Los Angeles to Auckland and onward to Palmerston North.
- Day 21 (original Day 10): one travel recovery day (day in transit).

The final University-sponsored itinerary and University funding covers only the below dates:

- Day 1: one day in transit to fly from Palmerston North to Auckland to Chicago via Houston (day in transit).
- Day 2: one travel recovery day (day in transit).
- Days 3-5: three-day conference in Chicago at which they are a presenter.
- Days 6-7 – weekend days in transit before work at Michigan State University
- Days 8-10: three days of collaborator meetings/workshops at Michigan State University (includes travel from Chicago to Michigan).
- Day 20: one day travel from Los Angeles to Auckland and onward to Palmerston North.
- Day 21: one travel recovery day (day in transit).

In the above instance, the Personal Travel during Days 11 – 19 is considered Personal Travel and the University can fully fund the air travel and ground transport costs to and from the country of the University-sponsored travel location (s). Any other expenses associated to the personal portions of this trip will not be funded by Massey.

The University Traveller is required to comply with the University Travel Policy and associated procedural guidance. As the overseas journey includes a university-funded portion all significant travel bookings related to the University-sponsored travel dates (transport and accommodations) must be booked through the University's TMC. Staff are encouraged to utilise the services of the TMC for their personal travel bookings.

The following table shows a calendar of this trip example:

**EXAMPLE 1 CALENDAR: Multi-Purpose Travel including Personal Travel**

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
1-May	2-May	3-May	4-May	5-May	6-May	7-May
University-Purpose Travel	University-Purpose Travel	University-Purpose Travel	University-Purpose Travel	University-Purpose Travel	University-Purpose Travel	University-Purpose Travel
PN to Chicago	Recovery Day In Transit	Chicago conference	Chicago conference	Chicago conference	Day in Chicago before University work in Michigan	Michigan for work in the morning
University Expense (Massey covers air/ground transport costs)	University Expense	University Expense	University Expense	University Expense	University Expense	University Expense
8-May	9-May	10-May	11-May	12-May	13-May	14-May
University-Purpose Travel	University-Purpose Travel	University-Purpose Travel	Incidental Personal Travel	Incidental Personal Travel	Personal Weekend Day	Personal Weekend Day
Work at Michigan State University	Work at Michigan State University	Work at Michigan State University	Michigan Tourism	Michigan Tourism	Chicago Tourism	Chicago Tourism
University Expense	University Expense	University Expense	Individual Massey Traveller Expense including travel insurance arrangements	Individual Massey Traveller Expense including travel insurance arrangements	Individual Massey Traveller Expense including travel insurance arrangements	Individual Massey Traveller Expense including travel insurance arrangements
15-May	16-May	17-May	18-May	19-May	20-May	21-May
Incidental Personal Travel	Incidental Personal Travel	Incidental Personal Travel	Incidental Personal Travel	Incidental Personal Travel	University-Purpose Travel	University-Purpose Travel
Chicago to California travel	California Tourism	California Tourism	California Tourism	California Tourism	Los Angeles to PN	Travel Recovery Day in Transit
Individual Massey Traveller Expense including travel insurance arrangements	Individual Massey Traveller Expense including travel insurance arrangements	Individual Massey Traveller Expense including travel insurance arrangements	Individual Massey Traveller Expense including travel insurance arrangements	Individual Massey Traveller Expense including travel insurance arrangements	University Expense (Massey covers air/ground transport costs)	University Expense (until at home location)

**EXAMPLE 2: Dual-Purpose Travel including Personal Travel**

Example 2 is like example 1 but is a Dual-Purpose Travel and not a Multi-Purpose Travel.

A University Traveller is heading to the United States for University business. Their SLT member has approved their attendance at a conference in Chicago. The conference is not available to attend virtually and attendance by the University Traveller will deliver distinct benefits to the goals of the University.

The University Traveller's itinerary is drafted as:

- Day 1: one day in transit to fly from Palmerston North to Auckland to Chicago via Houston (day in transit).
- Day 2: one travel recovery day (day in transit).
- Days 3-5: three-day conference in Chicago.
- Day 6: one day travel to fly from Chicago to Auckland (via Los Angeles) and onward to Palmerston North (day in transit).

- Day 7: one travel recovery day (day in transit).

*Rather than returning to New Zealand on Day 6, the University Traveller would like to include four days Personal Travel in Chicago as part of this trip.*

To include these additional private days, the University Traveller's itinerary is updated as the following:

- Day 10 (original Day 6): one day travel from Los Angeles to Auckland and onwards to Palmerston North.
- Day 11 (original Day 7): one travel recovery day (day in transit).

The final University-sponsored itinerary and University funding covers only the below dates:

- Day 1: one day in transit to fly from Palmerston North to Auckland to Chicago via Houston (day in transit).
- Day 2: one travel recovery day (day in transit).
- Days 3-5: three-day conference in Chicago.
- Day 10: one day travel from Los Angeles to Auckland and onwards to Palmerston North.
- Day 11: one travel recovery day (day in transit).
- In the above instance, the Personal Travel during Days 6 – 9 is considered Personal Travel and the University can fully fund the air travel and ground transport costs to and from the country of the University-sponsored travel location(s). Any other expenses associated to the personal portions of this trip will not be funded by Massey.
- The University Traveller is required to comply with the University Travel Policy and associated procedural guidance. As the overseas journey includes a university-funded portion all significant travel bookings related to the University-sponsored travel dates (transport and accommodations) must be booked through the University's TMC. Staff are encouraged to utilise the services of the TMC for their personal travel bookings.

The following table shows a calendar of this trip example:

**EXAMPLE 2 CALENDAR: Dual-Purpose Travel including Personal Travel**

1-May	2-May	3-May	4-May	5-May	6-May	7-May
University-Purpose Travel	University-Purpose Travel	University-Purpose Travel	University-Purpose Travel	University-Purpose Travel	Personal Weekend Day	Personal Weekend Day
PN to Chicago	Recovery Day In Transit	Chicago conference	Chicago conference	Chicago conference	Personal Weekend Day	Personal Weekend Day
University Expense (Massey covers air/ground transport costs)	University Expense	University Expense	University Expense	University Expense	Individual Massey Traveller Expense including travel insurance arrangements	Individual Massey Traveller Expense including travel insurance arrangements
8-May	9-May	10-May	11-May	12-May	13-May	14-May
Incidental Personal Travel	Incidental Personal Travel	University-Purpose Travel	University-Purpose Travel	Regular Work Day	Personal Weekend Day	Personal Weekend Day
HOLIDAY LEAVE	HOLIDAY LEAVE	Chicago to PN	Recovery Day In Transit	Regular Work Day	Personal Weekend Day	Personal Weekend Day
Individual Massey Traveller Expense including travel insurance arrangements	Individual Massey Traveller Expense including travel insurance arrangements	University Expense	University Expense	Regular Work Day	Personal Weekend Day	Personal Weekend Day

**EXAMPLE 3: Multi-Purpose Travel including separate personal holiday (Personal Travel)**

Assume the same circumstances as example 1.

The University Traveller's itinerary is drafted as:

- Day 1: one day in transit to fly from Palmerston North to Auckland to Chicago via Houston (day in transit).
- Day 2: one travel recovery day (day in transit).
- Days 3-5: three-day conference in Chicago at which they are a presenter.
- Days 6-7 – weekend days in transit before work at Michigan State University
- Days 8-10: three days of collaborator meetings/workshops at Michigan State University (includes travel from Chicago to Michigan).
- Day 11: one day in transit to fly from Chicago to Los Angeles to Auckland and onwards to Palmerston North (day in transit).
- Day 12: one travel recovery day (day in transit).

The University Traveller would like to take three weeks leave in the United States, after completing their authorised University sponsored travel in Chicago and at the Michigan State University. This change means 21 days out of a total 32-day journey will be personal travel.

The final University-sponsored itinerary and University funding covers only the below dates:

- Day 1: one day in transit to fly from Palmerston North to Auckland to Chicago via Houston (day in transit).

- Day 2: one travel recovery day (day in transit).
- Days 3-5: three-day conference in Chicago at which they are a presenter.
- Days 6-10: four days of transit and collaborator meetings/workshops at Michigan State University (includes driving time from Chicago to Michigan and back).
- Day 31: one day travel to fly from Chicago to Auckland (via Los Angeles) and onward to Palmerston North (day in transit).

Day 32: one travel recovery day (day in transit). In the above instance, the Personal Travel during Days 11 – 30 is considered Personal Travel and the University can fully fund the air travel and ground transport costs to and from the country of the University-sponsored travel location(s). Any other expenses associated to the personal portions of this trip will not be funded by Massey.

The University Traveller is required to comply with the University Travel Policy and associated procedural guidance. As the overseas journey includes a university-funded portion all significant travel bookings related to the University-sponsored travel dates (transport and accommodations) must be booked through the University's TMC. Staff are encouraged to utilise the services of the TMC for their personal travel bookings.

The following table shows a calendar of this trip example:

*EXAMPLE 3 CALENDAR: Multi-Purpose Travel including separate personal holiday (incidental Personal Travel)*



Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
1-May	2-May	3-May	4-May	5-May	6-May	7-May
University-Purpose Travel	University-Purpose Travel	University-Purpose Travel	University-Purpose Travel	University-Purpose Travel	University-Purpose Travel	University-Purpose Travel
PN to Chicago	Recovery Day In Transit	Chicago conference	Chicago conference	Chicago conference	Day in Chicago before University work in Michigan	Travel to Michigan for work in the morning
University Expense (Massey covers air/ground transport costs)	University Expense	University Expense	University Expense	University Expense	University Expense	University Expense
8-May	9-May	10-May	11-May	12-May	13-May	14-May
University-Personal Travel	University-Personal Travel	University-Personal Travel	Incidental Private Travel	Incidental Private Travel	Personal Weekend Day	Personal Weekend Day
Work at Michigan State University	Work at Michigan State University	Work at Michigan State University	HOLIDAY LEAVE	HOLIDAY LEAVE	Personal Weekend Day	Personal Weekend Day
University Expense	University Expense	University Expense	Individual Massey Traveller Expense including travel insurance arrangements	Individual Massey Traveller Expense including travel insurance arrangements	Individual Massey Traveller Expense including travel insurance arrangements	Individual Massey Traveller Expense including travel insurance arrangements
15-May	16-May	17-May	18-May	19-May	20-May	21-May
Incidental Private Travel	Incidental Private Travel	Incidental Private Travel	Incidental Private Travel	Incidental Private Travel	Personal Weekend Day	Personal Weekend Day
HOLIDAY LEAVE	HOLIDAY LEAVE	HOLIDAY LEAVE	HOLIDAY LEAVE	HOLIDAY LEAVE	Personal Weekend Day	Personal Weekend Day
Individual Massey Traveller Expense including travel insurance arrangements	Individual Massey Traveller Expense including travel insurance arrangements	Individual Massey Traveller Expense including travel insurance arrangements	Individual Massey Traveller Expense including travel insurance arrangements	Individual Massey Traveller Expense including travel insurance arrangements	Individual Massey Traveller Expense including travel insurance arrangements	Individual Massey Traveller Expense including travel insurance arrangements
22-May	23-May	24-May	25-May	26-May	27-May	28-May
Incidental Private Travel	Incidental Private Travel	Incidental Private Travel	Incidental Private Travel	Incidental Private Travel	Personal Weekend Day	Personal Weekend Day
HOLIDAY LEAVE	HOLIDAY LEAVE	HOLIDAY LEAVE	HOLIDAY LEAVE	HOLIDAY LEAVE	Personal Weekend Day	Personal Weekend Day
Individual Massey Traveller Expense including travel insurance arrangements	Individual Massey Traveller Expense including travel insurance arrangements	Individual Massey Traveller Expense including travel insurance arrangements	Individual Massey Traveller Expense including travel insurance arrangements	Individual Massey Traveller Expense including travel insurance arrangements	Individual Massey Traveller Expense including travel insurance arrangements	Individual Massey Traveller Expense including travel insurance arrangements
29-May	30-May	31-May	1-Jun	2-Jun	3-Jun	4-Jun
Incidental Private Travel	Incidental Private Travel	Incidental Private Travel	University-Purpose Travel	University-Purpose Travel	Personal Weekend Day	Personal Weekend Day
HOLIDAY LEAVE	HOLIDAY LEAVE	HOLIDAY LEAVE	Travel Day back to NZ	Recovery Day In Transit	Personal Weekend Day	Personal Weekend Day
Individual Massey Traveller Expense including travel insurance arrangements	Individual Massey Traveller Expense including travel insurance arrangements	Individual Massey Traveller Expense including travel insurance arrangements	University Expense	No Expense	Personal Weekend Day	Personal Weekend Day



**EXAMPLE 4: Dual-Purpose Travel including separate personal holiday (Personal Travel), travel starting on a Saturday for short flight**

A University Traveller is heading to Sydney, Australia for University business. They are travelling to attend a 2-day conference, the relevant SLT member has confirmed there will be distinct benefits to the University's goals derived from conference attendance and the conference is not available for virtual attendance. The University Traveller is electing to depart on a Saturday. The travel time between the University Traveller's arrival at the departure airport (Wellington) to their arrival at their destination airport (Sydney) is less than 8 hours. Therefore, they will not have an additional day in transit/recovery day.

Their university-sponsored itinerary is drafted as:

- Day 1: one day in transit to fly from Wellington to Sydney (less than 8 hours airport-to-airport).
- Day 2: personal travel/weekend day.
- Days 3-4: – two-day conference in Sydney.
- Day 5 – 1 day in transit to fly from Sydney to Wellington (less than 8 hours airport-to-airport).

*Rather than returning to New Zealand on Day 5, the University Traveller wishes to stay in Australia for an additional five days of personal travel time to visit friends in Australia. This change means 6 days out of a total 10-day journey will be personal travel.*

The final University-sponsored itinerary and University funding covers only the below dates:

- Day 1: one day in transit to fly from Wellington to Sydney (less than 8 hours airport-to-airport).
- Day 2: personal travel/weekend day.
- Days 3-4: two-day conference in Sydney.
- Day 10: 1 day in transit to fly from Sydney to Wellington (less than 8 hours airport-to-airport).

In the above instance, the Personal Travel during the 6 days is considered Personal Travel and the University can fully fund the air travel and ground transport costs to and from the country of the University-sponsored travel location(s). Any other expenses associated to the personal portions of this trip will not be funded by Massey.

The University Traveller is required to comply with the University Travel Policy and associated procedural guidance. As the overseas journey includes a university-funded portion all significant travel bookings related to the University-sponsored travel dates (transport and accommodations) must be booked through the University's TMC. Staff are encouraged to utilise the services of the TMC for their personal travel bookings.

The following table shows a calendar of this trip example:

**EXAMPLE 4 CALENDAR: Dual-Purpose Travel including separate personal holiday (Personal Travel)**

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
1-May	2-May	3-May	4-May	5-May	6-May	7-May
Regular Work Day	Regular Work Day	Regular Work Day	Regular Work Day	Regular Work Day	University-Purpose Travel	Personal Weekend Day
Regular Work Day	Regular Work Day	Regular Work Day	Regular Work Day	Regular Work Day	Welly to Sydney	Personal Weekend Day
Regular Work Day	Regular Work Day	Regular Work Day	Regular Work Day	Regular Work Day	University Expense (Massey covers air/ground transport costs)	Individual Massey Traveller Expense including travel insurance arrangements
8-May	9-May	10-May	11-May	12-May	13-May	14-May
University-Purpose Travel	University-Purpose Travel	Incidental Personal Travel	Incidental Personal Travel	Incidental Personal Travel	Personal Weekend Day	Incidental Personal Travel
Sydney Conference	Sydney Conference	HOLIDAY LEAVE	HOLIDAY LEAVE	Sydney to Welly	Personal Weekend Day	Sydney to Welly
University Expense	University Expense	Individual Massey Traveller Expense including travel insurance arrangements	Individual Massey Traveller Expense including travel insurance arrangements	Individual Massey Traveller Expense including travel insurance arrangements	Personal Weekend Day	Individual Massey Traveller Expense including travel insurance arrangements

Note: the same requirement would apply in Example 4 if the University-sponsored travel destination was a domestic location, such as Auckland, for a staff member living in Levin. If the University Traveller living in a different region of New Zealand travels for business to another region but elects to take holiday leave on either side of the business component of the travel (equal to or greater than the University-sponsored portion of the journey), then it would follow the same procedure as the scenario above.

The locations in the above scenarios only serve as examples of how the apportionment of travel days is calculated and managed.

## Definitions, Terms, Acronyms

Domestic Travel	All travel within New Zealand.
Dual-Purpose Travel (DPT)	Defined as a combination of part University-sponsored travel and part private/personal travel. DPT is permitted provided the Massey travel is in accordance with this procedure and the Massey Travel Policy.
Ground Transport	Massey Fleet vehicles, rental cars, taxis, rail, buses, and transfer shuttles.
Personal Travel (IPT)	Personal Travel is private/personal travel conducted in conjunction with university-sponsored travel when University-travel is the primary purpose for the travel ('primary' is determined as the majority portion of travel time/days)
International Travel	All travel outside New Zealand.
University Traveller (s)	Defined as anyone participating in university-sponsored travel activities (including all permanent, fixed term or temporary staff, faculty, students, visitors, guests, and other non-university personnel who have been authorised and directly funded to travel on behalf of the university. This includes adjunct staff, casual employees, post-doctoral fellows, research assistants, teaching fellows, visiting academic staff, graduate assistants, tutors, senior tutors, and research officers).
Multi-Purpose Travel (MPT)	Defined as University sponsored travel that combines more than one travel activity associated to more than one Massey initiative, event, goal, or business objective (e.g., University Traveller attends a conference overseas in location their research project is being conducted).
SLT	Senior Leadership Team.
Travel Management Company (TMC)	The University is contracted with to provide Massey staff and representatives travel booking services provider.
University-sponsored travel	Travel funded by the University in part or whole to achieve the goals, objectives and strategies of the University, College, Unit and/or the professional and career development of the University Traveller