

TRAVEL POLICY

Section	Travel and Transport
Contact	Strategic Procurement and Contracts Office (SPCO)
Last Review	November 2023
Next Review	November 2026
Approval	SLT 23/10/105
Effective Date	20 November 2023

Purpose:

This policy, and the associated procedural guidance, sets out the University's requirements regarding all University-sponsored travel.

The objectives of the policy are to:

- specify the principles governing University-sponsored travel.
- ensure that expenditure on travel includes only the necessary and reasonable costs incurred and represents value for money for genuinely required travel in a manner that avoids unnecessary or excessive travel expenditure.
- ensure travel risks are identified, managed and the University's duty of care is maintained.
- better manage the University's carbon emissions and the associated environmental impacts of travel activities.
- support equity of access to travel.
- ensure compliance with external and internal requirements to make certain University-sponsored travel and related activities are properly planned, approved, purchased, and paid in accordance with Massey policies; and
- support the safety, wellbeing, and reasonable comfort of those travelling on university business.

In facilitating University-sponsored travel, the University is committed to:

- maintaining its duty of care for staff and students.
- achieving value for money in relation to travel expenditure.
- supporting University strategies and growth.
- supporting and progressing staff careers and opportunities.
- minimising the environmental impact of travel; and
- meeting its legal and tax obligations.

It is the University's responsibility to provide access to the policy and supporting procedural guidance, and it is the University Traveller's (anyone participating in university-sponsored travel activities) responsibility to comply with this policy.

For travel to be funded and sponsored by the University, it must have a **defined** benefit that **contributes to achieving the goals of the University.**

Why this Policy is Needed

The University acknowledges the importance of staff undertaking research, teaching, study, and professional and organisational duties beyond their home location (normal work location or place of residence). These duties contribute to their research work, assist them to maintain and develop their teaching and academic career and can contribute to the overall standing and reputation of the University. Similarly professional services staff contribute to the work of the University and will have specific travel needs related to their roles and professional development. These activities are a form of duty to the University and are granted for those purposes that are consistent with the basic purposes for which the University is constituted.

The University also recognises the need for students to travel to undertake internships or research as part of their authorised studies or to participate in travel associated to student organisations of Massey University. The University has a duty to take reasonable care for the safety and welfare of students when authorising travel for university-approved activities that are part of their enrolment as a Massey University student.

Scope

This policy applies to all **University Travellers and Travel Approvers** (defined as anyone participating in, or approving, 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. 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.

For travel to be funded and sponsored by the University, it must have a defined benefit that contributes to achieving the goals of the University, College, Unit and/or individual.

All Massey-related travel decisions and planning must be climate-conscious, guided by the environmental impact of how we get to our destination and our actions once we are there, and weighed against the expected benefits of such travel.

Each application for travel is determined on its merits. There is no automatic entitlement to the provision of time away from the University in accordance with these provisions. The University reserves the right to deny any travel request that does not meet the University's needs, contractual obligations or budget constraints. Managers may elect to impose stricter budgetary controls over travel expenditures than those required by this policy.

Grants received by the University from external parties are considered to be University funds and must be administered in accordance with this policy and any contractual terms and conditions. In cases where a grant's projected budget includes travel and associated expenses, e.g., airfares or accommodation that have been justified and approved pre-award, this contractual obligation will be observed post-award. In cases where a grant has specific terms and conditions or compliance requirements that are stricter than this policy the terms and conditions or compliance requirements of the grant supersede this policy.

This policy is not to be considered in isolation. It is to be read in conjunction with all related policies and other documents, including, but not limited to, those specifically listed in the body of this policy. Please refer to the Vehicle Management Policy for information related to Massey vehicle fleet bookings.

University-sponsored travel

University-sponsored travel includes all travel conducted on behalf of the University irrespective of the funding source. With contributions to the University as a prerequisite, University-sponsored travel includes, but is not limited to, the following travel purposes:

- attendance at conferences to promote and/or present research to wider audiences to contribute to global knowledge.
- attendance at conferences/workshops/training for professional development directly related to making future contributions to the University.
- delivering a speech or lecture for university purposes that cannot be effectively delivered virtually.
- research related travel including early career research.
- contractual commitments
- academic meetings
- fieldwork for research
- internships
- recruitment of university staff or students
- student activities (examinations, field trips, placements, etc.)
- travel to University's sites and properties for university purposes
- business and governance meetings
- fundraising activities and initiatives
- institutional Partnerships
- overseas assignments
- study leave

For clarity, University-sponsored travel does not include:

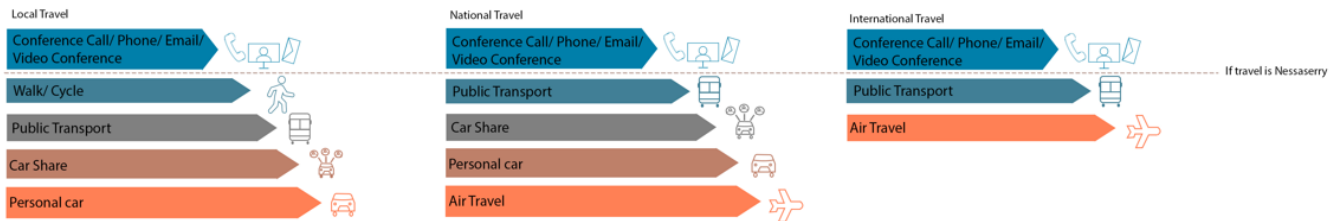
- staff travelling from home to the workplace (i.e., commuting).
- personal travel (travel for leisure or other non-University or work-related reasons).
- student travel to/from the University at the start/end of a term; or
- travel for individuals or employees of organisations who provide services under contract to the University. Where required, travel provisions of such contract personnel should be set out in the relevant contract.

Where travel is not in scope as defined as university-sponsored travel, University Travellers are encouraged to adhere to the principles of the Policy.

Travel Hierarchy Principles

The University recognises that virtual collaboration methods are not always an effective alternative to in-person interactions, and therefore some travel is essential for supporting academic, research, business and educational objectives. However, wherever possible, the number of individuals who travel should be limited.

The University acknowledges the significant carbon impact of travel activities. The Sustainable Business Travel hierarchy promotes walking, cycling, public transport and car sharing in preference to single occupancy car use for movement of people. Flying is the mode of travel with the highest and most detrimental environmental impact. Where a low carbon alternative to air travel can be found it is preferred over air travel. When travelling by air, Economy class travel is the default method as it has the lowest carbon footprint due to the allocation of less space on the plane as compared to other classes of travel.



Travel should be planned in advance and wherever possible multiple trips between campuses within the same week should be avoided through 'batching' and consolidating travel.

Car-pooling in University Fleet cars for trips between Wellington and Palmerston North are preferred to single occupant trips.

Where available, alternatives to travel must be considered prior to booking travel and clearly shown during the approval process. Examples of alternatives include use of virtual collaboration tools, as well as examining whether other colleagues from across the University are attending an event and are able to effectively carry out and achieve the purpose of the travel. The availability of virtual attendance/collaboration does not automatically preclude in-person attendance/attendance, but University Travellers should give full consideration to alternatives to travel whenever possible.

Travellers' responsibilities

Prior to making a travel commitment, Travellers must communicate with their line manager or relevant University authority about their intended travel plans. University Traveller's must:

- a. demonstrate that University business is the dominant purpose of travel and secure pre-trip approval or authorisation prior to embarking on travel and/or incurring travel expenses.
- b. estimate anticipated expenditure and confirm University funds will be spent in a reasonable and transparent manner.
- c. demonstrate that alternatives to travel have been considered and evaluated.
- d. confirm that the funding source is clearly identified and has funds available to cover the travel expense.
- e. ensure travel is booked or logged through the University's Travel Management Company's booking system.
- f. ensure appropriate travel insurance is organised and is in effect for all University-sponsored travel activities prior to travel commencing.
- g. confirm awareness of legal, personal safety and cultural sensitivities of their host country and/or organisation.
- h. conduct self-assessment to ensure Traveller is physically, mentally and medically fit to travel.
- i. arrange for any required vaccinations, including any COVID-19 vaccination, required for the travel destination.

- j. confirm appropriate risk mitigation will be undertaken including risk controls related to communication plans, emergency plans, fitness for travel, high risk activities, and maintaining awareness of relevant travel advisories.
 - confirm travel documents are current and valid for the travel. Travellers are responsible for obtaining their own passport and visas prior to travel commencing and are responsible for the costs of obtaining a passport.
 - communicate any plans to incorporate personal travel with university-sponsored travel to both line/approving manager and Travel Management Company (TMC); and
- a. if relevant, confirm there will be no negative impact on personal and team workload, and faculty/school activities such as teaching and research supervision; and
- b. complete any post-travel documentation required (i.e., post-travel report documenting the outcomes/benefits of the travel).

Travellers receiving funding for travel from an external body must ensure that their travel complies with the conditions of the relevant external body.

Travellers must ensure that they comply with the University's policies and that any expenditure they incur while travelling is for a legitimate University purpose. University Travellers are expected to consider and adapt their travel methodologies to reduce the environmental impacts of their travel.

Refer to the Travel Procedural Guidance for further information on Travellers' responsibilities.

Travel Approvers' Responsibilities

A University Traveller must not approve their own University-sponsored travel or expenses. Any application to undertake travel must be approved by the University Traveller's line manager and/or Head of School/Institute/Department. All international travel must be approved by the relevant Senior Leadership Team (SLT) member.

All approvals must be in line with delegated authority policies.

Travel Approvers are required to ensure that University resources are used appropriately to ensure safe, prudent and effective travel. Travel Approvers are responsible for considering and verifying the below four factors before approving any University Travel.



Travel Approvers are responsible for ensuring compliance with the University's travel policies and procedural guidance. Approvers must ensure that travel is in accordance with this policy and in a manner that ensures that the University is able to maintain its employer duty of care.

Travel Approver responsibilities include:

- confirming Travellers understands their responsibilities in accordance with this policy.
- confirming that the travel is being undertaken for legitimate and official University-purpose activities.
- if there is a personal component to the travel, that the primary purpose of travel is for university business.
- ensuring documentation of Travel Purpose sufficiently communicates the need for the expense and that alternatives to traveling have been appropriately considered and evaluated.
- directing the University Traveller to book flights and accommodation through the University's TMC and endorsed booking system.
- ensuring that any University-purpose travel expense charged to or paid by the University is in accordance with the Delegations of Authority Policy, and the requirements of any relevant funding body.
- confirming, subject to the nature of risk, travel risks and risk controls, communication plans and emergency plans have been appropriately identified, assessed and managed such that that any residual risk is acceptable to the Travel Approver.
- in the case of travel to high risk level destinations, ensure the University Traveller has:
 - taken into account relevant travel advisories (including those related to the Traveller's personal circumstances and personal characteristics); and
 - completed the Risk Assessment and Risk Management steps of the Travel Authorisation process; and
 - assessed and managed travel risks such that any residual risk is acceptable to the Traveller.
- ensuring that expense reimbursement requests are handled in a timely and accurate manner including submission of required receipts.
- ensuring expenses are in compliance with the University and/or funder's policies for allowable costs.

Travel to countries with high-risk ratings (as identified on the Ministry of Foreign Affairs and Trade (MFAT) Safe Travel website during the time period of proposed travel) requires approval from the Vice Chancellor (VC). In the case of destinations identified by MFAT as "avoid non-essential travel" the VC shall:

- ensure the University Traveller has taken into account, relevant travel advisories, including those related to the traveller's personal circumstances and personal characteristics.
- completed the appropriate risk assessment and authorisation forms; and
- assessed and managed travel risks such that that any residual risk is acceptable.

Travel to countries identified by MFAT as “do not travel” will not be approved under any circumstances due to the extreme risk associated with these areas.

Booking Travel

In order to maintain and manage the University’s duty of care for University Travellers, all University-sponsored travel must be booked and paid for via the University’s approved TMC in accordance with the Travel Procedural Guidance.

The exception to booking through the TMC is if the University-sponsored travel is wholly funded by an external source which mandates the use of their own travel agent. However, where possible, the University Traveller should seek the option to book through Massey’s TMC and invoice the external source for the cost.

Massey University is a participatory to All of Government (AoG) Agreements including for air travel services. The TMC will in the first instance, endeavour to quote and book travel through preferred agreements. Where the preferred suppliers are unable to service the Traveller’s requirement or the destination, the TMC will provide alternative solutions for review and approval.

Personal Travel/Dual-Purpose Travel

A manager may approve adding on a personal trip to a work trip provided the:

- University-sponsored Travel component is the dominant purpose of the travel.
- all private expenses are paid for from the traveller’s personal funds.
- there is no additional cost to the University; and
- a Massey Finance Business Partner, or the Chief Financial Officer, has confirmed that any Fringe Benefit Tax implications are appropriately managed.

Managers should ensure this provision is not overused such that a perception could be created that work trips are being undertaken to supplement holiday time.

Approval may be given to University Travellers being accompanied by a partner on a work trip provided:

- manager approval has been received prior to making any commitments; and
- any additional expenses incurred for the accompanied travel are privately funded.

Refer to **Guidelines for Dual-Purpose and Multi-Purpose Travel** for further information.

Sustainability considerations

Low carbon choices when travelling between destinations in Aotearoa New Zealand or overseas



Carpool
Preferably with an EV/hybrid vehicle



Regional coach/train services
Often with free wifi
e.g. [Capital Connection service](#)



Use shared vehicles
e.g. buses, taxis & shuttles
[Auckland Services here](#)



Inter-Continental coach/train services



Flying
Preferably most direct route and economy class

The University is committed to managing travel requirements in a fair, consistent, and efficient manner, reducing our carbon footprint and being mindful of the various impacts of travel.

The University acknowledges that any travel has an impact on the environment in terms of the use of fuel or energy, and through the generation of emissions.

University-sponsored travel is one of the University's principal sources of carbon emissions and has a significant impact on the delivery of the Climate Action Plan and our commitment to the University's NetZero Carbon by 2030 goal.

Travellers should refer to the Low Carbon Travel Guidelines on ways to reduce carbon footprint.

Well-being considerations

The University recognises that travelling has an impact on staff wellbeing and work-life balance. It is the University Traveller's responsibility when seeking University-sponsored travel approval to conduct a self-assessment to ensure they are physically and medically fit to travel.

In making this assessment, staff are strongly encouraged to seek medical advice and clearance from a doctor for pre-existing medical conditions prior to travelling overseas. Where a pre-existing condition requires medical attention while travelling, the insurer may require medical evidence that you were 'fit to travel' upon commencement of travel.

Any documentation pertaining to a Traveller's medical status is to be retained by the University Traveller for use if required.

Safety Considerations

The safety and security of University Travellers is a matter of the highest concern. The University has a duty of care to all University Travellers and will act reasonably in our aim of protecting the health, safety and welfare of University Travellers. University Travellers will comply with all travel-related duty of care and personal safety and security requirements as determined necessary by the University. The University needs to be assured that those travelling have fully considered the risks and put appropriate precautions into place.

MFAT provides advice on security and safety concerns in many destinations. This advice is based on information from a number of sources. It reflects potential risks, and our assessment of what these might mean for New Zealanders.

MFAT Travel website classification	University Policy
Countries and territories that are classified as Do Not Travel on the MFAT Safe Travel website	University Travellers must not visit under any circumstances due to the extreme risk associated with these areas
Countries or territories classified as Avoid non-essential travel are deemed high risk	Should only be visited under exceptional circumstances and must be approved by the Vice-Chancellor prior to booking
For other cautionary classifications	The travel approver needs to demonstrate a high degree of conviction in the need for the trip and that other alternatives (video conference, host relevant meetings in another country etc) are not readily applicable.

University Travellers are advised to review the risk assessment prior to commencing travel to ensure it remains accurate. While conducting travel activities, University Travellers should access up to date travel information and advice and real time alerts on breaking news globally that may impact the safety and security of travelling in specific locations.

The University encourages University Travellers to seek medical advice before travelling any long distance or overseas.

The University continues to strongly encourage all Travellers to comply with travel guidance issued by local public health departments and governments, whether travel is for University-sponsored travel or personal travel. Travellers must adhere to constraints on travel defined in associated policies (including Pandemic/Covid-19 policies).

Massey has engaged the services of a Travel Risk Management Service Provider (TRMSP). The services provide University Traveller's 24-hour expert advice and assistance before you travel, while abroad, and/or in an emergency.

As some of the services available are contingent on the University being able to report travel arrangements to the service provider, this is dependent on utilising the University's Travel Management Company for booking.

Travel Policy Approval and Changes

This policy is subject to approval by SLT and any amendments or changes to the policy can only be implemented with the approval of SLT and following a reasonable period of consultation with staff.

The VC acting through the appropriate SLT member may vary or suspend any of the Travel Policy or associated procedural guidance at any time to meet any unforeseen event. Such events include issues associated with the Health and Safety of the Traveller, financial considerations, and any statutory or regulatory changes or guidelines.

Emergency Exemption to the Policy

An exemption to this policy may be provided only in emergency situations where, due to unforeseen circumstances, or to preserve the safety of university staff. For example, a natural disaster or where global ports have been closed emergency rebooking outside of standard approvals may be necessitated.

For information on guidance for Travellers during emergencies, please refer to Travel Procedural Guidance.

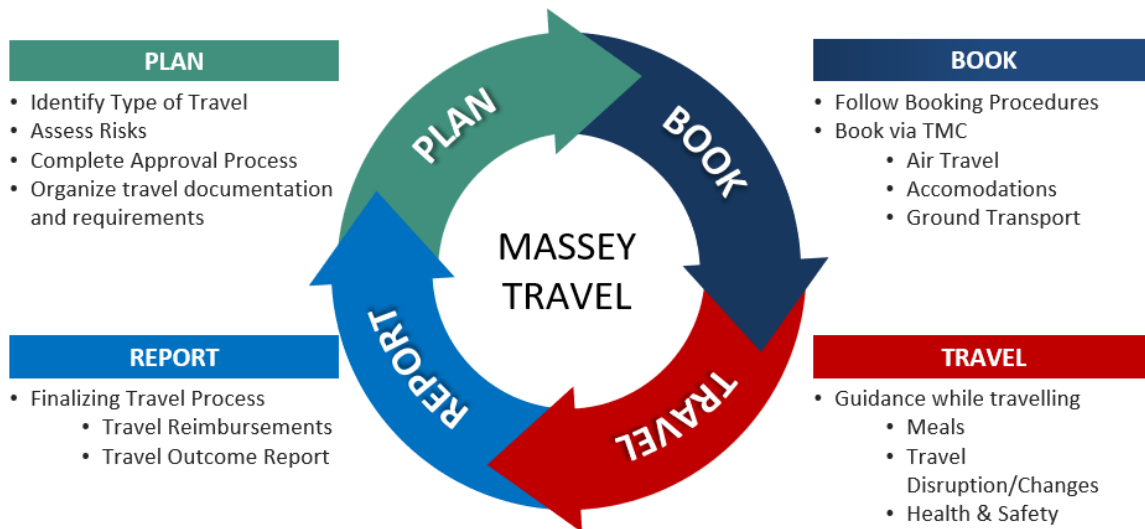
Non-Compliance

When undertaking University travel, University Travellers are representing the University and therefore must ensure that their behaviour is at all times appropriate to the purpose of the travel, compliant with local laws and consistent with the Massey University Policy on Staff Conduct and Massey University Code of Student Conduct.

Where it is identified that an individual has failed to comply with this Policy, they may be subject to disciplinary action, up to and including dismissal, withdrawal or suspension in line with the relevant Code of Conduct.

Additional Guidance

The **Travel Procedural Guidance** document has been designed to help determine the process for gaining approval and completing travel and is illustrated below. This guidance provides detailed information to support the travel process and ensure appropriate steps are taken to plan, book, conduct and report on travel activities.



The Travel Procedural Guidance should be referred to prior to seeking any travel approval.

Audience:

All Staff.

Relevant Legislation:

None.

Related Procedures and Documents:

This policy is not to be considered in isolation. It is to be read in conjunction with all related policies and other documents, including, but not limited to the below documents:

- Travel Procedural Guidance
- Guidelines for Dual-Purpose and Multi-Purpose Travel
- Low carbon Travel Guidelines
- MFAT Safe Travel Website
- TMC Travel Booking system and documentation.
- Staff Long Term Travel Assignments Offshore
- Procedures for Course Related Student Travel Overseas
- Chubb Business Travel Insurance
- Vehicle Management Policy
- Reimbursement of Expenses Policy
- Credit Card Policy
- Sensitive Expenditure and Gifts Policy and Procedures

Other related policies/documents:

- Delegations of Authority Policy
- Policy on Staff Conduct
- Code of Student Conduct
- Health, Safety and Wellbeing Policy
- Leave Policy and Regulations
- Guidelines for Leave while performing duties beyond home location.
- Massey University Strategy
- Staff Travel Insurance Policy Summary
- Student Travel Insurance Policy Summary
- Field Trip Health and Safety guidelines
- Guidelines on Research, Teaching, Study and Professional and Organisational Periods/Duties Overseas and in New Zealand and Professional and Organisational Periods/Duties Overseas and in New Zealand

Further Information

The University's travel policies, procedures, protocols, and processes are supported by the Strategic Procurement and Contracts office (SPCO) in University Services, in conjunction with the University's preferred Travel Management Company (TMC) and Travel Risk Management Service Provider (TRMSP).

Document Management Control

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