

## TRAVEL POLICY

<b>Section</b>	Finance
<b>Contact</b>	Chief Procurement & Contract Officer
<b>Last Review</b>	May 2014
<b>Next Review</b>	May 2016
<b>Approval</b>	SLT 14/05/111
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### Purpose:

To ensure that any person travelling on Massey University (the “University”) business does so in a legitimate, cost effective and physically safe manner.

### Scope:

This document applies to all University staff, contractors and students for all domestic and international travel and related expenses.

The policy provides a University standard that can only be exceeded in limited / exceptional circumstances, and only with the prior written approval of the appropriate staff of: Chief Procurement and Contracts Officer (CPCO) or the relevant Senior Leadership Team (SLT) member or the Vice-Chancellor.

All staff must adhere to the policy irrespective of the source of funding for the travel.

### Policy:

All travel, including associated accommodation, rental car hire and private car usage, undertaken on behalf of Massey University must be:

- Travel for legitimate University business purposes;
- Documented and approved **prior** to departure (on rare occasions post approval may be permitted, but clear justification must be provided in accordance with the travel procedures);
- Within approved budgets or funded from external sources or by private means;
- Booked through the designated University Travel Management Company (TMC);
- Arranged in such a way as to optimise the safety of the traveller; and
- Covered by travel insurance when travelling overseas.

Where travel costs are paid for by an external party and booked through their preferred travel agent, the requirement to use the University’s TMC will not apply. However, in such circumstances, the remainder of the policy and the travel procedures will still apply.

## Principles:

**Accountability:** The delegated budget centre manager (or a nominee acting on the behalf of a delegated budget centre manager) will be accountable for financial decisions that breach this Policy.

**Cost Effective Payment or Staff Reimbursement:** Staff members with University credit cards are to use them whenever possible or appropriate for incidental expenses incurred while travelling – instead of submitting staff reimbursements. Where a University credit card has been used for meals and/or accommodation, no additional claims for an allowance through a staff reimbursement should be made.

**Health and Safety:** Staff and their Managers are expected to consider staff and other related travellers safety at all times and make the appropriate decisions regarding travel.

**Monitoring and Review:** Reviews of compliance with the Travel Policy and Travel Procedures (Domestic and International) will be undertaken in accordance with the Internal Audit programme of work.

**Prudent Judgement:** Staff and the Managers to whom they report, are expected to exercise prudent judgement regarding the expenses and the cost effectiveness to the University. The standards of justifiable and reasonable expenditure while undertaking travel should be evident in any travel decision-making and travel expenditure and it must be able to withstand public scrutiny.

**Reimbursement of Travel-Related Expenses:** Staff may seek reimbursement of travel-related expenses in accordance with the Reimbursement of Expenses Policy, Travel Procedures (Domestic and International) and Leave Regulations. Employees should not gain or lose financially when required to travel on university business.

**Reporting:** Appropriate reporting may be required to be undertaken. Examples include - performance against any TMC Contract, approved exceptions to the policy, reporting against financial and non-financial KPIs as required for travel management.

**Travel Planning and Appropriateness:** The traveller should plan ahead in order to allow the University to take advantage of the best possible travel rates and/or discounts. Prior approval of travel is required.

Managers or their delegate should satisfy themselves that the travel is necessary to meet departmental and/or University objectives, that the staff member concerned is the appropriate one to undertake the travel, and that the expenditure incurred is reasonable.

**Use of Vehicles:** Staff must use university fleet vehicles if available. If a fleet vehicle is not available or not appropriate, staff should select the most cost-effective alternative.

## Domestic Travel

### Accommodation (hotel/motel)

- Accommodation exceeding the established maximum cap per night, as outlined in the travel procedures, requires the prior approval from the relevant SLT member and/or the University Procurement and Contracts Officer.

### Air points

- ▶ Airpoints accumulated by staff while travelling on University business must only be used for future University travel. Staff should use airpoints for any subsequent University trips to avoid the balance accumulating.

### **Air fares**

- For domestic travel within three hours driving distance of a University campus, air travel is not normally allowed. Any exemption to this requirement must be approved by the relevant SLT member.

### **Airline Lounge Membership**

- All membership payments are to be renewed annually at the University's corporate rate and must be authorised by the relevant SLT member.

### **Alcohol**

- The University will not normally reimburse alcohol or liquor – it is treated as a personal expense of the traveller. This includes staff travelling with other parties or peers.
- The only exception is where a staff member hosts visitors while away on business and such hosting is expected to be part of the business conducted. Full details of the event must be provided along with justification for the expense and all receipts. If the cost is likely to be more than NZ\$80, it should be included in the estimate provided at the time of travel authorisation.

### **Allowances (domestic only)**

- Allowances can only be claimed if it is difficult to obtain receipts or charge back costs to the University.

### **Annual Leave**

- Individuals may undertake take leave within reasonable limits in conjunction with business travel, provided there is no additional cost to the university, the private travel is incidental to the business travel, and their manager has granted approval. Private travel ceases to be incidental to the business travel if it is, or if it is perceived to be, the primary reason for the travel. In such cases, a contribution to the airfare is to be made. The contribution is to be in proportion to the time spent on leave compared to the time spent on University business. To ensure that this provision is applied equitably, the appropriate SLT member may approve exceptions, exceptions must be in writing.
- A university credit card must not be used to pay for any personal or leisure activities. Personal travel costs and expenses will not be met by the University.

### **Cancellations**

- All unused tickets, coupons or vouchers relating to corporate travel **must** be returned to the budget centre's travel coordinator as they may be refunded to the University.

### **Class of Travel**

- Economy class travel will be the standard class of travel. In exceptional circumstances upgraded travel may be permitted, subject to written prior approval from the Vice-Chancellor or their delegate.
- As a rule the lowest available fare must be booked for travel unless there is a high probability that the airfare will require change, in which case a flexible fare may be booked.

### **Conferences and Events (internal and external)**

- Staff attending internal or external conferences and events within New Zealand require the **prior** approval of their Manager. All other conferences and events require the approval of the relevant SLT member.

### **Expenses**

- The University reimburses expenses on an actual and reasonable basis. If an expense is not incurred then there can be no reimbursement. Similarly if expenses are excessive, the University may decline to reimburse such expense if it is unreasonable.
- Reconciliation of all travel expenses must be completed within 30 days of returning to New Zealand.
- Staff must keep tax receipts for all expenses incurred.
- Regardless of the source of funding, all staff are expected to use the funds made available for travel in the most cost-effective manner.
- The University will not reimburse personal expenses. This includes in-house movies, alcohol, all mini-bar charges and charges for special or extra hotel facilities, such as gyms and hairdressers.

### **Laundry**

- The cost of laundering clothes for staff while travelling domestically is not normally paid, except for exceptional circumstances,

### **Travel Insurance**

- Travel insurance is provided by the University and must be taken by all individuals travelling overseas on University business. The University will pay for cover in respect of University related travel only.

### **Receipts**

- Staff must obtain, where possible, tax receipted bills for all expenditure incurred.
- Credit card slips and other receipts that do not give details of purchases are not considered to be an adequate means of justifying expenses.
- Where it is impossible to obtain receipts, especially for small amounts of expenditure, the staff member should state this when claiming reimbursement, provide a brief description where possible and certify that the amount claimed is legitimate and provide written approval from their Manager.

### **Reimbursement for Personal Car Usage**

- Staff must use a University fleet vehicle if available.
- If a fleet vehicle is unavailable, then the staff member may use a personal vehicle provided that the budget centre manager's prior approval is obtained and the vehicle is insured, warranted and registered.
- Employees will be reimbursed for an insurance excess, or up to the value of the excess, where damage is sustained to their personal vehicle whilst the vehicle is being used on university business provided that the damage is reported immediately to the budget centre manager, a police report is filed and signoff is obtained from the appropriate SLT member.

### **International Travel**

Responsibilities of Heads of Department, Institutes and Schools or their delegate are:

1. To ensure that appropriate approvals and procedures are in place for the authorisation of all staff related activities involving overseas travel.
2. To ensure that appropriate risk identification assessment and control measures have been undertaken such as travel and medical insurance, visas etc.
3. Ensure that current and accurate information regarding the location and contact details of staff travelling overseas are retained by the department. This information must be accessible for use by the University at short notice.

All international travel must be documented and approved **prior** to departure by either:

- Leave and Ancillary Appointments Committee (LAAC) - for travel within the delegated scope of that Committee; or

- The relevant SLT member (for other travel)

*(For further details on international travel approval, please refer to the University's Leave Regulations)*

### **High Risk Countries:**

Travel may be considered to countries identified on the MFAT Safe Travel website as being **high risk** at the time of approval application, provided that:

- Any security advice is appended to the application, and risks are identified and mitigated; (further security advice may also be obtained by contacting the TMC).
- Travel to countries, or regions of countries, identified as being high risk, is considered essential for University business, and is unable to be deferred.
- Approval for travel to high risk countries must be recommended by the Appointments and Overseas Duties Committee (AODC), or the relevant Level 4 Manager and SLT member, and authorised by the Vice-Chancellor (or delegate).

Travel will **not** be approved to countries identified on the MFAT Safe Travel website as being **extreme risk**.

The Vice-Chancellor reserves the right to decline travel on University business to any country for any reason.

In the event of an emergency, travel-related issue or problem while you are travelling on University business, travellers should contact the University's TMC and their contact details are detailed on all travel itineraries issued to staff.

### **Right of Appeal:**

If a staff member is declined approval to travel to a country/region identified as being high or extreme risk, and consider they have a legitimate reason to travel to such a country, they may make an appeal for re-consideration directly to the AVC People and Organisational Development. Applications must ensure:

- The security advice is appended to the application, and risks are identified and mitigated; (security advice may be obtained by contacting our TMC).
- Comprehensive details of the proposed visit including rationale for travel, and details of security provisions.
- Approval (if given) for travel to countries identified as extreme risk must be authorised by the Vice-Chancellor.
- Such approvals are advised to the University's insurers and the Audit and Risk Committee of Council.

### **Audience:**

All University staff, contractors and students and anyone else whose travel is paid for by the University.

### **Relevant Legislation:**

None

**Related Procedures/Documents:**

[Discretionary Expenditure and Gifts Policy](#)  
[Reimbursement of Expenses Policy](#)  
[Leave Policy and Regulations](#)  
[Travel Procedures \(Domestic and International\)](#)  
[Procedures for Course Related Student Travel Overseas](#)  
[Health and Safety Policy](#)

**Document Management Control:**

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Owned by: AVC Strategy, Finance, IT and Commercial Operations  
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