

# Travel Management Policy

## Section 1 - Background and Purpose

(1) To guide a consistent and simple approach to University Travel Management thereby facilitating effective conduct of University business.

## Section 2 - Scope

(2) This Policy covers all University representatives travelling on University Business.

## Section 3 - Policy Statement

(3) Travel: All travel conducted for University business purposes must be made in accordance with this Policy.

### Code of Conduct

(4) The University expects all staff travelling for, and representing La Trobe University away from campus, to comply with the [Code of Conduct](#).

(5) Travel Considerations:

- a. Health and Safety risks (utilise DFAT indicators)
- b. Purpose of travel (beneficial to the University)
- c. Cost optimisation

## Section 4 - Procedure

(6) The University supports staff to undertake travel for University Business. The University only supports travel where this is beneficial to the University and the safety and security of staff undertaking travel is, as far as possible, assured.

(7) All staff undertaking travel for University business are required to be aware and abide by all conditions in the Travel Management Policy, this Procedure and Travel Management Guidelines available from the University intranet site. Staff should consider alternative options to travel including videoconferencing before planning any travel.

(8) Individuals providing services under contract to the University should refer to their contract travel provisions before enacting this Procedure and associated Policy and Guidelines.

### Part A - Code of Conduct

(9) The University requires travellers to observe the University's [Code of Conduct](#) when travelling.

## Part B - Travel Alternatives

(10) Travel alternatives should be considered. Teleconferencing and videoconferencing may be suitable alternatives.

## Part C - Booking Travel

(11) All domestic and international flights must be booked through the University's contracted travel service provider and initiated through the University's travel booking tool.

(12) Staff should where possible book accommodation through the University's contracted travel service provider and be initiated through the University's travel booking tool.

(13) University-related business does not include Outside Studies Programs.

(14) Travellers are required to understand their fare conditions for the purposes of ensuring best value is achieved. Refer to Travel Guidelines for more information.

## Part D - Safety and Security

(15) For international travel, travellers are responsible for determining the DFAT ratings for ALL destinations on the proposed itinerary prior to securing the booking. Regions within a single country may have different travel advisory ratings.

(16) For travel to destinations with a rating of DFAT Level 3 (Reconsider your need to travel) and risky activities, approval will flow to your usual authoriser who will also be approving the risk element. If, after discussions with the traveller's Manager, it is still considered necessary to travel on behalf of the University to a high risk destination, a travel request must be submitted on-line in the University's travel booking tool. When you enter the destination in the on-line tool, you must complete a Risk Assessment Checklist and attach it to the supporting documents section. The trip will flow to the relevant approver and then is forwarded to the travel service provider for action.

(17) Travel to destinations at Level 4 (Do not travel). If, after discussions with the traveller's Manager, it is still considered necessary to travel on behalf of the University to a high risk destination, a travel request must be submitted on-line in the University's travel booking tool. When you enter the destination in the on-line tool, you will be required to complete a Risk Assessment Checklist and attach it to the supporting documents section. The system will identify the DFAT level 4 risk rating and will automatically send a risk approval to the relevant Senior Executive Group member. Travel will not be approved and tickets will not be issued, unless the relevant member of the Senior Executive Group as approved the travel. Once the trip has been approved, the trip will flow to the travel service provider for action.

(18) Where an itinerary has been approved, the trip has not yet commenced and the travel advisory rating changes to a higher level (Level 3 or Level 4) for any destination on the itinerary, the traveller must complete a risk assessment checklist and forward it to their relevant approver for written approval and seek their approval to commence the trip.

(19) Where travel has already commenced and the DFAT risk rating changes to a higher level (Level 3 or Level 4), the traveller must immediately contact their relevant approver and seek approval to continue their trip.

DFAT Rating	Advice
Level 1	Exercise normal safety precautions: Indicates an overall security environment similar to that in a large Australian city. Overall, threats are not significant

DFAT Rating	Advice
Level 2	Exercise a high degree of caution: More numerous or significant risks in this location than what you would typically find in a large Australian city.
Level 3	Reconsider your need to travel: Serious and potentially life threatening threats that make the destination unsafe and unsuitable for most travellers.
Level 4	Do not travel. Further information on managing travel safety and DFAT ratings can be found on the <a href="#">Smartraveller website</a> .

## Part E - Number of Staff on Same Flight

(20) It is preferable that no more than three (3) La Trobe Senior Executive Members may travel together on the same flight either domestically or internationally.

## Part F - Class of Air Travel

(21) All domestic travel will be economy class.

(22) Premium Economy (or Business Class where the former is unavailable) may be selected on international air travel under any of the following circumstances:

- a. flight time exceeds eight (8) hours in duration; or
- b. the staff member's employment contract specifies the class of travel; or
- c. it is warranted on medical grounds and approval is given.

(23) If Premium Economy or Business Class flights are chosen, the expense must be:

- a. within the Divisional budget; and
- b. approved by the Head of School or Executive Director level equivalent within the staff member's division.

(24) Heads of Divisions must assess staff requests for premium economy or business class travel equitably.

(25) The University's travel service provider will request proof of this approval and needs to be attached to the supporting documents in the on-line travel booking tool.

(26) For travel undertaken under an external grant, the travel class and cost must adhere to the specific requirements of the funding body at all times.

## Part G - Authorisation of Travel

(27) Domestic travel does not require approval within the travel booking tool. Staff, however, need to ensure that their direct manager is aware and is supportive of the need for the staff member to travel domestically.

(28) Travel approvers for international travel must:

- a. Review and understand the trip information provided by the traveller and either approve or decline the trip having due consideration of the risk. This includes:
  - i. Understanding the DFAT Risk Rating and associated risks of the Country and City being visited;
  - ii. Understanding and challenging (if need be) the business case/justification for the trip - including the Travel Risk Assessment Form.

- b. have the appropriate level of Delegated Financial Authority,
- c. ensure the travel cost is within budget.

## **Part H - Costs Associated with International Travel**

(29) The University will pay Visa expenses in all instances for University Business.

## **Part I - Travel Expenses**

(30) It is recommended that staff that are required to travel on University Business should have a University Corporate Credit Card and this must be the predominant method of payment while travelling on University business.

(31) Cash expenditure should be viewed as exceptional and only incurred where no alternative is available.

(32) ATO published rates apply for all business travel. Expenditure beyond these limits will be for the account of the traveller. Refer to the Travel Expenses Guidelines

(33) The University requires full substantiation and acquittal of domestic and international business travel expenses through the provision of appropriate receipts and invoices upon completion of the travel.

(34) If a receipt has been misplaced or no receipt was given at the time of spend, a Business Expense Verification Form will be required to accompany the acquittal. The Business Expense Verification Form can be found on the Procurement Services website.

(35) Expenses incurred without substantiation may result in the cost of the claim being incurred by the staff member.

## **Part J - Personal Travel and Accompanied Travel**

(36) Where University business and personal travel are combined, all personal travel expenses are entirely for the account of the traveller.

(37) You will be requested to contribute to the applicable portion of travel costs if you spend more than 50% of the travel time on leave or private activities. Evidence, such as travel diaries, will be considered if there is a dispute.

(38) The University is liable for Fringe Benefits Tax (FBT) on the private portion if the employee contribution is not received.

(39) Queries about FBT implications should be directed to the Taxation officer in Finance Division and can be found in the FBT Policy.

(40) The traveller will fund all costs for non-employee travel companions.

## **Part K - Accommodation**

(41) Accommodation should be booked via the University's contracted travel service provider and initiated through the University's travel booking tool. The standard of accommodation chosen must provide a safe and secure environment, which is conveniently located and at a reasonable cost.

(42) Airbnb should not be used as they represent an unacceptable personal safety risk.

(43) Payment of all accommodation must remain in line with the University's Procurement Policy. Staff will be required to bear the costs of any unsubstantiated claims for accommodation.

## Part L - Frequent Flyer Schemes and Business Lounge Membership

(44) The University will not pay for Frequent Flyer scheme membership.

(45) A Head of Division may approve the purchase of a business lounge membership.

## Part M - Passports and Visas

(46) The University will pay Visa expenses in all instances for business related travel.

(47) Staff travelling overseas on University Business must ensure they hold a current and authorised passport.

(48) Passport costs will be borne by the staff member except when holding a valid passport is a requirement of the position.

## Section 5 - Definitions

(49) For the purpose of this Policy and Procedure:

- a. Accommodation: lodging other than that of permanent residence required due to travelling on University business for one or more nights.
- b. Business travel: Travel which includes leave from normal place of work and relates specifically to University business. Categories include: teaching; research; conferences; meetings; graduations; marketing; field trips; and Outside Studies Programs
- c. Corporate Credit Card is a corporate purchasing card issued by La Trobe's commercial banker to a La Trobe staff member at the direction of La Trobe University.
- d. Head of Division includes Head of School, Executive Director or equivalent level.
- e. Reasonable cost: for the purpose of University Accommodation, is a single room, with private facilities in a 3 - 4 star hotel.
- f. Risky activity includes an activity of a risky nature potentially resulting in serious injury or death.
- g. University Business is defined under the premise that the University will derive value from the travel to be undertaken and may include the following:
  - i. Attendance at conferences;
  - ii. External courses or development programs;
  - iii. University representation in an official capacity;
  - iv. University business in a commercial, business development or procurement capacity;
  - v. Obligations arising from membership of government bodies or international associations.

## Section 6 - Stakeholders

Responsibility for implementation – Chief Financial Officer; Strategic Sourcing and Procurement; Legal Services; Pro Vice-Chancellor (International); Heads of Schools and Departments, Senior Deputy and Pro Vice-Chancellors; Executive and Deputy Directors.

Responsibility for monitoring implementation and compliance – Director, Strategic Sourcing and Procurement; and Category Manager – Travel and Media.



## Status and Details

<b>Status</b>	Historic
<b>Effective Date</b>	22nd November 2016
<b>Review Date</b>	1st December 2019
<b>Approval Authority</b>	Vice-Chancellor
<b>Approval Date</b>	20th November 2016
<b>Expiry Date</b>	22nd April 2018
<b>Unit Head</b>	Mark Smith Chief Financial Officer
<b>Author</b>	Dean Licciardo Category Manager, Travel & Marketing +61 3 9479 1846
<b>Enquiries Contact</b>	Finance