

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 this Policy and Procedure and the [Travel Guidelines for Staff](#) available from the [Travel 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 Staff](#) 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 available via the [Insurance Office Travel webpage](#) 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 Smartraveller website .

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 Fringe Benefits Tax (FBT) Policy.

(40) In most circumstances, the traveller will fund all costs for non-employee travel companions, unless written approval is provided by the College Pro Vice-Chancellor, Deputy Vice-Chancellor (Research and Industry Engagement), Deputy Vice-Chancellor (Academic) or equivalent level.

Part K - Hotel (Approved Accommodation)

(41) Hotel Accommodation is the preferred lodging option for the University.

- a. It must be booked via the University's contracted Travel Service Provider (TSP) and initiated through the University's travel booking tool.
- b. The standard of accommodation chosen must provide a safe and secure environment, which is conveniently located and at a reasonable cost

Part L - Airbnb WORK (Approved Accommodation)

(42) "Airbnb WORK" can be used, where suitable hotel accommodation does not meet the lodging requirements of the trip.

(43) Standard and Safety

- a. Airbnb WORK seeks to ensure certain standards are met (generally accepted hotel standards).
- b. The University allows Airbnb WORK only as it reduces a variety of risks such as safety related incidents, service standard issues and booking reliability.

(44) 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.

(45) Responsibility of Traveller

- a. The traveller must do all research and due diligence to ensure the Airbnb Work property they are booking meets their business lodging needs.
- b. It is the responsibility of the traveller to research and find appropriate Airbnb work accommodation.
- c. The traveller accepts all responsibility for personal risk and safety, and it is expected that travellers have carried out appropriate due diligence before departure and on arrival, to ensure the standard of accommodation meets their needs, has high experience ratings (customer feedback), is safe, is in a safe neighbourhood and is conducive to conducting university business.
- d. The University Contracted TSP will not be liable for a traveller's safety, or the standard of accommodation that is booked. The University TSP will not provide any recommendations or provide suggestions when it comes to Airbnb WORK bookings. The University TSP will simply act as a booking agent ONLY to ensure that University travellers can be located and contacted in the event of an emergency.

Part M - Non-Approved University Accommodation

(46) Non-approved forms of business travel include, but are not limited to:

- a. Bookings direct with hotel (not via TSP);
- b. Bookings via aggregator websites or online marketplaces, including standard Airbnb, Stayz, Bookings.com, Trivago, Expedia, Trip Advisor etc.

(47) Exceptions

- a. Overseas Study Program (OSP)
 - i. Where the traveller is on OSP, and provided a grant/sum of funds towards their travel.
NOTE: All related OSP procedures and approvals must be adhered too. Refer to [Outside Studies Program \(OSP\) Intranet](#) page.
- b. Externally or Privately Funded Accommodation – Non-approved University accommodation can be used in the following situations, however the University strongly encourages travellers to utilise our TSP, noting the best price guarantee offered under our current contract.
 - i. Where the traveller is personally funding the accommodation
 - ii. Where a third party is paying for/funding the accommodation and has specified the booking process.
- c. In the above situations it is mandatory that the traveller:
 - i. Has an email or document from their direct supervisor approving their exemption from using the TSP for

the said accommodation.

- ii. Has confirmation from the insurance office that they are covered under the University insurance policy, or has alternate travel insurance in place.

Part N - Ground Transportation

Ground Transportation Considerations

(48) The following factors should always be considered when determining the most appropriate mode of transport for University Business Travel:

- a. lower total cost to the University
- b. period of time for which the vehicle is required
- c. length of the trip
- d. location – eg interstate or local

Ground Transport Alternatives

(49) The following modes of transport may be used for University Business Travel in the following order of priority:

- a. University Fleet Vehicle, being:
 - i. An Allocated Vehicle or Departmental Vehicle where available to the particular driver.
 - ii. A Pool Vehicle
- b. Car share vehicle
- c. Rental Vehicle
 - i. Where it is impractical to use a University Fleet Vehicle, a hire vehicle may be arranged through University's preferred rental company.
- d. Taxi / Uber (in Australia)
 - i. Where a taxi is utilised for University Business Travel, a university corporate card, a Cabcharge e-TICKET or FASTCARD should be used. In exceptional circumstances employees may pay the taxi fares personally and be reimbursed by the University upon presentation of a tax invoice.
 - ii. Where Uber (in Australia) is utilised, a University Corporate Card must be linked the Uber Account under the "Business Option", and subsequently charged. Once set-up the Uber tax invoice will automatically appear in the card holders Expensify Account ready for coding.
- e. Private Vehicle
 - i. an employee may use their own vehicle, if no other vehicles (pool vehicles; car share vehicles or rentals) are available
 - ii. Approval must be obtained from the employee's supervisor/manager (with the appropriate delegated financial authority) prior to use of a private vehicle.

(50) The University does not provide insurance coverage for private vehicles, and the cost of any accident repairs, damage, and liability (including insurance excesses) in private vehicles are the sole responsibility of the driver.

(51) Where applicable, convenient and cost effective public transport can also be used as a ground transport alternative.

Part O - Frequent Flyer Schemes and Business Lounge Membership

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

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

Part P - Passports and Visas

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

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

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

Part Q - Emergency Procedures

(57) Whenever travelling on university business, the traveller should always refer to the [Insurance Office Travel webpage](#) for any questions, contacts and procedures relating to their safety whilst on trips.

Section 5 - Definitions

(58) 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.

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