

# Travel Management Policy

## Section 1 - Background and Purpose

(1) To provide the policy settings for a consistent and simple approach to University travel management thereby facilitating effective conduct of University business and the judicious use of public funds.

## Section 2 - Scope

(2) This Policy covers all University representatives travelling on University Business. University funded travel, including that funded by operating budgets, outside earnings and grants, must follow this Policy.

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

## Section 3 - Policy Statement

(4) Travel is important to La Trobe University, connecting staff with colleagues, academic communities, industry and the wider world. However, the costs and risks associated with travel mean that it is important to ensure each trip is necessary and valuable to the University. Critical travel considerations include:

- a. Health and Safety risks (utilise DFAT indicators)
- b. Purpose of travel (beneficial to the University)
- c. Cost optimisation (funding the right work, the right way to ensure a return on investment). All spend should be made judiciously with due consideration of any alternative options
- d. Environmental stewardship (avoiding excessive air travel helps progress the University's Carbon Neutral strategy)

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

## Section 4 - Procedures

(6) The University supports staff to undertake travel for University Business. The University only supports travel where it is deemed necessary, where it is beneficial to the University and where the safety and security of the traveller 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](#). Before planning any travel, staff should consider alternative options to travel including videoconferencing.

(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 - Need to Travel/Alternatives

(9) For every travel request, Managers and Financial Delegated Approvers are required to question the need for staff to travel, and evaluate whether it is sufficiently:

- a. Valuable, providing large enough benefit to the University to justify the costs;
- b. Relevant to the University's core activities and priorities.

(10) Travel alternatives should always be considered, i.e teleconferencing and videoconferencing may be suitable alternatives. It is the responsibility of travellers and approvers to ensure that all alternatives have been explored.

(11) Travellers are obligated to justify the need for travel to their designated approver, who has the final decision over whether, or under which conditions, the trip will proceed.

## Part B - Booking Travel

(12) To assist with the University's duty of care to all staff and students, 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.

(13) Staff must book all accommodation through the University's contracted travel service provider, initiated through the University's travel booking tool. Exceptions are outlined in Part I of this Policy.

(14) Airfares and accommodation must be booked through the University's travel booking tool as early as practicable to optimise cost savings. Optimal booking for all airfares is at least 3 weeks prior to departure.

(15) University-related business does not include Outside Studies Programs (these do not need to be booked via the University's travel service provider).

(16) 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 C - Safety and Security

(17) Under no circumstance will the University approve or support travel to [Department of Foreign Affairs and Trade](#)(DFAT) Level 4 rated destinations. [DFAT](#) has determined category 4 destination as high risk to personal safety and security. Travel to [DFAT](#) Level 4 rated destinations is outside the University risk appetite and a failure of the University's duty of care to staff and students.

(18) 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.

(19) To minimise risks whilst overseas, all travellers should research the destination country's laws and attitudes to travellers. Staff must obey the laws of the countries they are visiting. Staff should consider travel advice on the Australian Government's [Smart Traveller Website](#) and if this identifies any issues or risks that may affect their ability to travel, then they should re-consider the need to travel to that country.

(20) For travel to DFAT Levels 3 or 4 rated countries the following is required, prior to travel:

- a. you must contact the Insurance Office to ensure you are covered by insurance ([insurance@latrobe.edu.au](mailto:insurance@latrobe.edu.au))
- b. the traveller's Financial Delegate Approver can contact Risk Management Office (E:

risk.services@latrobe.edu.au) for risk advice to assist with their decision making process;

- c. if, after discussions with the traveller's Financial Delegate Approver, 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. The Risk Assessment questions in tool must be completed. The system will identify the [DFAT](#) level 3 or 4 risk rating and will automatically send a Notification to Risk Management Office. Risk Management Office will provide risk advice to assist the Financial Delegate Approver in making a final decision. Travel will not be approved and tickets will not be issued, until the previous steps have been undertaken. Once the travel has been approved, the information will flow to the University's travel service provider for action.

(21) Where an itinerary has been approved the trip has not yet commenced, and the travel advisory rating changes to a higher level (DFAT Level 3 or Level 4) for any destination on the itinerary, the traveller must contact their Financial Delegate Authoriser who will consult with the Risk Management Office in making a final decision on whether the trip should proceed to a DFAT level 3 destination. Where a destination country has changed to DFAT level 4, the trip cannot proceed.

(22) 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 authoriser and Risk Management Office and seek recommendation to continue their travel.

(23) The University recommends that all staff:

- a. review the ["Before You Go" page](#) on the [Smartraveller](#) website for advice prior to departing on their trip;
- b. subscribe to receive [Smartraveller](#) updates whilst overseas; and/or
- c. follow [Smartraveller](#) on social media.

DFAT Rating	Advice
<b>Level 1</b>	Exercise normal safety precautions: Indicates an overall security environment similar to that in a large Australian city. Overall, threats are not significant.
<b>Level 2</b>	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.
<b>Level 3</b>	Reconsider your need to travel: Serious and potentially life threatening threats that make the destination unsafe and unsuitable for most travellers.
<b>Level 4</b>	Do not travel. Further information on <a href="#">staying safe and avoiding danger</a> and <a href="#">destination DFAT ratings</a> can be found on the <a href="#">Smartraveller</a> website.

## Part D - Number of Staff on Same Flight

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

## Part E - Class of Air Travel

(25) All domestic travel will be economy class.

(26) Flexible class airfares (domestic or international) are not permitted unless no lower cost alternatives exist.

(27) The Senior Executive Group (SEG) members and Chancellor may book Business class for flights of 8 hours or more.

(28) Staff required to travel internationally (excluding trans-Tasman) more than six times per calendar year, may book an international Premium Economy (or Business class where the former is unavailable) for flights longer than 8 hours but must have written pre-approval from a Senior Executive Group Member prior to making the booking.

(29) Other than the above, Premium Economy (or Business Class where the former is unavailable) may be selected on international air travel if:

- a. a leg of the trip is of an exceptionally demanding nature and written approval from a Senior Executive Group Member is given;
- b. the staff member's employment contract specifies the class of travel;
- c. it is warranted on medical grounds and written approval from a Senior Executive Group Member is given; or
- d. the flight is externally funded.

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

- a. within the Divisional budget; and
- b. approved by a member of the Senior Executive Group.

(31) Where Premium Economy or Business Class Flights are chosen and approval has not been provided by a member of the Senior Executive Group, the staff member will be required to refund to the University the cost difference between an economy flight and the Premium Economy/Business class fare purchased.

(32) Travel Authorisers must assess staff requests for premium economy or business class travel equitably, in consultation with the appropriate Dean or equivalent.

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

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

(35) Staff may elect to personally pay or use Frequent Flyer points to upgrade an economy class ticket to a higher class of air travel. Where an upgrade requires the individual to purchase a flexible fare base ticket, it is the traveller's responsibility to privately fund the difference from the base, non-flexible economy fare.

## **Part F - Authorisation of Travel**

(36) Domestic and international travel will be approved by the appropriate Financial Delegated Approver through the travel booking tool. Prior to booking any travel, the traveller must discuss the need to travel and seek approval from their line manager and/or Financial Delegated Approver. The University only supports travel where it is deemed necessary, beneficial to the University and where safety and security of the traveller is assured.

(37) Travel approvers for domestic and 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, travel and health restrictions and associated risks of the Country and City being visited;
  - ii. Understanding and challenging (if need be) the business case/COVID Supplementary Document/justification for the trip.
- b. Have the appropriate level of Delegated Financial Authority;

- c. Ensure the travel cost is within budget;
- d. Check and approve any FBT liability the traveller may incur when combining business and personal travel;
- e. Ensure annual leave requests have been submitted and approved if annual leave is combined with the business trip; and
- f. Ensure staff member travelling has made arrangements to cover their teaching and workload obligations whilst absent on University business and provided a contingency plan should the staff member be delayed from returning to work commitments.

(38) Financial approval for International travel is deemed to the lesser of:

- a. the approved estimated trip amount plus 10%, or
- b. the approved estimated trip amount plus \$500.

If this amount is exceeded, the Financial approver will be required to approve the variance by email to the travel consultant.

## **Part G - Travel Expenses**

(39) Cash expenditure on travel should be viewed as exceptional and only incurred where no card payment alternative is available.

(40) The Australian Tax Office (ATO) published rates are to be used as a guide for all business travel. Expenditure beyond these limits will be reviewed and assessed. Excessive expenditure may result in the traveller being required to reimburse the University. Refer to the Travel Guidelines available via the [Travel Intranet Site](#).

(41) 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.

(42) 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.

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

(44) Any travel booked outside the travel booking tool (using aggregate online providers such as direct airline websites or accommodation websites) may require the traveller to reimburse the University. This will be decided at the University's discretion.

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

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

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

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

(48) Queries about FBT implications should be directed to the Corporate Finance and Reporting, Office of the Chief Financial Officer and can be found in the [Financial Management Procedure - Taxation](#).

(49) In most circumstances, the traveller will fund all costs for non-employee travel companions, unless written approval is provided by the Provost, Senior Deputy Vice-Chancellor (Research and Industry Engagement), Deputy Vice-

Chancellor (Academic), or equivalent level.

(50) The University travel insurance includes coverage for Incidental Private Travel which means private travel which is taken either side of, or during approved University travel. However, the duration of incidental private travel must not exceed the duration of business travel.

(51) If you require further insurance cover, you must contact the Insurance Office.

## **Part I - Approved Accommodation**

### **TSP-Booked Accommodation**

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

(53) Accommodation must be booked via the University's contracted travel service provider and initiated through the University's travel booking tool. Exceptions are outlined below.

(54) The standard of accommodation chosen must provide a safe and secure environment, which is conveniently located and at a reasonable cost.

(55) Staff are permitted to book multiple-occupancy accommodation (e.g. two-bedroom serviced apartment) instead of independent rooms where this allows for a lower overall cost to the University.

### **Airbnb**

(56) Airbnb can be used, where suitable hotel accommodation does not meet the lodging requirements of the trip and/or can meet the traveller's needs at a lower cost.

(57) Standard and Safety

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

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

(59) Responsibility of the traveller

- a. It is the responsibility of the traveller to research and find appropriate Airbnb accommodation.
- b. 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.
- c. The University contracted travel service provider will not be liable for a traveller's safety, or the standard of accommodation that is booked.
- d. The University contracted travel service provider will not provide any recommendations or provide suggestions when it comes to Airbnb 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.

(60) Non-approved forms of accommodation that are not permitted under this Policy include, but are not limited to:

- a. Bookings direct with hotels (not via the University's travel service provider);

- b. Bookings via aggregator websites or online marketplaces, including standard Airbnb, Stayz, Bookings.com, Trivago, Expedia, Trip Advisor etc.

## Exceptions

(61) Outside Study Program (OSP) – Where the traveller is on OSP, and has been provided a grant/sum of funds towards their travel. NOTE: All related OSP procedures and approvals must be adhered to. Refer to [Outside Studies Program \(OSP\) Intranet](#) page.

(62) 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:

- a. Where the traveller is personally funding the accommodation;
- b. Where a third party is paying for/funding the accommodation and has specified the booking process;
- c. Third party organised accommodation as part of a conference, event, tour or similar;
- d. Staff conducting “off-grid” fieldwork staying at purpose-built research stations or similar;
- e. The TSP confirms that it has no relevant content nearby.

(63) In the situations outlined in (58) and (59), it is mandatory that the traveller:

- a. Has an email or document from their direct supervisor approving their exemption from using the TSP for the said accommodation.
- b. Has confirmation from the insurance office that they are covered under the University insurance policy, or has alternate travel insurance in place.

## Part J - Ground Transportation

### Ground Transportation Considerations

(64) 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. safety
- e. location – e.g. interstate or local

### Ground Transport Alternatives

(65) The following modes of transport may be used for University Business Travel. Staff should exercise their judgement to avoid significant overhead travel, incidental cost or personal inconvenience.

(66) University Fleet Vehicle, being:

- a. An Allocated Vehicle or Departmental Vehicle where available to the particular driver;
- b. A Pool Vehicle.

(67) Car share vehicle.

(68) Rental Vehicle

- a. Where it is impractical to use a University Fleet Vehicle, a hire vehicle may be arranged through the University's preferred rental company.

#### (69) Uber/Taxi

- a. Uber is the preferred means of taxi/rideshare ground transport.
- b. Where Uber (in Australia) is utilised, the ride charge will go straight to the staff member's nominated cost centre or WBS which is linked to the Uber Account when set up (no credit card or expense coding required).
- c. Where a taxi is utilised for University business travel, Cabcharge 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.

(70) Private Vehicles - Note that 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.

- a. an employee may use their own vehicle, if no other vehicles (pool vehicles, car share vehicles or rentals) are available;
- b. approval must be obtained from the employee's supervisor/manager (with the appropriate delegated financial authority) prior to use of a private vehicle for inter-city trips.

(71) Where applicable, public transport should be used as a cost-effective and environmentally conscious ground transport alternative.

## **Part K - Frequent Flyer Schemes and Business Lounge Membership**

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

(73) A Head of Division may approve the purchase of a business lounge membership if more than six air business trips per year are required as part of the staff member's role.

## **Part L - Passports and Visas**

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

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

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

## **Part M - Emergency Procedures**

(77) 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.

## **Part N - Mobile Roaming**

(78) Travellers are responsible for arranging access to global roaming (voice and/or data) with IS for La Trobe issued Mobile services before they depart internationally.



## Section 5 - Definitions

(79) 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 Dean, 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. Externally funded: means paid for directly by a third party, and does not include grants or other means of indirect funding.
- g. Risky activity includes an activity of a risky nature potentially resulting in serious injury or death.
- h. 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.

## Status and Details

<b>Status</b>	Current
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