Travel Management Policy

Section 1 - Key Information

Policy Type and Approval Body	Administrative – Vice-Chancellor
Accountable Executive – Policy	Chief Financial Officer
Responsible Manager – Policy	Executive Director, Procurement Business Services
Review Date	19 December 2024

Section 2 - 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 funds.

(2) The University is mindful of the significant impacts of climate change on the wellbeing of our students, staff, and broader communities, both near and far. We align with the consensus of the Intergovernmental Panel on Climate Change [2023] that comprehensive and immediate actions are essential for addressing climate-related challenges. We are committed to contributing positively to a sustainable and resilient future for all.

(3) The University is committed to demonstrating leadership on climate change in our research, teaching and operations. Reducing our carbon footprint wherever possible is imperative to meeting our carbon neutral target by 2029 as set out in our Strategic Plan 2023-2030.

Section 3 - Scope

(4) This Policy applies to:

a. all University representatives travelling on University Business. University funded travel, including that funded by operating budgets, outside earnings and grants, must follow this Policy.
b. University-related business does not include Outside Studies Programs.

Section 4 - Key Decisions

Key Decisions	Role
Domestic and International travel approvals (via the booking tool)	Financial Delegated Approvers Level 3-7 (dependent on HR reporting lines)
DFAT Level 3 country destination travel	Financial Delegated Approvers Level 3-7 (dependent on HR reporting lines)
DFAT Level 3 country destination with areas of DFAT Level 4	Financial Delegated Approvers Level 3-7 (dependent on HR reporting lines); Insurance Office and SEG member *Copy of SEG member's written approval must be attached to PTA request

Section 5 - Policy Statement

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

Section 6 - 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 Business Travel intranet.

(8) Before planning any travel, staff should consider alternative options to travel including videoconferencing and where possible, reduce CO2 emissions by taking sustainable travel alternatives such as trains, trams, coaches, buses, University fleet or rental hybrid or electric vehicles.

(9) Staff can use the ICAO (International Civil Aviation Organisation) Carbon Emissions Calculator (CEC) (or similar tool) to calculate the carbon emissions for each trip.

(10) 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/Sustainable Alternatives

(11) 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.

(12) Travel alternatives should always be considered wherever possible to reduce our carbon footprint, for example:

a. teleconferencing;
b. videoconferencing;
c. travelling by train, tram, bus or coach (Use Public Transport Victoria Maps to plan your trip); or
d. University fleet or rental hybrid or electric vehicle.

(13) It is the responsibility of travellers and approvers to ensure that all alternatives have been explored. Learn more about sustainable travel at our Sustainability at La Trobe website.

(14) Travellers should avoid air travel for trips that would take less than four hours by rail or road transport and use alternative modes of transport such as rail, coach, bus, University fleet, or rental hybrid or electric vehicles where possible.

(15) 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

(16) 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.

(17) 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.

(18) Airfares and accommodation selected must be:

a. the lowest fare or rate of the day, taking into account the health, safety, and the practicality of the traveller's schedule;
b. booked through the University's travel booking tool as early as practicable to maximise cost savings. It is recommended to make optimal booking for all airfares is at least 3 weeks prior to departure.

(19) Consider the need to travel by air; minimise the total number of air trips where possible each year.

(20) When planning a trip:

a. choose a direct flight where possible,
b. check alternative airlines' reported emissions for the most direct route;
c. pack lightly; and
d. set a personal target to lessen your footprint for your next trip.

(21) University-related business does not include Outside Studies Programs. Outside Studies Program is designed to encourage and support academic staff in focusing on research and scholarship by providing them with a dedicated period free from regular duties. For details on criteria and how to apply for Outside Students Program refer to the Outside Studies program for Academic Staff Policy (OSP travel and accommodation does not need to be booked via the University's travel service provider but we recommend a pre-trip approval to be submitted for approval so the University has a record of the traveller's travel details).

(22) Travellers are required to understand their fare conditions for the purposes of ensuring best value is achieved.

(23) Refer to the Staff Travel Guidelines for more information.

Part C - Safety and Security

(24) 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 Level 4 destinations 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. When a request is submitted to travel to a DFAT Level 4 rated country,

the system will automatically notify the financial delegate approver, and your trip will be rejected.

(25) 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.

(26) To minimise risks whilst overseas, all travellers should research the destination country's laws, culture, 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 Smartraveller 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.

(27) For LGBTIQA+ staff and students, women travelling to countries with potential risks and staff and students with mobility disabilities, please refer to the Travel Guidelines for further information.

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

a. you must contact the Insurance Office to ensure you are covered by the University's travel insurance (insurance@latrobe.edu.au) to assist with their decision making process;
b. when submitting the Pre-Trip Approval request, written confirmation from the insurance office must be attached and the Financial Delegate Approver must carefully consider (in consultation with their SEG member) whether it is necessary to travel on behalf of the University to a DFAT Level 3 rated destination;
c. If a country is rated DFAT Level 3 but has areas that are rated DFAT level 4, then written approval from a SEG member must be attached to the travel request in the travel booking tool.

(29) Where an itinerary has been approved and 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 Insurance Office and their SEG member 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.

(30) 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 Financial Delegate Authoriser, Insurance and Security Office, and seek recommendation to continue their travel. The Financial Delegate Authoriser will contact their relevant SEG member to seek recommendation on whether the travel will continue or not.

(31) The University advises that all staff must:

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

DFAT Rating	Advice
Level 4	Do not travel Further information on staying safe and avoiding danger and destination DFAT ratings can be found on the Smartraveller website.

Part D - Number of Staff on Same Flight

(32) 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.

(33) It is preferable that no more than five (5) La Trobe University staff may travel together on the same flight either domestically or internationally.

Part E - Class of Air Travel

(34) All domestic travel will be economy class to minimise costs and reduce our carbon footprint. Economy class seats typically produce about one third of the carbon emissions of business class seats).

(35) Flexible class airfares, whether domestic or international, are only permitted when no lower-cost alternatives are available.

(36) Members of the Senior Executive Group (SEG) and the Chancellor may book Business class for flights of 8 hours or more.

(37) Premium Economy (or Business Class where the former is unavailable) may be selected on international air travel if:

a. the staff member's employment contract specifies the class of travel;
b. it is warranted on medical grounds and written approval from a SEG Member is granted
c. the staff member is required to travel on a frequent basis (5 or more times a year) are permitted to book Premium Economy (or Business class where the former is unavailable) on all trips with a single leg of 8 hours or more; or
d. the flight is externally funded.

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

a. within the Divisional budget; and
b. approved in writing by a SEG member. A written copy of the approval must be attached to the trip request for approval.

(39) Where Premium Economy or Business class flights are selected without prior approval from a SEG member, the staff member will be required to reimburse the University the cost difference between an economy flight and the Premium Economy/Business class fare purchased.

(40) Travel Authorisers must fairly assess staff requests for Premium Economy or Business class travel, consulting with the appropriate Dean or equivalent.

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

(42) For travel conducted 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.

(43) Staff may elect to personally pay or use Frequent Flyer points to upgrade an economy class ticket to a higher class of air travel. If an upgrade necessitates the purchase of a flexible fare base ticket, the traveller is responsible for privately funding the difference between the economy class ticket and the flexible fare base ticket.

Part F - Authorisation of Travel

(44) 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.

(45) 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/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.

(46) Where a trip has been approved via the University's booking tool, the actual cost of airfares and/or accommodation exceeds the amount approved by the Financial approver by:

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

then the travel consultant will be instructed that the trip can be booked.

(47) 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

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

(49) 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.

(50) 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.

(51) 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.

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

(53) 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

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

(55) The University recommends that staff book their family member/s air and accommodation themselves via their own travel agent or airline direct platform. Using the University Travel Management Company (TMC) to book family members' air and accommodation will incur the University's business rate schedule of fees per person, per booking. These costs are payable by the staff member personally and can add up quickly if you haven't already decided on the exact flights and accommodation required. The University's Travel Management Company provide 2 quotes for free and then the traveller will be required to pay quote fees on each quote the TMC provide after that. Refer to the Schedule of Fees for full costs that may be incurred by you for your family members.

(56) If family members require a different itinerary to the staff member, the traveller will be referred to our TMCs retail arm for booking family member's travel.

(57) The traveller will be requested to contribute 50% of the airfare costs if 50% or more of the total travel time is personal leave or private activities. Evidence, such as travel diaries, will be considered if there is a dispute.

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

(59) Queries about FBT implications should be directed to the Corporate Finance team, Office of the Chief Financial Officer and further information can be found in the Fringe Benefits Tax (FBT) Policy.

(60) In most circumstances, the traveller will fund all costs for non-employee travel companions, unless written approval is provided by the Provost, Deputy Vice-Chancellor (Research and Innovation), Deputy Vice-Chancellor (Academic), Deputy Vice-Chancellor (Future Growth), or equivalent level.

(61) 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.

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

Part I - Approved Accommodation

TSP-Booked Accommodation

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

(64) 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.

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

(66) 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.

Exceptions

(67) 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.

(68) 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. Conference hotels where a discounted rate has been negotiated as part of the conference;
e. Staff conducting "off-grid" fieldwork staying at purpose-built research stations or similar;
f. The TSP confirms that it has no relevant content nearby.

(69) In the situations outlined in the exceptions above, 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. Submits a request for approval via the Travel Booking Tool. The traveller must add the accommodation provider name and address in their request, and include an email from their direct supervisor approving their exemption so that location details are recorded in the Travel Booking Tool.
c. Has confirmation from the insurance office that they are covered under the University insurance policy or has alternate travel insurance in place.

Airbnb

(70) 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.

(71) 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.

(72) 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.

Responsibility of the traveller

(73) It is the responsibility of the traveller to:

a. 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 booking 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.
e. The traveller must submit a pre-trip request in Travel Hub adding a link to the Airbnb property. Refer to Travel Guidelines for the booking process.

(74) 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.

Part J - Ground Transportation

Ground Transportation Considerations

(75) 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. low carbon footprint
c. period of time for which the vehicle is required
d. length of the trip
e. safety
f. location – e.g. interstate or local

Ground Transport Alternatives

(76) 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.

(77) University Fleet Vehicle, being:

a. An Allocated Vehicle or Departmental Vehicle where available to the particular driver;
b. A Pool Vehicle
c. Car share vehicle
d. Rental Vehicle – Where it is impractical to use a University Fleet Vehicle, a hire vehicle may be arranged through the University's preferred rental company.
e. Uber/Taxi
    i. Where taxi or rideshare services are required, travellers should choose the safest and most cost effective option. To facilitate the University's legislative reporting requirements, Uber for Business or Cabcharge should be used in lieu of charging these expenses to corporate cards.
    ii. 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).
    iii. 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.

(78) 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.

(79) An employee may use their own vehicle, if no other vehicles (pool vehicles, car share vehicles or rentals) are available.

(80) Approval must be obtained from the employee's supervisor/manager (with the appropriate delegated financial authority) prior to use of a private vehicle.

(81) An employee with a disability may use their own vehicle if it has been fitted out specifically for their disability and University vehicles/rental vehicles cannot accommodate their requirements and do not need to obtain written supervisor/manager approval.

(82) 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

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

(84) 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

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

(86) Staff travelling overseas on University Business must ensure they hold a current and authorised passport and are responsible for checking whether they need a visa to enter a country. Use the CIBT Visa link on the Travel Hub to search country destinations and visa requirements.

(87) 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

(88) 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.

(89) In the event of an emergency or where travellers are concerned about their immediate health and safety whilst travelling, contact Zurich Assist (a 24 Hour Emergency Referral Service Call +61 2 8907 5671 and quote your policy number: Staff: 33 2351791 ZCT Students: 33 2351790 ZCT for immediate assistance.

Part N - Mobile Roaming

(90) 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.

This policy document may be varied, withdrawn or replaced at any time. Printed copies, or part thereof, are regarded as uncontrolled and should not be relied upon as the current version. It is the responsibility of the individual reading this document to always refer to La Trobe's Policy Library for the latest version.

Section 7 - Definitions

(91) 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. Externally funded: means paid for directly by a third party, and does not include grants or other means of indirect funding.
e. Head of Division includes Dean, Executive Director or equivalent level.
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 8 - Authority and Associated Information

(92) This Policy is made under the La Trobe University Act 2009.

Status and Details

Status	Current
Effective Date	19th December 2023
Review Date	30th June 2026
Approval Authority	Vice-Chancellor
Approval Date	19th December 2023
Expiry Date	Not Applicable
Responsible Manager - Policy	Andrew Peacock Executive Director, Procurement Business Services
Enquiries Contact	Finance

This policy document may be varied, withdrawn or replaced at any time. Printed copies, or part thereof, are regarded as uncontrolled and should not be relied upon as the current version. It is the responsibility of the individual reading this document to always refer to La Trobe's Policy Library for the latest version.