

Travel Policy

University of Canterbury

Category:	Financial Services
Last Modified:	October 2012
Review Date:	July 2013 (or more frequently as required)
Approved By:	Director of Finance
Contact Person:	Strategic Procurement Manager, Extn 7466

Introduction:

This Policy covers domestic travel, Trans Tasman travel, international travel, and the payment of travel expenses for all staff and students on University of Canterbury business.

Definitions:

Car Rental Provider – the University’s current preferred supplier for rental vehicles.

HOD – Head of Department

HOS – Head of School

Major Travel Expenses - flights, accommodation, Rental Vehicles.

Minor Travel Expenses - meals and incidentals, taxi charges, mileage claims, airport car storage and other reasonable minor expenses associated with travel.

Spendvision – the University’s financial approval and P-Card reconciliation system.

SMT – Senior Management Team

TMC – the University’s current contracted travel management company.

Traveller Profile – personal and professional information held on each traveller by the TMC.

UC – University of Canterbury

UC Traveller - University of Canterbury staff, students and visitors who are travelling and incurring University expenses.

Policy Statement:

This Policy applies to all travellers on University business where travel expenses incurred are to be funded by the University of Canterbury. This includes any travel on grants from any source.

The University of Canterbury will fund approved, ordinary, necessary and reasonable travel which is directly connected with the conduct of University business.

A balance must be sought when requesting travel. This is the UC's need for cost effectiveness and the employee's need for quality services and support. UC Travellers are to exercise prudent judgment regarding the minimisation of expenses covered by this Policy. When submitting claims for payment, UC Travellers are expected neither to gain nor to lose financially.

Any breach of this policy will constitute an act of misconduct and will be dealt with accordingly.

International Travel (outside trans-Tasman)

International travel on University business for staff to attend meetings, seminars and conferences outside Australasia will only be permitted where the travel and related activities directly contribute to achieving the agreed Key Performance Indicators of the Service Unit, Department or College, normally because the planned travel meets one or more of the following conditions:

- a) Activities to be undertaken while outside Australasia are part of the employee's normal duties as set out in his/her position description (e.g. international student recruitment);
- b) Conference or seminar provides demonstrable benefits to the University through the staff member updating knowledge, networking with peers or developing new skills;
- c) Conference or seminar attendance has been agreed for professional development purposes as part of the staff member's Professional Development and Review Process;
- d) Staff member is presenting a paper at a conference or seminar which provides demonstrable reputational benefit to the University and/or contributes to the professional or academic community of practice;
- e) Grant or funding explicitly indicates that travel is included, e.g. VC Staff Development Awards, study leave.

In all cases, it is expected that the Service Unit, Department or College has budgeted for such travel and that such support for travel is awarded in a transparent and equitable way against the above criteria. This latter requirement may be waived where the cost of the travel and/or conference is externally funded or subsidised.

Approval to travel must be sought and granted in advance from the staff member's Senior Management Team (SMT) member who may delegate this responsibility to the relevant HOD/HOS.

Applications should clearly specify the anticipated benefits of the planned travel and indicate which of the above conditions it satisfies.

A [staff travel form](https://intranet.canterbury.ac.nz/finance/forms/international_travel.pdf) for applications can be found on the Financial Services intranet. This form should be given to the relevant staff who will arrange purchase orders for travel on receipt of the approved form https://intranet.canterbury.ac.nz/finance/forms/international_travel.pdf

It is the University's policy to contract the travel management of its Major Travel Expenses to a travel management company. The benefits of outsourcing the management of Major Travel Expenses include but are not limited to:

- lower average travel costs for the University as a whole through capping of maximum fares based on consolidated quantity of travel;

- lower administration costs;
- an efficient and effective way for the University to perform its duty of care in tracking UC Travellers and ensuring insurance coverage and traveller wellbeing;
- improved transparency of use of University funds for travel; and
- improved reporting on all aspects of travel

Responsibilities

<ul style="list-style-type: none"> ▪ UC Traveller 	<p>Notify Travel Administrators as early as possible of necessary travel arrangements. If you notify the Travel Administrators of your travel requirements a minimum of 14 days in advance, your chances of minimising air travel costs are increased</p> <p>Prioritise the UC's requirements above private requirements (eg; attainments of frequent flyer miles) when requesting travel arrangements.</p> <p>Incur only expenses that are consistent with the business needs, and exercise care in determining appropriate expenditures</p> <p>Use UC authorized TMC and vendors the UC has negotiated supply contracts with.</p> <p>Adhere to all UC policies and rules.</p> <p>Take appropriate and reasonable steps for personal safety.</p> <p>Ensure all information in the Traveller Profile is kept current.</p>
<ul style="list-style-type: none"> ▪ Head of Department/School (or person with appropriate delegated budget authority) 	<p>Managers should know current travel policy and inform their departmental staff of company policy and procedures.</p> <p>Determine if travel is really necessary to achieve goal.</p> <p>Approve expenses accordance with relevant policies.</p>
<ul style="list-style-type: none"> ▪ The Director of Finance 	<p>The final arbiter of all issues relating to travel policy and practice.</p>

Procedures:

1. Major Travel Expenses: Flights, Accommodation, and Rental Vehicles

1.1. General

- a) For all quotations the TMC must be approached for a quote and all travel requirement instructions will be identical and issued at the same time with the same reply date and time to ensure a “level playing field”.
- b) All travel must have approvals as per clause 1.2 below prior to bookings being made.
- c) Any cancellation of bookings made via the TMC must be notified to the TMC as soon as practically possible to ensure mitigation of cancellation fees charged by the end service providers.
- d) Where a direct booking is made (i.e. not via the TMC) it is the travellers responsibility to cancel bookings within the service provider cancellation policy time frame. When cancelling bookings, a ‘cancellation number’ must be obtained. The UC is liable for service providers "no-show" fees

1.2. Approvals

- a) All major travel expenses must have prior approval from the UC Traveller’s relevant HOD/HOS or delegate. Approval for staff travel outside Australasia must have the relevant SMT member approval who may delegate this responsibility to the relevant HOD/HOS (see Policy Statement above).
- b) Bookings with vendors other than the TMC require prior approval from the Director of Finance who will delegate this authority to the relevant Procurement Services Analyst.
- c) All required UC Spendvision approvals must be gained before bookings are confirmed.

1.3. Flights – General

- a) All travel is to be on the lowest Economy Class fare available including Air New Zealand “Seat”, “Seat + bag”, or “The Works”. The only exceptions are when there is a relevant clause in an employment agreement or dispensation is obtained from the Director of Finance with suitable medical evidence supporting the request
- b) Airline complimentary fare upgrades at no additional cost to the University, or using personal airline loyalty club points for upgrading are acceptable.
- c) No more than five (5) UC staff, or two (2) UC SMT members may fly on the same flight.

1.4. Flights - International

Quotes may be obtained from any suppliers but the TMC must be represented in the quotes obtained as per clause 1.1., above.

1.5. **Flights** - Trans Tasman and Domestic:

Quotes must be obtained via the UC’s contracted TMC. Airline websites may be accessed directly only to advise the TMC of preferred options.

1.6. Accommodation (including breakfast)

- a) All UC booked accommodation must meet with industry accepted business travel standards with reference to comfort, convenience and cost.
- b) The UC's preferred suppliers (as per the UC travel webpage) are to be used as a first preference.
- c) Where the University books accommodation directly with an accommodation provider, the University is responsible for payment i.e. this cannot be charged back to the TMC.
- d) With the exception of conference accommodation, the UC and TMC are not responsible for accommodation fees more than NZ\$200 (GST excl) base rate for domestic bookings, unless approved by the Director of Finance who will delegate this authority to the relevant Procurement Services Analyst. Conference Accommodation is defined as where a traveller is attending a conference and staying in the same site in which the conference is being held.
- e) The traveller is responsible for confirming that the rate being charged is also the rate listed on the travel itinerary. Any discrepancies should be reported immediately to the TMC.

1.7. Meals including snacks

- a) Where a traveller has overnight accommodation booked by the University, the University will fund reasonable meals but all alcoholic beverages must be privately purchased. Note – only accommodation and breakfast are currently approved for charge-back to the TMC and a P-Card should be used for additional appropriate meals.
- b) Where a traveller is in a country that requires a service tax or gratuities be added to invoices, the University will fund up to 15% of the bill for sales tax for this purpose.
- c) "Snacks are defined as morning and afternoon tea (excluding beverages as per employment contracts). Snacks will not be funded by the University."

1.8. Entertainment

Entertainment expenses are to be in accordance with all relevant UC policies and rules.

1.9. Laundry Service:

Where a traveller is away from home for more than seven (7) consecutive nights or if a trip has been unexpectedly extended, actual and reasonable laundry expenses will be accepted as part of hotel charges. Note – only accommodation and breakfast are currently approved for charge-back to the TMC and a P-Card should be used for appropriate laundry charges.

1.10. Rental vehicles

- a) Staff must use a UC pool vehicle if one is available. If a UC pool vehicle is not available the UC Rental Vehicle Provider may be utilised. Where appropriate, travel using private vehicles and claiming mileage should be exercised where possible if it is the more economical option to do so.
- b) The use of a rental vehicle must be justified as an economical need and not as a matter of personal convenience. Vehicles should be rented only when public transportation and taxis are impractical, more expensive or not available.

- c) The UC's preferred suppliers (as per the UC travel webpage) are to be used as a first preference.
- d) When a rental vehicle is necessary, the UC's preferred Supplier should be utilised. Information regarding the UC's preferred supplier is available on the UC's travel webpage <https://intranet.canterbury.ac.nz/travel/?s=i-home>
- e) Where the UC's Rental Vehicle provider is not able to provide an appropriate vehicle and the University subsequently books rental vehicles directly with another provider, the University is responsible for payment and any charges are not to be referred to the TMC.
- f) The UC's insurance package covers employees while travelling. Therefore, the optional insurance cover offered by the rental car company should be declined. In the event of an accident while travelling, you must follow all relevant UC procedures.
- g) Travellers must request the smallest vehicle appropriate for their requirements. Rentals for other types of vehicles are not permitted except with Director of Finance or their delegates approval. Where this approval is not provided, luxury, premium and specialty car rentals will be funded only at the smallest appropriate vehicle rate and any different in fees is the direct responsibility of the traveller at the time of payment.
- h) GPS is permissible if the traveller is travelling to an unfamiliar location.
- i) Wherever possible employee must refill fuel prior to returning rental vehicles for drop off. Fuel charges at rental company locations are considerably more expensive than at petrol stations.

1.11. Payments

- a) Bookings made with the TMC will be automatically charged to the College or Service Unit Travel Card.
- b) Bookings made directly with any other service provider are to be paid by purchase order or P-Card in accordance with relevant policies and rules of use.
- c) Reimbursement for bookings made by personal funds will be in accordance with the Sensitive Expenditure Policy.
- d) There will be no reimbursement for bookings made by airline loyalty club points.
- e) University funds from whatever source may not be used to purchase carbon credits from airlines at this time. The strategy going forward will be decided by SMT in the future.

1.12. Airline Loyalty Points (e.g. Airpoints)

- a) University funds from whatever source may not be used to join airline loyalty programmes.
- b) Loyalty points accrued on University travel are credited to individual UC Travellers, but it is expected these points will be used for University-related travel where at all possible. Refer also to the Sensitive Expenditure Policy.

1.13. Airline Club Membership Fees (e.g. Koru Club) – Koru Application Form

- a) University funds from whatever source may not be used for individual airline club memberships except where approval is given by the relevant SMT member. SMT members may grant a membership if:

- the staff member is required to travel in a University capacity on a frequent basis; and
 - the Department/School/Unit has sufficient budget to incur the costs of such membership.
- b) Or, the membership is part of a formal employment contract between the University and an employee.
- c) Should a staff member's employment be terminated with the University, where allowed by the membership rules, the membership must be cancelled and refunded to the relevant departmental budget.

1.14. Travel to Conferences

- a) Conference travel and accommodation bookings (accommodation and breakfast) should be made through the TMC or directly with conference organisers. Any travel not booked via the TMC may not be invoiced back to the TMC.

1.15. Personal Travel as a Component of University Travel

- a) Personal travel will not be funded by the University, but can be booked with the TMC to receive advantages of the rates negotiated by the University. Where personal travel is incorporated into University travel, the traveller shall obtain a quote for the University portion of travel excluding any allowance for personal travel. This quote will form the basis for the portion of travel to be funded by the University.
- b) Where family members are travelling with a UC Traveller who is travelling on University business:
- all expenses incurred by the UC Traveller's family are classified as personal travel. The UC Traveller's own travel expenses on University business will be covered by the University in accordance with this Policy.
 - the UC traveller shall obtain a quote for the University portion of travel excluding any allowance for personal travel. This quote will form the basis for the portion of travel to be funded by the University.

1.16. Partner Travel

Travel expenses for a spouse are classified as personal travel unless it can be shown that the spouse's presence is both essential and directly related to the effective accomplishment of University business. In these limited instances, the employee must obtain written approval in advance from the relevant SMT member.

2. Insurance Coverage

2.1. International Travel:

The University has a comprehensive corporate travel insurance policy in place which covers all overseas business travel. No UC Traveller shall make arrangements for insurance cover outside University arrangements. All international travel booked through the TMC is automatically covered by the University's Corporate Travel Insurance Policy. Travellers who make international travel bookings through other vendors will need to contact Financial

Services by filling in the Insurance Activation Form located on the UC Insurance website and emailing to insurance@canterbury.ac.nz .

2.2. Domestic Travel:

The University does not provide domestic travel insurance except for the loss of University effects during travel which is covered under the University's Material Loss Policy, but note that the excess/deductible on this is NZ\$2,500. For further information about the University's deductibles, please view the University's Insurance website.

2.3. Domestic Rental Vehicles:

The University has a comprehensive corporate travel programme in place which covers all approved domestic vehicle rentals. All car rentals booked through the TMC are automatically covered by the University's Corporate Travel Programme. Rental vehicle bookings made through other vendors will need to be logged with Financial Services by emailing insurance@canterbury.ac.nz.

2.4. International Rental Vehicles:

The University's Corporate Travel Programme is limited and only covers for the excess/deductible up to NZ\$5,000. For assistance with arranging international insurance cover, please contact Financial Services by emailing insurance@canterbury.ac.nz.

3. Risk Assessment and Personal Safety

3.1. The UC takes its responsibilities under 'duty of care' to its travellers seriously and as such subscribes to the International SOS service. Information regarding this service is available via the UC's travel webpage.

3.2. Risk Assessment:

- a) If travelling overseas, the UC Traveller must check the [ISOS website](#) available via the University's travel webpage <https://intranet.canterbury.ac.nz/travel/> to assess risks associated with intended destination.
- b) SMT approval is required for unavoidable travel to a [High Risk \(Hotspot\)](#) destination as stated on the UC Insurance website. The [Overseas Travel to Extreme Risk or High Risk Destinations form](#) must be completed prior to travel.

If travel to a 'risk' destination is absolutely necessary, insurance costs may be excessive and will be on-charged to the UC Traveller's department or school.

3.3. Field Activities

Prior to departure, the UC Traveller must ensure they have followed the information on preparing for a field activity, located on the H&S Toolkit in the [Hazard Management section](#), to determine what information must be completed prior to departure. There are field activity matrixes to assist the sole participants or for the leader organising a Group and clarification can be provided through the Health and Safety Team.

3.4. Personal Safety

Where any UC traveller finds themselves in a situation where their personal safety is at risk, they are to take all steps necessary (including use of the International SOS service) to remove themselves from the situation. Where a UC P-Card is required to make this happen, this use is approved however full explanation of how the situation arose and the steps taken to mitigate it is to be provided to the Director of Finance or their delegate.

4. Minor Travel Expenses: Meals & Incidentals, Taxi Charges, Mileage Claims, and Other Expenses

4.1. Approvals

Minor Travel Expenses require prior approval from the UC Traveller's HOD/HOS.

4.2. Taxis:

Payment for taxis within Christchurch for travel by UC staff (e.g. from residence to airport) shall not exceed NZ\$50 being the amount to travel by taxi from the UC (considered the 'normal place of work' for the purposes of this policy) to Christchurch Airport.

4.3. Payments

- a) The University P-Card must be (except in extraordinary circumstances) be the primary method used to pay for Minor Travel Expenses.
- b) Where it is not possible to use a P-Card for payment, actual and reasonable costs reimbursements will be applied in accordance with the UC's Sensitive Expenditure Policy. The following Minor Travel Expenses may be reimbursed:
 - Accommodation that cannot be paid using a P-Card.
 - Telephone calls and internet charges - University business only.
 - Parking Charges - but not parking fines or traffic offence notices.

4.4. Per Diem Allowance:

The only allowable Per Diems are those that are in employment contracts.

4.5. Mileage of private vehicles:

- a) UC Travellers travelling on University business using their private vehicles may be reimbursed using the UC staff mileage claim rates.
- b) Any claim cannot exceed the equivalent value of an economy airfare (with reasonable booking notice) or rental car equivalent, to the same destination, whichever is lower.
- c) UC staff mileage claim rates, unless otherwise specified by employment contracts, are paid as per the appropriate IRD motor vehicle mileage rates.
- d) Each Department/School/College is required to keep a running total of mileage claimed each calendar year.

- e) Complete the Payment Request Form to apply for reimbursement of actual and reasonable costs.

4.6. Items not funded by UC include but are not limited to:

- a) Airline stopover charges (additional airfare, lodging, etc.) when made for personal convenience.
- b) Car rental charge over appropriate vehicle sized rate (unless prior approval has been granted).
- c) Driver's license issuance or renewal fees.
- d) Laundry and dry-cleaning expenses for trips lasting less than seven days.
- e) Purchase of alcohol.
- f) Luggage (claim for damage to personal property must be filed with the transportation carrier).
- g) Personal credit card membership dues, fees or charges including liability insurance for lost card or use by third parties.
- h) Personal expenses (eg; toiletries, barber, masseur, city tours, personal entertainment, etc.).
- i) Telephone charges from airplane.
- j) Traffic fines, parking violations and court costs.
- k) Unauthorised trips or entertainment.
- l) Unreasonable meal expenses
- m) In-room movies or mini-bar services.

5. Travelling on a Grant

5.1. Conference Grant-in-Aid

Once a conference study Grant-in-Aid has been approved, funds can be used for airline bookings, conference registration and accommodation. Where funds are limited and do not cover costs they may be drawn in advance.

5.2. Study/Sabbatical Leave

Any travel booking must comply with the University's Travel Policy. Refer to your Human Resources Advisor or view Policies and Procedures in the HR Toolkit.

5.3. Erskine/Cambridge/Oxford Grant

Erskine/Oxford Grant rules may differ from the above. Please contact the Erskine Programme Office, or email erskine@canterbury.ac.nz for further details.

Related Policies, Procedures and Forms:

- [Staff Travel Form](#)
- [International Travel and Expenses](#)
- [International Travel Insurance](#)
- [Overseas Travel to High Risk or Extreme Risk Destinations \(Hotspots\)](#)
- [Quality Performance Agreement](#)
- [Sensitive Expenditure Policy](#)
- [UC Insurance website](#)
- [HR Toolkit – Field Activities Protocol](#)

Version Control Table		
Action	Approval Body	Date Amended
Full Review	Chief Financial Officer	19 March 2008
Modification – new process for non-APX Trans-Tasman and Long Haul travel	Chief Financial Officer	11 April 2008
Modification – amendments to flow chart in the Appendices, and minor changes to 2.2 Payments	Chief Financial Officer	14 May 2008
Modification – amendments to international per diem rates. Deleted South East Asia, and added Japan	Chief Financial Officer	24 June 2008
Full Review New form and approval process for travel outside Australasia. Increase in the mileage rate.	Chief Financial Officer	14 August 2009
Minor change relating to 1.4 Payments. Additional sentence included: “ <i>University funds from whatever source....</i> ”	Chief Financial Officer	12 April 2010
Amendment to reflect change in travel provider	Chief Financial Officer	30 July 2010
Full review with significant changes.	Chief Financial Officer	12 September 2011

Review and addition of section 3.3 Field Activities.	Chief Financial Officer	27 February 2012
Amendment <i>Minor changes – alcohol and membership</i>	Chief Financial Officer	9 October 2012

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