

Travel Policy

University of Canterbury

Category: Financial Services
Last Modified: August 2009
Review Date: August 2010 (or more frequently as required)
Approved By: Chief Financial Officer
Contact Person: Operations and Procurement Services Manager, Extn 8284

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:

Major Travel Expenses - flights, accommodation, rental cars.

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

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

APX (Atlantic Pacific American Express) – the University’s current contracted travel management company.

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

Policy Statement:

This Policy applies to all travel 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.

UC Travellers are to exercise prudent judgment regarding expenses covered by this Policy. When submitting claims for payment, UC Travellers are expected neither to gain nor to lose financially.

Staff International Travel (outside Australasia)

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, or in the case of a College, a Head of Department or School if delegated by a Pro-Vice-Chancellor.

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

A new [staff travel form](#) 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.doc

It is the University's policy to contract the travel management of its Major Travel Expenses to a travel management company. APX currently holds this contract. The benefits of outsourcing the management of Major Travel Expenses are:

- 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.

Responsibilities

▪ UC Traveller	Ensures adherence to this Policy.
▪ Head of Department/School (or person with appropriate delegated budget authority)	Ensures UC Travellers have adhered to this Policy and any other relevant policies before approval of travel activity and expense claims.
▪ The Chief Financial Officer	The final arbiter of all issues relating to travel policy and practice.

Procedures:

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

1.1 Quotations

For all quotations APX should be the first company approached for a quote and all travel requirement instructions should be the same for each supplier to ensure a “level playing field”.

- a) International flights: Quotes may be obtained from any suppliers but APX must be represented in the quotes obtained.
- b) Trans Tasman and domestic flights: Quotes may be obtained from APX or bookings made directly from airline websites.
- c) Accommodation (including breakfast): Quotes may be obtained from any suppliers but APX must be represented in the quotes obtained except when accommodation is part of a conference package.
- d) Rental cars: Quotes may be obtained from any suppliers but APX must be represented in the quotes obtained. Travel using private vehicles and claiming mileage (refer clause 2.2 (e)) should be exercised where possible if it is the more economical option to do so.

1.2 Approvals

- a) All major travel expenses must have written 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 (see Policy Statement above).
- b) Bookings with vendors other than APX (except Trans Tasman and domestic flights booked directly with airline websites) require prior approval from the Financial Services Operations and Procurement Services Manager.
- c) Approvals for such bookings are only granted when the vendor, apart from APX, clearly shows a savings of at least 5% compared to APX’s quote on the exact same travel details.

1.3 Bookings

- a) All travel must have approvals in accordance with clause 1.2 above and 1.11 below prior to bookings being made.
- b) Trans Tasman and domestic flights may be booked with APX or directly from airline websites.

1.4 Payments

- a) Bookings made with APX will be automatically invoiced to the University.
- b) Bookings made through airline websites are to be paid by P-Card.
- c) Bookings made with vendors other than APX, once quotes are approved, may be paid via purchase order or P-Card depending on the cost of the purchase.
- d) There will be no reimbursement for bookings made by personal funds or airline loyalty club points.

1.5 Travel Ticket Class

- a) All travel is to be on the lowest Economy Class fare available. The only exceptions are when there is a relevant clause in an employment agreement or dispensation is obtained from the Chief Financial Officer 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.

1.6 Airline Loyalty Points (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.

1.7 Airline Club Membership Fees (e.g. Koru Club)

- 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 at least six times per year;
 - 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, the membership must be transferred to a replacement staff member or cancelled and refunded to the relevant departmental budget.

1.8 Travel to Conferences

- a) Conference travel and accommodation bookings (accommodation and breakfast) should be made through APX or directly with conference organisers.

1.9 Personal Travel

- a) Personal travel will not be funded by the University, but can be booked with APX to receive advantages of the rates negotiated 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.

1.10 Partner Travel

- a) 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.

1.11 Insurance Coverage

- a) *International Travel* – The University has a comprehensive corporate travel insurance policy in place which covers all overseas business travel. No UC Traveller should be making arrangements for insurance cover, or be looking to make alternative arrangements outside University arrangements. All international travel booked through APX using a purchase order is automatically covered by the University's Corporate Travel Insurance Policy. Travellers who do not use a purchase order, or who make international travel bookings through other vendors will need to contact the Planning, Information and Reporting Unit by filling in the **Insurance Activation Form** located on the [UC Insurance website](#).
- b) *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 \$2,500. For further information about the University's deductibles, please view the University's Insurance website.
- c) *Domestic Rental Cars* – The University has a comprehensive corporate travel programme in place which covers all approved domestic car rentals. All car rentals booked through APX are automatically covered by the University's Corporate Travel Programme. Rental car bookings made through other vendors will need to be logged with the Policy and Risk Officer (PIRU) on (03) 364-2204 or internally on Extn 6204 to ensure coverage. No UC Traveller should be making their own arrangements.
- d) *International Rental Cars* – The University's Corporate Travel Programme is limited and only covers for the excess/deductible up to NZ\$5000. For assistance with arranging international insurance cover, please contact the Policy and Risk Officer (PIRU) on Extn 6204.

1.12. Risk Assessment

- a) If travelling overseas, the UC Traveller must check the [SOS website](#) to assess risks associated with intended destination.
- b) Appropriate 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.

Please note that 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.

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

2.1 Approvals

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

2.2 Payments

The University payment methods for Minor Travel Expenses are:

- a) *University P-Card* – This should be the primary method used to pay for Minor Travel Expenses. Where it is not possible to use a P-Card for payment, actual and reasonable costs reimbursements will be applied. Complete the [Payment Request Form](#) to apply for reimbursement of actual and reasonable costs.
- b) *Travel Advance* – Advances are available to employees travelling internationally who expect to incur out-of-pocket expenses. Travel advances may not be issued more than two weeks before the expected travel date. UC Travellers using a travel advance will need to verify their spending with receipts at the end of the travel period and return any unused amount to the University.

Advances may be arranged by completing a [Travel Advance Form](#) and sending to Financial Services for approval.

- c) *Per Diem Allowance* – This is a set daily allowance payable only to UC Travellers who are University staff members. If a per diem allowance is approved and paid to the UC staff member, all Minor Travel Expenses are to be paid out of the allowance.

When requesting a per diem allowance, please attach relevant information relating to the travel, such as a copy of your itinerary and conference registration form and send the application to Financial Services for approval.

Per diem allowances may not be granted in conjunction with other methods of payment or allowance.

As outlined above, staff need to choose, on a trip-by-trip basis, either their P-Card or a per diem allowance for expenses, other than air travel and accommodation (including breakfast). In a limited number of situations, it will not be possible for staff who have chosen the P-Card option to use their card. In these circumstances, staff should submit receipts for reimbursement, along with their P-Card reconciliation.

Per diems are paid in New Zealand dollars equivalent to the set rates below.

▪ **International travel per diem rates:**

Australia	\$AUD80.00
Europe, UK, USA, Canada, Japan and South America	\$USD65.00
Other overseas destination/s	\$USD45.00
Private lodging where costs are incurred	\$NZD66.45

▪ **Domestic travel per diem rates:**

The period of payment starts and finishes with departure from or return to the University or place of residence, whichever is earlier. The per diem is only to be used to cover periods of travel up to approximately two weeks.

If lodging in a hotel/motel:

Each full 24 hours of travel	\$NZD75.00
Each 10 hours on top of a full 24 hours of travel	\$NZD75.00
Periods of less than 10 hours on top of full 24 hours of travel	\$NZD35.00

Or if lodging in a private home:

Each full 24 hours of travel	\$NZD75.00
Each 10 hours on top of a full 24 hours of travel	\$NZD75.00
Periods of less than 10 hours on top of full 24 hours of travel	\$NZD35.00

- e) *Reimbursements following Claims* – Reimbursements are made on actual and reasonable expenses paid that are supported by original paid tax invoices for amounts of \$NZD50 or more. Claims must be approved by the HOD/HOS/Manager, or, if the claimant is an HOD/HOS, the College Manager. The employer determines actual and reasonable costs.

The following Minor Travel Expenses may be reimbursed:

- Accommodation that cannot be paid using a P-Card.
- Telephone calls - University business calls only.
- Parking Charges - but not parking fines or traffic offence notices.
- Entertaining in private residences.
- Mileage of private vehicle: UC Travellers travelling on University business using their private vehicles may be reimbursed using the UC staff mileage claim rates below. The 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.
 - UC staff mileage claim rates, unless otherwise specified by employment contracts, are paid as per the appropriate IRD motor vehicle mileage rates. The current rate of 70 cents per kilometre applies.
 - UC student mileage claim rates, not less than 26 cents per kilometre and not more than 45 cents per kilometre.

Each Department/School/College is required to keep a running total of mileage claimed each calendar year.

3. Travelling on a Grant

3.1 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.

3.2 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](#).

3.3 Erskine/Cambridge/Oxford Grant

a) 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](#)
- [Air New Zealand Fares](#)
- [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](#)

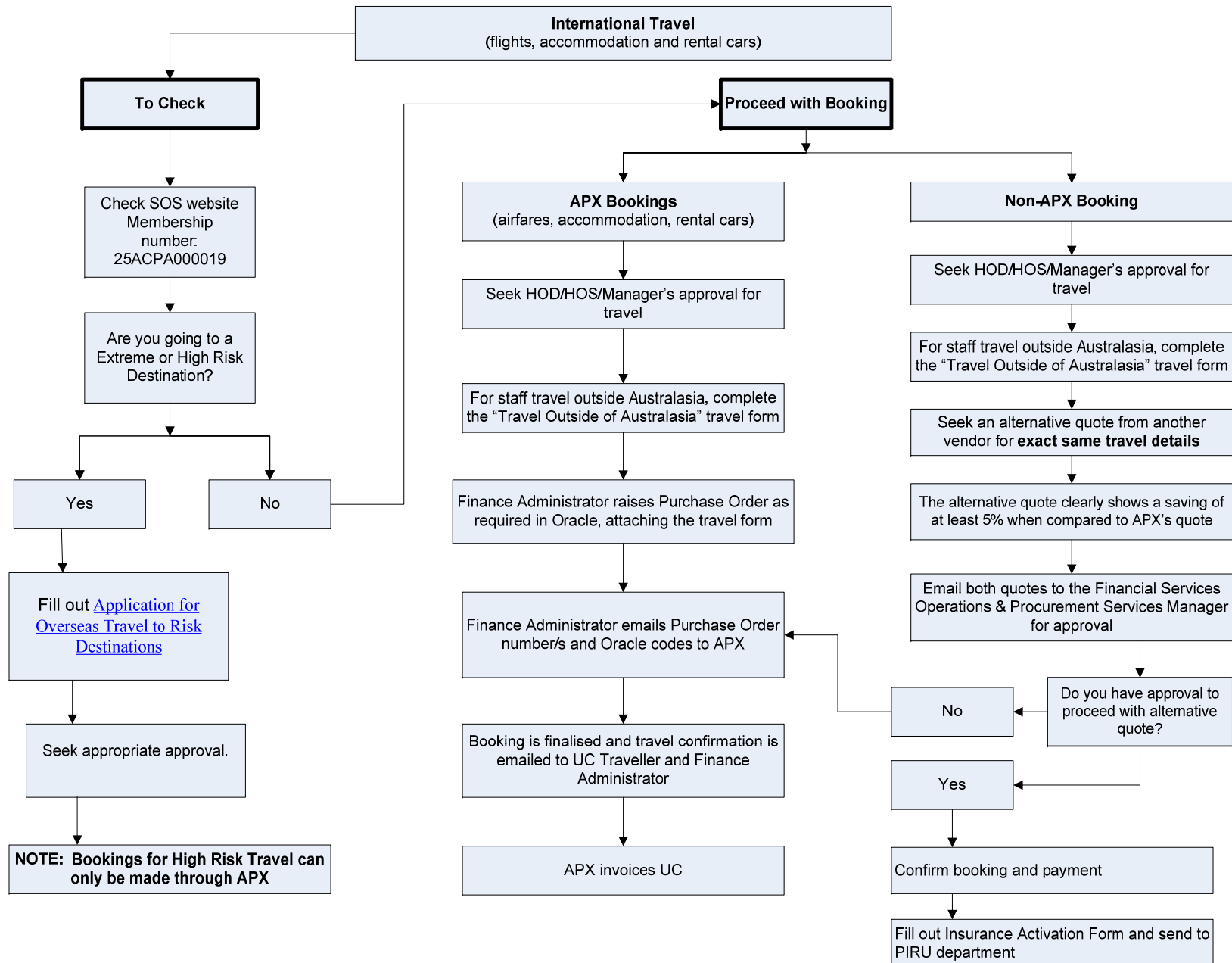
Appendices:

- **Appendix A** – Standard Operating Procedures (SOPs) for Major Travel Expenses except Trans Tasman and domestic travel tickets.
- **Appendix B** – SOPs for Major Travel Expenses: Trans Tasman and domestic travel tickets.
- **Appendix C** – SOPs for Minor Travel Expenses.
- **Appendix D** – SOPs for travelling on a Grant

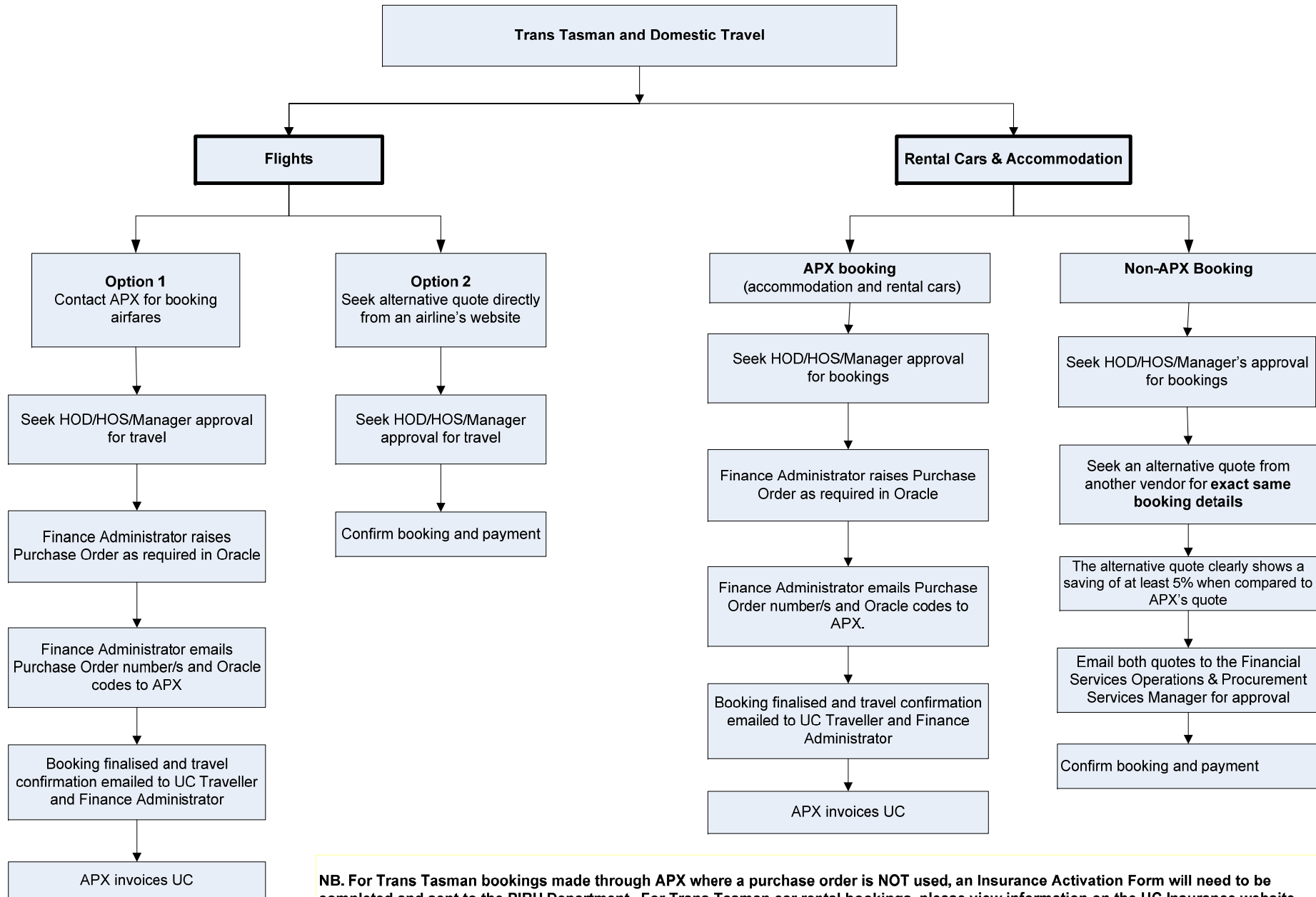
Version Control Table		
Action	Approval Body	Date Amended
Full Review	Chief Financial Officer	19 March 2008
Modification – new process for non-APX Trans-Tasman and Long Haul travel	Chief Financial Officer	11 April 2008
Modification – amendments to flow chart in the Appendices, and minor changes to 2.2 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

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Appendix A – Standard Operating Procedures for Major Travel Expenses (International)

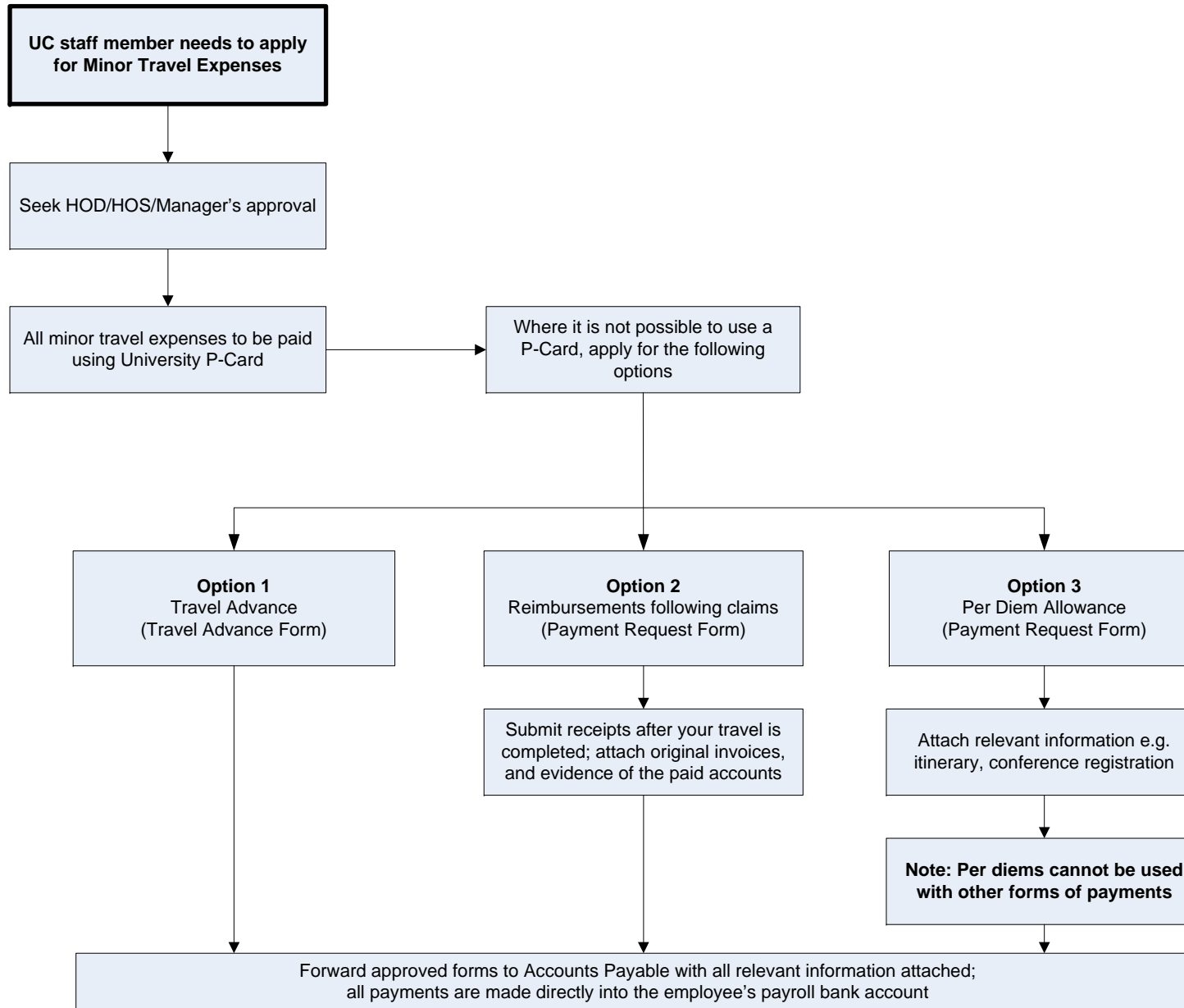


Appendix B – Standard Operating Procedures for Major Travel Expenses (Trans Tasman and Domestic)

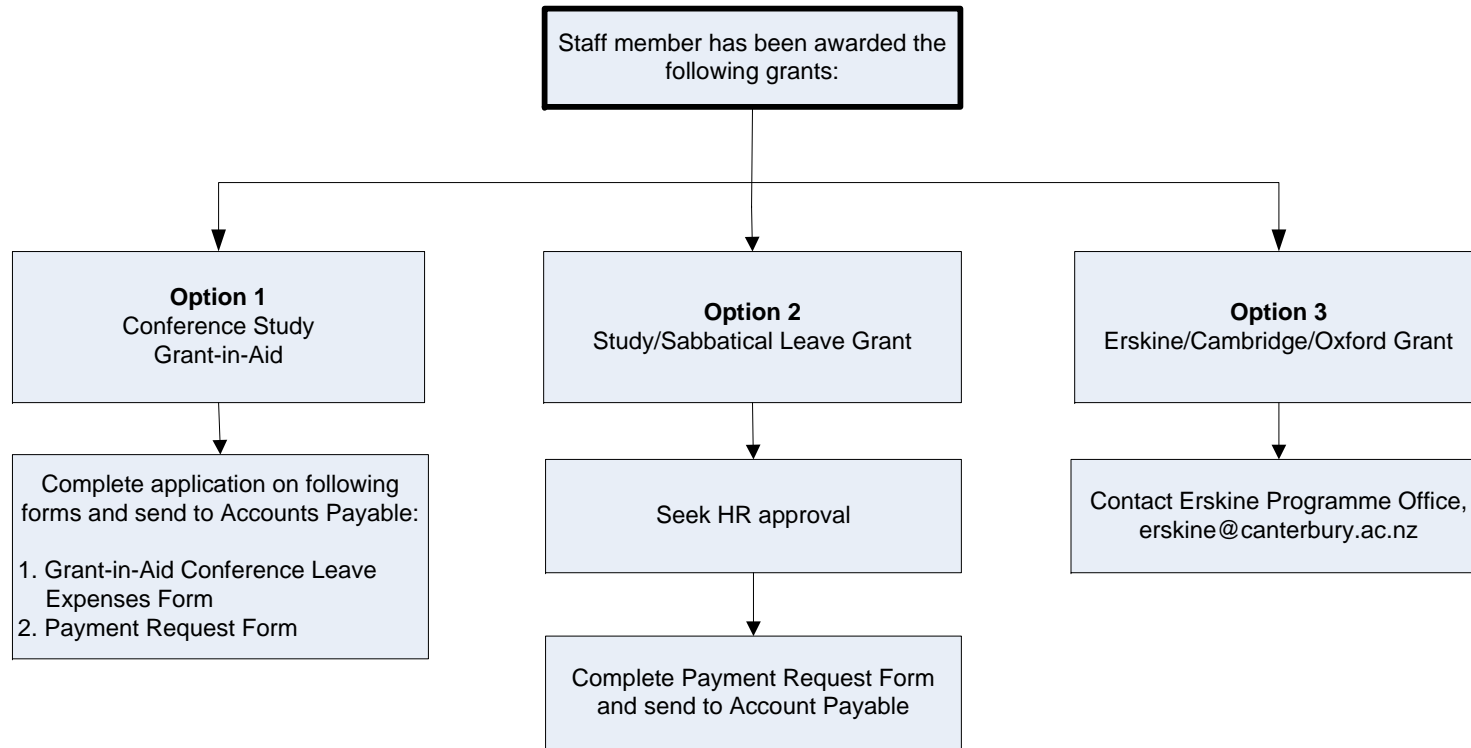


NB. For Trans Tasman bookings made through APX where a purchase order is NOT used, an Insurance Activation Form will need to be completed and sent to the PIRU Department. For Trans Tasman car rental bookings, please view information on the UC Insurance website.

Appendix C – Standard Operating Procedures for Minor Travel Expenses



Appendix D – Standard Operating Procedures for Travelling on a Grant



Note: Standard Operating Procedures for Major and Minor Travel Expenses applies (see Procedures section in this Policy)