

Policy: Travel

Policy Statement

The Board of Trustees recognises its responsibilities as a good employer to ensure that all staff are adequately recompensed for travel. Travel under this policy covers all local travel not specified in the Teachers' Collective Contract current at the time of the claim, and staff allowance for international travel. Travel costs for destinations outside the Auckland metropolitan area are by negotiation with the Principal prior to travel commencing.

Introduction

- The Board agrees that it has a responsibility to ensure that travel expenditure incurred by the School must clearly be linked to the business of the School. The Board has agreed on the fundamental principles of this Policy, and has delegated responsibility for the implementation and monitoring of this Policy to the Principal.
- The Board requires the Principal, as the chief executive and the Board's most senior employee, to implement and manage this Policy. The Principal may, from time to time, further delegate some of their responsibilities, and all such delegations must be attached as appendices to this Policy.
- This Policy must be read in conjunction with other Board policies, and the exercising of all authority and responsibilities conferred under this Policy must be in accordance with the Schedule of Delegations and may not exceed an individual's established level of delegated authority.

Principles

The Board agrees to ensure that:

- The travel expenditure is on the Board's business, and the School obtains an acceptable benefit from the travel when considered against the cost
- Expenses are reimbursed on an actual and reasonable basis, and
- Staff that are required to travel on business do not suffer any negative financial effect

Process for making travel arrangements

- Under no circumstances may any staff member approve their own travel.
- All bookings for international and domestic travel are to be conducted through the School's normal purchase procedures. This includes the booking of accommodation, flights and rental cars.

Travel within New Zealand

- Travel will be paid out at the non-taxable rate set from time to time by the Secondary Teachers' Collective Agreement.
- Travel claims are to be submitted to the Business Manager for the Principal's approval.
- If travelling over 100km one-way, reasonable fuel costs will be reimbursed, rather than mileage rates.

Travel may be claimed as follows:

- From home to the venue (eg sport, professional development course, school related activities, etc)

- From the actual point of departure (eg sporting fixtures immediately after school generate a claim from school to the venue and return to school).
- From home to the school when the teacher needs to return to the school after hours for an event (eg drama/musical production, sports fixtures, school related activities, etc).

International Travel

- Prior to international travel being undertaken, the traveller must be given a copy of this Policy and be required to sign it off to signify that they have read and understood it. The traveller must meet with the Business Manager and /or Accounts Technician to explain trip and budget and must set milestone meetings before the trip takes place to monitor the financial.
- All international travel should be authorised by the Board before it is commenced. A proposal must be put to the Board detailing the purpose of the trip, the expected benefit to the School, which will arise from the trip and an estimate of the costs of the trip. The Board will approve the travel in writing.
- At the end of the trip overseas, the traveller must prepare a trip report, which details the costs incurred during the trip, activities which took place during the trip and the benefits to the Board and the School of the trip.

Accommodation

- Staff should opt for good but not superior accommodation, for example Qualmark 2-star accommodation, and must be prepared to justify exceptions to this rule to the Board.
- Staff who stay privately will be reimbursed on production of receipts, for koha or for the cost of a gift given to the people they have stayed with. Prior to travel the staff member should receive authorisation for the value of the intended koha/gift. (Refer to gift policy.)

Vehicles

- When using rental cars, staff should opt for good but not superior model vehicles and should be prepared to justify any exceptions to this rule to the Board.
- Use of private vehicles is to be approved on a one-up basis and reimbursement will be at the rate specified by the Secondary School Teacher Collective Agreement.
- If taxis are used, then staff should pay for the taxis out of their own pocket, obtain a receipt and seek reimbursement through petty cash or as part of an expense claim.

Reimbursement of expenses

- The reimbursement for business related travel expenses is on the basis of actual and reasonable costs. Actual and reasonable expenditure is defined as “the actual cost incurred in the particular circumstance, provided that it is a reasonable minimum charge”.
- For travel within New Zealand, actual and reasonable expenses are those incurred above the normal day-to-day costs. For example, a staff member would normally incur personal expenditure for lunch on a daily basis and the cost of lunch when travelling should not be reimbursed unless the costs are greater than that normally incurred.
- All personal expenditure is to be met by the staff member. Examples of this are mini bar purchases, in-house movies, laundry and private phone call charges. These are to be paid separately by the travelling staff member.
- All receipts must be retained and attached to the travel claim. The claim is to be authorised on a one-up basis.

- For expenditure incurred in New Zealand of value greater than \$50 (including GST) there should also be a GST invoice to ensure that GST can be reclaimed by the School.
- Authorisation can still be given for expenditure less than \$50 where there is no receipt, for example if it is not practical to obtain a receipt or if the receipt is lost. The expenditure can be reimbursed provided there is no doubt about its nature or the reasons for it.

Discretionary travel benefits

- Travel benefits, including Airpoints and loyalty scheme rewards/points (Fly Buys, Global, etc), accrued from official travel are only to be used for subsequent travel on behalf of the School. They should not be redeemed for personal use.
- Staff must travel by the most direct route unless scheduling dictates otherwise.
- The School will not meet expenses incurred on behalf of a spouse or travelling companion. In the event of a person travelling with an employee, a reconciliation of expenses should clearly demonstrate that the School did in no way incur additional expenditure.

Approval

- When the Board approved this Policy, it agreed that no variations of this Policy or amendments to it can be made except with the unanimous approval of the Board.
- As part of its approval, the Board requires the Principal to circulate this Policy to all staff, and for a copy to be included in the School policy manual, copies of which shall be available to all staff. The School policy manual shall also be made available to students and parents at their request. The Board requires that the Principal arrange for all new staff to be made familiar with this Policy and other policies approved by the Board.

Review schedule: **July 2022**

ADOPTED BY BOARD OF TRUSTEES			
Date	30 July 2003	Chairperson	M J Bailey

AMENDED	Date	24 August 2005	Chairperson	S Smith
AMENDED	Date	24 September 2008	Chairperson	S Smith
AMENDED	Date	26 September 2011	Chairperson	S Smith
AMENDED	Date	27 March 2017	Chairperson	S Smith
AMENDED	Date	29 July 2019	Chairperson	S Smith
REVIEWED/AMENDED	Date	Chairperson
REVIEWED/AMENDED	Date	Chairperson

Signature section for international travellers.

I have read and understood this policy and agree to abide by it.

Signed