



Glendowie School Travel Policy

Rationale


1. 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.
2. The Board requires the Principal, as 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.
3. 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.

Guidelines

1. 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.
2. Staff members may not approve their own travel.
3. 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.
4. The justification for travel within New Zealand must be documented. It is to be transparent and must relate to a school need. Travel within New Zealand is to be authorised on a one-up basis (for example, the Principal should authorise any travel by the Deputy Principal, and the Board should authorise any travel by the Principal).
5. All domestic air travel is to be economy class.
6. Any International or domestic travel on school business should have the appropriate insurance for that trip paid for by the School
7. Prior to international travel being undertaken, the Board must have received detailed information about the travel in accordance with the Board's Sensitive Expenditure Policy and the overseas travel checklist
8. 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.

9. 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.
10. Except where the flight time exceeds 10 hours, all international air travel is to be economy class. (The Board recognises the Principal's international travel over 4 hours may be Business Class travel due to health related concerns).
11. Business class travel may be approved, where the Board considers it appropriate, for travel more than 10 continuous hours in duration.
12. If a staff member has a travel time without a stopover in excess of 20 hours, a rest period of 24 hours before commencing work is permitted and encouraged.
13. The Board recognise that they may grant the Principal a recovery time after travelling overseas before returning to school. This would be expected to be a minimum of 2 days and the Principal should be urged to take this time.
14. The Board recognise that when marketing the school overseas for International students that the staff member may need to work during a NZ holiday or weekends. Time in lieu would be given in this case.
15. Staff should opt for good but not superior accommodation, and must be prepared to justify exceptions to this rule to the board e.g. conference facilities available, internet access, availability of smoke free rooms, proximity to where business will be transacted, staying in the same facilities as the travel marketing group. (The Board recognises that the accommodation should meet the staff members needs regarding health and safety, especially in accommodation in some overseas countries).
16. 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.
17. 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.
18. Use of private vehicles is to be approved on a one-up basis and reimbursement will be at the rate specified by the Inland Revenue Department and paid through Novopay.
19. 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.
20. 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".
21. For travel within New Zealand, actual and reasonable expenses are those incurred above the normal day-to-day costs.
22. All personal expenditure is to be met by the staff member. Examples of this are mini bar purchases, in-house movies, and private phone call charges. These are to be paid separately by the travelling staff member.
23. All receipts must be retained and attached to the travel claim. The claim is to be authorised on a one-up basis.
24. 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.
25. 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.

26. Airpoints are gained by the traveller, and as such are accrued by the traveller. In most cases these expire after a year. Airpoints accrued from official travel are to be used for subsequent travel on behalf of the school (or personal travel when they are about to expire). However there may be no certainty of being able to use the airpoints to upgrade so this and the costs of cancellation must also be taken into consideration.
27. Staff must travel by the most direct route unless scheduling dictates otherwise.
28. 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.
29. The Board will meet any conditions on travel and reimbursements as cited in the Collective contracts.
30. 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.
31. This policy will be placed on the school web site where it will be available for staff and the community to access.

Approved	20/03/2018	Board of Trustees Meeting
Signature of Chairperson		
Reviewed ---	25/05/2021	-----