**SAMPLE TRAVEL POLICY**

**STATEMENT OF PURPOSE**

This document establishes policies governing travel on ……………….. school business and the reimbursement of travel and entertainment expenses incurred during the conduct of school business.

It is .........................’s policy to reimburse employees for ordinary, necessary and reasonable travel expenses that are directly connected with or pertaining to the transaction of school business.

Employees are expected to exercise prudent business judgment regarding expenses covered by this policy. When submitting expense reports to claim reimbursement, employees are expected neither to gain nor to lose financially.

Reimbursement for expenses that are not in compliance with the policy requires the written approval of the Business Unit Manager.

All travel is to be booked through our preferred travel manager, .......................... Airfares, Accommodation and Car Hire are to be charged to .........................’s Diners Card through .......................... Incidental costs are to be paid by the employee and reimbursed through the Expense Claim.

This policy covers all domestic and international travel undertaken by employees and board members of ..........................

**RESPONSIBILITIES AND ENFORCEMENT**

......................... employees who incur travel and entertainment expenses are responsible for complying with this policy. Employees submitting expenses that are not in compliance with this policy risk delay, partial or non- reimbursement.

Supervisory levels with pre-established approval authority are responsible for ensuring that all policies detailed herein have been adhered to, before they approve employee expense reports. Any deviations must be explained on the expense report.

The Finance department will not process payment for expense reimbursements that are not in compliance with this .........................’s corporate travel policy.

**TRAVEL ARRANGEMENTS**

All .........................’s travel must be covered by a Travel Order (see Appendix 1), which must state:

* the reason for travel
* the duration of the journey
* method and class of travel and
* cost centre to be charged

The Travel Order should be approved by the relevant Manager and must be completed prior to the travel being undertaken. The Travel Order should be submitted in the attached format, or alternatively may be submitted by email. Only when approval is obtained may bookings be made.

Travel arrangements are to be made through the School Travel Coordinators

1.

2.

3.

4.

All itinerary changes and cancellations must be made through .........................’s Travel Manager, ..........................

**AIR TRAVEL**

**Domestic**

Domestic airline tickets will be issued as E-tickets wherever possible. Photo identification (e.g. driver’s licence) will be required to collect E-tickets at the airport check-in desk.

.........................’s preferred Travel Manager, ......................... will provide a detailed travel itinerary and confirmation of bookings as appropriate. ......................... will ensure airline tickets are delivered prior to departure, or are available at airports for collection where E-tickets are not available.

Qantas and Virgin Blue should be used based on which airline is offering **the best fare on the day** for the flight time required. All employees of ......................... will travel in economy class.

Due to fluctuating airfare, it is in the School’s best interest to book flights at least 1 week in advance in order to obtain discounted fares.

**Internationa**l

When booking international fares, the best option fitting to schedule and fare should be taken. Your travel manager will provide you with 3 options for your consideration.

**ACCOMMODATION**

The school will negotiate discounted rates with certain hotels or motels. ......................... standard is moderately priced business class hotels and motels. The travel coordinator will make appropriate accommodation arrangements consistent with .........................’s accommodation policy. Any deviation from this policy requires the written approval of the Business Unit Manager or CEO.

**Accommodation Expenses**

In general, only room charges are reimbursable. Other charges such as telephone, laundry, etc. will be assessed on a case by case basis. Where reasonable, such charges will be reimbursed after approval by the Business Unit Manager

**Payment and Documentation**

Hotels charges are to be billed to .........................’s Diners credit card and reported on expense report forms. The hotel folio bill is required documentation for reimbursement for hotel expenses. Employees submitting expenses that are not in compliance with this policy risk delay or partial / non-reimbursement.

**TRANSPORTATION**

**Car Rentals**

Car rental must be included in the travel requests and approved prior to travel. Cars should be rented by employees only when other means of transportation are unavailable, more costly or impractical. The use of a rented car must be justified as a business need and not as a matter of personal convenience.

**Car Rental Policy**

The school will negotiate with Car Hire companies on your behalf when required.

All rentals must be for intermediate size cars or smaller, unless three or more people are travelling together. Any departure from the policy requires the written approval of the Business Unit Manager or the CEO.

**Car Rental Insurance**

For car rentals, optional insurance coverage is not required and is not reimbursable, as the school has pre-arranged such coverage.

**Refuelling**

Employees are encouraged to refuel rental cars before returning them to the supplier. This practice can save as much as 50 percent of the fuel cost.

**Payment & Documentation**

Car rental cost should be charged to .........................’s Diners Card and documented on expense reports with the original car rental receipt.

**Taxis and Other Local Transportation**

The cost of taxis to and from places of business, hotels or airports in the connection with business activities is reimbursable. Use of taxis is authorised only when more economical services (e.g. hotel vans, shuttles, own automobile) are not available. Employees are encouraged to use public transportation whenever feasible. Taxis should not be used as a means of travel to and from an airport at the beginning and end of a business trip unless the cost of taxi trave is cheaper than airport parking costs. Receipts are required for all transportation expenses of $10.00 or greater.

**MEALS & ENTERTAINMENT**

Business meal expenses are those incurred by employees on an away from home base business trip. Travellers are expected to keep their expenses to a minimum. Whilst ......................... will meet all reasonable expenses incurred whilst travelling, it will not accept charges which cannot be satisfactorily justified

Entertainment expenses include cost incurred with clients, prospects, suppliers or associates at restaurants, theatre and sporting events, when a business discussion takes place before, during, or immediately after the event. Entertainment expenses must be approved in advance by the manager of the employee’s profit centre.

**Payment & Documentation**

All expenses must be supported by a tax invoice / receipt attached to the expense report. For GST reasons, a credit card receipt is not sufficient grounds for reimbursement and should be accompanied by a tax invoice.

A detailed expense account must be furnished for approval by the appropriate supervisor prior to reimbursement.

**OTHER REQUIREMENTS**

**Insurance**

Employees of ......................... are covered under .........................’s school insurance, therefore additional insurance is not required.

**Spouse Travel**

Travel expenses for a spouse are not reimbursable as a business expense unless it can be shown that the spouse’s presence was both essential and directly related to the effective accomplishment of .........................’s business. In these limited instances, the employee must obtain written approval in advance from the Chief Executive Officer. Travel expenses for a spouse are to be included on the employee’s expense report.

**Passports and Visas**

It is the responsibility of all ......................... personnel who are called upon to make overseas trips to ensure that passports and visas are up-to-date.

**Medical – Injections, Health Cards etc.**

It is the responsibility of all ......................... personnel who are called upon to make overseas trips to ensure that injections and health department requirements are complied overseas trips to ensure that injections and health department requirements are complied with.

**Travel Advice and Safe Travel**

It is the responsibility of the employee making any overseas trips to ensure that up to date travel advice and safety warnings are adhered to. Information should be obtained from ......................... prior to the commencement of any travel.

**Unused tickets**

Employees are responsible for ensuring that unused tickets are returned to the .........................’s school travel manager, ........................., for the issuing of credits.

**Items under $10.00**

Individual items of less than $10 not supported by receipts are not subject to FBT up to a total of $200.00 per person per annum. Receipts are to be obtained wherever possible for items below $10.00.

**Appendix 1: Travel Authorisation Request**

Office Use

Travel No.

### APPROVAL LEVELS: DOMESTIC: REGIONAL DIRECTOR or HEAD OFFICE DIRECTOR

**INTERNATIONAL:** EXECUTIVE DIRECTOR

EMPLOYEE TRAVELLING

**NAME: REGION/ HEAD OFFICE UNIT:**

**Region / Centre / Cost Centre: / /   
 (for accounts coding)**

###### BUSINESS PURPOSE OF TRIP: (Include key contacts, activities and events)

**PRIVATE TRAVEL COMPONENT**: (Exclude weekends between departure and return dates)

**DATE (FROM /TO)** **LOCATION /DETAILS**

**TRAVEL PLAN:** (Provide separate entry for each leg of journey)

**LOCATION**

**CARRIER** **DATE TIME** **CLASS** **DEPARTURE**  **DESTINATION**

**ACCOMMODATION:**

**LOCATION** **HOTEL/LODGINGS CHECK-IN** **CHECK-OUT**

**CAR RENTAL REQUIREMENTS:**

**PICK-UP . RETURN .**

**DATE LOCATION DATE LOCATION VEHICLE STANDARD**

**ESTIMATED COST OF TRIP:**

**REQUESTED BY MANAGER: ENDORSED BY DIRECTOR:**

**Date:**

**Date:**

Signature Signature

**Detailed booking procedures**

**and contact details.**

**CONTACT DETAILS**

......................... is the nominated Travel Manager for ..........................

Listed below are the contact details for all bookings.

### Phone: …………………

### Fax: …………………

### Toll Free: …………………

## TRAVEL BOOKING PROCEDURE – Regular Travel

1. A Legitimate reason for travel has been established
2. Complete the Travel Request Authorisation (TRA) noting in full all requests for flights, accommodation and car hire.
3. Have the TRA authorised from your appropriate Manager.
4. Have your travel coordinator contact .........................’s nominated Travel Manager, ......................... to make your booking. A purchase order / booking number will be issued against the booking and will be needed for any reimbursement of costs. Your consultant will have all your individual details on file and will be fully informed on .........................’s Travel Policy.

Your dedicated travel consultants are:

\*\* If you are a new traveller and ......................... does not have your individual profile on record, a form will need to be completed prior to making any bookings. \*\*

1. Fax or email a copy of your TRA to ......................... at the time of booking to confirm your request with your consultant.
2. Your consultant will complete your booking request and upon confirmation from all suppliers will email you your itinerary for approval.
3. Advise your consultant on final approval of the itinerary supplied or any changes that need to be made.
4. Your consultant will issue appropriate documentation and send the final itinerary**.**