



Travel Policy

1. Purpose, Scope and Responsibilities

1.1 Policy Purpose

The purpose of this policy, which is available as public information on Unitec's website, is to:

- Set the principles and procedures that apply when planning, approving, organising or undertaking travel associated with Unitec business
- Ensure prudent financial management and accountability relevant to expenditure on Unitec travel
- Ensure Unitec fulfils its obligations with respect to:
 - safety
 - duty of care for its staff members and others undertaking travel on Unitec business
 - Unitec's commitment to sustainability and One Planet principles
- Ensure Unitec, as a public entity, meets the required standards of the Auditor General

1.2 Policy Application and Scope

This policy (and its associated procedures) applies to all Unitec staff members, students, and contractors when planning, approving, organising or undertaking travel for Unitec-related business or study.

2. Policy Statement(s) and Strategy

2.1 Sensitive expenditure

The Office of the Auditor General sets out guidelines for controlling sensitive expenditure for public entities; Unitec recognises that expenditure related to travel and accommodation poses a risk with respect to sensitive expenditure and has an expectation that the guidelines set out by the Office of the Auditor General are followed wherever possible.

2.2 Prudent judgement

Unitec expenditure on travel is subject to the standards of probity and financial prudence that are expected of any New Zealand public entity and must be able to withstand public and parliamentary scrutiny. All staff members, including travellers and approvers, are expected to exercise prudent judgment regarding business travel and travel expenses to ensure the expenditure is reasonable, justifiable and cost effective for Unitec and able to withstand public scrutiny.

- i) Travellers and managers approving travel are expected to consider travellers' risk and safety, and make appropriate decisions regarding travel. Managers must refer to the MFAT safe travel web site and manage risks accordingly.
- ii) Unitec staff members should not travel to or through areas classified as 'Do Not Travel' on the MFAT travel advisory website. If travel to or through such areas cannot be avoided, and/or where it is decided that the trip is still required, travel must be pre-approved in

writing by the Chief Executive and a full risk assessment must be undertaken. Unitec's corporate travel insurance does not provide insurance cover for areas that have this classification at the start of the trip and alternative insurance needs to be organised.

- iii) All travel (totalling more than \$100) undertaken on behalf of Unitec including rental car hire and/or private car usage (e.g. mileage claims), any associated accommodation and expenses, must be necessary, approved and documented.
- iv) As a guide, meal allowances are \$20 for breakfast, \$15 for lunch, \$35 for dinner and \$10 for incidentals per day. All amounts are GST inclusive. Any alcohol consumption during meals should be paid for separately at the cost of the traveller.
- v) Approved travel and associated costs whether paid directly or reimbursed by Unitec are subject to the provisions of this Policy.

2.3 Approval and Documentary Evidence

- i) The approval process must be completed in accordance with this Policy before any booking is made or travel is undertaken.
- ii) Travel and associated expenses must be approved by the staff member's manager who holds the delegation and budget to approve business related travel as set out in the DFA schedule section for Travel Approval. When approving the travel and associated costs, the manager will ensure the travel is essential to meet departmental and/or Unitec's business objectives.
- iii) Members of the Executive Leadership Team are exempt from the requirement to complete a travel application approval form for necessary and prudent domestic business travel. Instead email evidence of 'one-up' approval is required and this is to be filed on the Executive H: drive Travel folder.
- iv) Where students are undertaking travel in relation to their study the approval to travel, itinerary, costs, all travel coordination and risk assessment and plan must be approved by the Executive Dean or Executive Director prior to any travel arrangements being made.
- v) All travel is to be documented following the Application to Travel process as specified in the Travel Procedures and Guidelines. For some travel, additional approval will be required as follows:
 - All international travel must be approved by the Chief Executive
 - All proposed travel for marketing and strategic alliance purposes, needs to be preapproved by the Executive Director - Partnership and Student Recruitment.
 - All proposed travel for research purposes and associated conferences must comply with any specific criteria established by the Unitec Research Committee and be preapproved by the Director Research and Enterprise Tuapapa Rangahau.
 - All travel (totalling more than \$100) undertaken on behalf of Unitec including rental car hire and/or private car usage (e.g. mileage claims), any associated accommodation and expenses, must be necessary, approved and documented.
- vi) When a staff member wishes to combine personal/private travel with business travel, they must declare this when making the Application to Travel. The approver must be satisfied that Unitec business is the main purpose of the travel and that there will be no additional cost to Unitec. All costs associated with the private component of the travel are the responsibility of the traveller.
- vii) Once approved the approved amounts become the travel budget. Travellers are expected to ensure all costs associated with the trip stay within this budget.

2.4 Accountability

The approving Manager who holds the necessary financial delegation will be accountable for:

- i) the business justification for the travel
- ii) the financial commitment associated with the travel
- iii) approval of any leave
- iv) the risk assessment
- v) consideration of the travel to our One planet sustainability principals

2.5 Corporate Travel Management Company

Unitec has a contracted Travel Management Company (TMC).

- All travel, accommodation, associated travel arrangements and vehicle hire must be booked via the Travel Management Company to allow the management of Health and Safety requirements, concise reporting and ease of administration.

2.6 Sustainable travel

Unitec has adopted the principles of One Planet living.

One Planet living promotes sustainable transport including reviewing the need for travel, encouraging low and zero carbon modes of transport to reduce emissions.

Travellers and managers approving travel are expected to consider the imperative of in-person attendance at venues off-site and where ever reasonably possible utilise alternatives such as tele- conferences or webinars.

Unitec will:

- Highlight awareness of the One Planet philosophy and the need to have sustainable travel
- Recommend our Travel Management Coordinators and/or travellers select travel options that provide the best balance between cost, climate footprint and the health and work/life balance of the traveller/s.
- Explore mechanisms for Carbon Offset where travel is undertaken.

2.7 Responsibilities

Role	Responsibilities
Chief Executive	<ul style="list-style-type: none"> May grant an exemption to Unitec's policy on travel to areas identified by MFAT as 'Do Not Travel'. Prior to international travel, approve within delegation budgeted and non-budgeted international travel and associated costs, in accordance with Unitec priorities associated with course / department learning, research, or business objectives.
Executive Dean or Executive Director	<ul style="list-style-type: none"> Prior to domestic travel, approve within delegation budgeted and non-budgeted domestic travel and associated costs, in accordance with Unitec priorities associated with course / department learning, research, or business objectives. Prior to travel, approve student course related travel including justification, itinerary, management, risk assessment and risk management plan and costs to Unitec. Consider and manage as appropriate One Planet obligations
Managers	<ul style="list-style-type: none"> Prior to travel, approve within delegation budgeted and non-budgeted travel and associated costs, in accordance with Unitec priorities associated with course / department learning, research, or business objectives. Review the travel itinerary and risk exposure, consider staff and other related travellers safety and make appropriate decisions and recommendations regarding travel. Note: Travel to destinations classified as 'Do Not Travel' on the MFAT travel advisory website and all international travel must be approved by Chief Executive. Ensure travel requests comply with the travel and associated Unitec policies. Within delegation, approve business related travel expenses from the departmental travel budget in accordance with the relevant policy. Where a travel budget does not exist refer to the associated Executive Dean or Executive Director. Approve associated leave. Consider appropriate sustainable options associated with travel As required report on departmental travel.
Traveller	<ul style="list-style-type: none"> Comply with this and all other Unitec Policies. Report to Manager pre-existing conditions that may affect ability to travel. Apply and receive pre-travel approval for business related travel. Plan travel and complete all travel arrangements in a timely and sustainable manner. Take appropriate and reasonable steps to safe guard themselves (refer to MFAT safe travel website). Check that personal vaccinations are appropriate and up to date for the destinations you are travelling to. Utilise the Unitec Travel coordinator and Travel Management Company (TMC) for all travel and associated bookings. Conduct themselves at all times in a manner suitable to represent Unitec. Ensure all expenses charged to Unitec are reasonable, adequately documented and related to the business conducted. As required, provide a written report on the outcome of the travel

Unitec Travel Coordinator	<ul style="list-style-type: none"> Provides supporting information necessary for the travel application Manages bookings and ensures bookings are made in accordance with Unitec policy and the approvals given Liaises with Unitec's Travel Management Company and organise the bookings (and insurance if special insurance is required – refer 2.2(ii) and 2.3) at the earliest practical time Check the MFAT safe travel website for risk advisories affecting the travel Deposit a scan of all approved travel applications to the designated shared folder for record keeping purposes
Finance Department	<ul style="list-style-type: none"> Appoint and support all Unitec Travel Coordinators Maintain a central electronic depository for all approved Applications to Travel
Procurement Officer	<ul style="list-style-type: none"> Manages and coordinates the selection and appointment of the Travel Management Company Manages and monitors the performance of the Travel Management Company

3. Appendices

3.1 Definitions

Term	Definition
AOG	All of Government
Application to Travel	The Unitec Application to Travel form current at the time of the application
Domestic	Travel within New Zealand by either road or air
Emergency Travel Arrangements	Travel and associated arrangements as a result of a situation where there is risk to personal safety, a dangerous situation or extraordinary circumstances, which puts people and property at risk and necessitates
Do Not Travel	Any location classified as Do Not Travel on the Safe Travel website of the Ministry of Foreign Affairs and Trade
International Travel	All travel with destinations or stopovers outside of New Zealand.
MFAT	Ministry of Foreign Affairs and Trade
One Planet	An encompassing sustainability practice. See http://www.bioregional.com/
Personal Expense	Travellers expense that is not directly relevant to performing work for or on behalf of Unitec
Staff Member	Any employee or contractor travelling on Unitec Business
Sustainable Travel	Travel where the associated environmental and economic impact is minimised without negatively affecting the ability of the organisation to deliver its mandate
Trans-Tasman travel	All international travel where all destinations outside New Zealand are in Australia
Traveller	Person traveling on behalf of Unitec Business or Study
Travel Management Company (TMC)	The organisation contracted by Unitec to organise all Unitec travel
Unitec	Unitec Institute of Technology including all its subsidiaries

4. Reference Documents

4.1 Compliance with legislation

This policy must comply with:

- Public Audit Act 2001 (See Controlling Sensitive Expenditure Guidelines for Public Entities ISBN 0- 478-18171-X)
 - Health and Safety at Work Act 2015.
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4.2 Compliance with Unitec documents

4.2.1 Corporate policies

Unitec personnel are expected to perform their role in accordance with Unitec's corporate policies as well as with standards of behaviour specified and/or implied by the following:

- Unitec Code of Conduct
- Unitec Delegations policy
- Unitec Health and Safety Policy
- Unitec Insurance Policy
- Unitec P Card Policy
- Unitec Sensitive Expenditure Policy
- Unitec Expense Claim Policy
- Compliance with international agreements
- Unitec Travel Guidelines

4.2.2 Related forms

- Travel Application Form
- Business Travel Report Template

5. Document Management and Control Details

5.1 Document Details

Version:	1.7	Issue Date this Version:	19 November 2019
This Version Approved by:	Commissioner	Date of Approval:	November 2019
Document Owner:	Procurement Officer	Document Sponsor:	Executive Director - Finance
Date of Next Review:	November 2022	Consultation Scope:	<p>The following have been consulted for this policy review:</p> <ul style="list-style-type: none"> • TMC • ELT • Travel Bookers • Health and Safety • Sustainability
Date first version issued:	21 December 2015	Original Approval Body:	Council

5.2 Amendment History

Version	Issue Date	Reason for Revision	Approved by
	14/10/2015	Update policy to respond to full review	
	21/12/2015	Add sustainability policy and remove procedures	Chief Financial Officer
Draft 2	03/04/2019	Change various role titles and responsibilities to take account of Unitec's new structure	
1.7	October 2019	<ul style="list-style-type: none"> • Update to reflect approval process for ELT members undertaking domestic travel and strengthen rules in relation to private car usage • Update to provide clarity around meal costs, differences between cash advances and per diem 	