

# KAIKORAI VALLEY COLLEGE

## TRAVEL PROCEDURE



### INTRODUCTION

The Board agrees that it has a responsibility to ensure that travel expenditure incurred by the School is clearly linked to the business of the School. The Board also agrees that the fundamental principles below offer guidelines under which this procedure shall be administered.

### Principles

- Travel expenditure may only be claimed for travel that is on the Board's business, and clearly benefits the school, when considered against the cost;
- Expenses are reimbursed on an actual and reasonable basis; and
- Staff required to travel on school business do not suffer any negative financial effect.

### GUIDELINES

1. Any school travel to be undertaken, where it is expected a claim will be made, must be first approved by the Board or their delegated authority, e.g. BOT sub-committee, Principal.
2. All booking for domestic and international travel is to be conducted through the School's normal purchase procedures. This includes the booking of accommodation, flights and rental cars.
3. The Principal and International Director may use the school credit cards to book travel/ accommodation for the purposes of their particular roles.
4. Those travelling on **international business** will receive a daily allowance to cover incidental expenses e.g. meals, minor expenses, taxi's, etc. Unexpected expenses e.g. taking a client (agent) out for a meal, additional travel bookings, will be reimbursed on an actual and reasonable basis

#### *Travel within New Zealand*

1. The justification for travel within New Zealand must be documented. It is to be transparent and must relate to a school need e.g. Professional development, sporting trips.
2. All domestic air travel should seek the cheapest available flights.

#### *International Travel*

1. All international travel is authorised by the Board's International sub-committee or its delegate (Principal) before it is booked.
2. A proposal schedule is presented detailing the purpose of the trip, the expected benefit, and an estimate of the costs of the trip.
3. At the end of the trip overseas, the traveller provides a report detailing of 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.
4. If a staff member has a travel time without a stopover in excess of 20 hours, it is recommended that a rest period of 24 hours before commencing work is permitted. The Board understands that this will not always be possible, however, leaves this up to the discretion of the individual.

5. All international travel will be Economy Class unless previously approved by the Board or its delegate (Principal).

#### *Accommodation*

1. Staff should opt for comfortable but not superior accommodation. 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*

1. 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.
2. Use of private vehicles is to be approved on a one-up basis and reimbursement will be at the rate specified by the Collective Agreements.
3. If taxis/ shuttles are to be used, petty cash will be provided ( staff member to sign for any petty cash received ), and a receipt must be obtained

#### *Reimbursement of Expenses*

1. 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”.
2. For travel within New Zealand, actual and reasonable expenses are those incurred above the normal day to day costs.
3. All personal expenditure is to be met by the staff member. Examples of this could be mini bar purchases, in house movies, laundry and private phone call charges are to be paid separately by the travelling staff member. However, in the event of travel for the recruitment of international students some exceptions will be made, e.g. laundry, phone.
4. All receipts must be retained and attached to the travel claim. The claim is to be authorised on a one-up basis.
5. 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.
6. 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*

1. Staff must travel by the most direct route unless scheduling dictates otherwise.
2. 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.

Date of Confirmation by the Board of Trustees	8 August 2012
Reviewed	23 April 2013
Reviewed	22 April 2016

Reviewed

24 February 2020