



Travel Policy

Document number: PO2019-006 Version 3

Approval

Policy owner	Executive Director, Corporate Services		
Approved by	Executive Leadership Team State Council		
Date approved	14 August 2019 17 April 2021	Review date	14 August 2021

Purpose

1. The purpose of this policy is to establish guidelines for business related travel for St Vincent de Paul Society NSW (Society) employees, members, and volunteers (Personnel).
2. This Policy sets out when Society Personnel are entitled to travel and accommodation expenses.
3. The Procedures have been developed to ensure that Personnel are accountable for correct and efficient use of travel budgets and that administrative arrangements are efficient and cost effective.

Scope

4. This policy applies to all Society Personnel (employees, volunteers, and members, contractors and consultants) travelling on official Society business with the approval of the Society.
5. This Policy and Procedures cover: seeking approval to travel; booking travel and accommodation; limitations on travel expenses; use of own vehicle; taxis and ride platforms (for example Uber); train travel; hiring vehicles; and how to claim travel expenses.
6. This policy also covers Society employees who routinely use their own cars for outreach purposes.
7. This policy does not cover the use of personal vehicles for member or volunteer activities (for example members or volunteers making home visits to community members).

Related policies and procedures

8. Related policies and procedures include:
 - Delegations of Authority Policy
 - Credit Card Policy
 - National Policy on Meeting Expenses (applies to attendance at National Council meetings)

Policy principles

9. While recognising the value of face-to-face meetings, the Society is committed to an environmentally friendly and efficient travel policy. The Society encourages all Personnel to consider whether or not it is necessary for travel to occur (for example is it possible to hold meetings via teleconference or Skype, Teams and/or Zoom) and whether there are opportunities to coordinate travel arrangements to minimise unnecessary travel.
10. The Society has the highest regard for the well-being and safety of all Personnel and will only require Personnel to travel when it is safe to do so, having reasonable regard to available information.
11. Travel expenses will generally be met by the Directorate/Central Council of the Personnel undertaking the travel. In exceptional circumstances, and with pre-approval, another Directorate/Central Council, which is hosting a meeting, may meet associated travel costs.

12. The Society will fund travel of Society Personnel who need to travel for genuine business reasons and where prior approval has been sought. Society employees who use their personal cars routinely to provide outreach services should preference using a pool car and should seek approval every time they use their cars.
13. Travel should be arranged using the Society's preferred supplier/s and following the Travel Procedure annexed at Appendix 2. No deviation from this should be undertaken without prior approval from the relevant Executive Director, Chief Financial Officer, Regional Director, or Director.
14. Personnel are expected to plan and undertake travel to keep costs down and unavoidable delays to a minimum. Accordingly, all travel must be booked at the Lowest Logical Fare at the time of booking.

Roles and responsibilities

15. The Executive Director, Corporate Services is responsible for maintaining the currency of this policy.
16. Executive Directors, Chief Financial Officer, Directors and Regional Directors must:
 - determine their annual travel budgets during the organisational budgeting process (with final budgets approved by the Board/State Council)
 - actively monitor travel expenses to ensure that travel within their directorates is undertaken within allocated budgets.
17. Managers/Supervisors must:
 - determine whether travel is necessary and reasonable
 - approve travel arrangements within allocated budgets and in a timely manner
 - pre-authorise regional, interstate and international travel (in writing) – See **Attachment A: Travel Booking Request Form**
 - authorise Personnel use of own cars for routine outreach purposes
 - ensure that expenses reimbursed or paid for by the Society are compliant with this Policy and approve using relevant completed forms
 - actively monitor travel arrangements and expenses, and manage patterns of travel taking into consideration Personnel health and wellbeing and budgets.
18. Society Personnel must:
 - familiarise themselves with this Policy
 - ensure their travel choices are the most efficient and cost effective for the Society
 - follow the Procedures annexed below at **Appendix 2**, including securing approval from their Manager/Supervisor, President, or other senior manager with delegation to approve travel prior to travelling
 - use the Travel Booking Request Form **Attachment A** to the Procedures at **Appendix 2**
 - obtain receipts for all travel expenses incurred and submit for reimbursement as soon as possible on completion of travel.

19. The Finance Department is responsible for the processing of business travel expense claims in a timely manner.

Review

20. This Policy and its implementation will be reviewed every two years, or on a needs basis as required to align with legislative or practice changes.

Further assistance

21. Society Personnel should speak with their manager regarding any questions about the implementation of this Policy.

22. Feedback regarding the implementation of this Policy can be provided to the Executive Director Corporate Services.

References

23. Legislation, regulations or other instruments relevant to this policy includes:

- *Work, Health and Safety Act 2011 (NSW).*

Approval and amendment history

Version	Approval authority	Date	Amendment summary
1 - Airfare and/or Accommodation Booking Policy & Procedures	State Council	May 2009	NA
Doc # PO2019-006	Executive Leadership Team	14 August 2019	This version has been updated and expanded to include policies and procedures for: seeking approval to travel; booking travel and accommodation; limitations on travel expenses; use of own vehicles, taxis and ride platforms; train travel; hiring of vehicles; and how to claim travel expenses.
Doc # PO2019-006 Version 2	Executive Director Corporate Services	27 July 2020	Updated ownership and responsibilities to align with organisational structure changes.
Doc # PO2019-006 Version 3	Executive Director Corporate Services State Council	19 March 2021 17 April 2021	Updated travel booking for State Council Members

Appendix 1: Definitions

24. Relevant definitions include:

Term	Definition
Lowest Logical Fare	The lowest logical airfare is the least expensive fare available at the time of reservation, on any airline within two hours of the preferred departure or arrival for domestic flights or within four hours for international flights.
Personnel	Any person (or group of people) engaged by the Society to assist in its works. This includes members, volunteers, employees, contractors and consultants.
Traveller	Any person travelling for work related purposes on behalf of the Society.

Appendix 2: Procedures

Authorisation for Travel

1. Prior to traveling, Society Personnel must seek approval from their Manager/Supervisor, President, or a senior manager with delegation to approve travel. This does not apply to Society Personnel who routinely use their personal vehicles to provide outreach services.
2. With the exception of the Chief Executive Officer and the State Council President, Society Personnel are not permitted to approve their own travel.
3. If travel falls outside the pre-approved travel budget for a Business Unit, approval to travel must be sought from the relevant Executive Director, Director or Regional Director.

Restrictions on travel

4. The Society reserves the right to withdraw approval, restrict, or cancel any or all business travel, having regard to health warnings, security warnings or other factors. Key considerations include:
 - travel to high-risk areas should be discouraged and avoided
 - the travel health and security advice provided by official sources
 - if the proposed travel to a high-risk area is considered essential and not able to be deferred, then a thorough risk analysis must be undertaken by both Personnel and their manager/supervisor, including steps to mitigate any risks
 - The Executive Director, Corporate Services must be informed of travel considered high risk.

Travel insurance for board directors, Trustees and employees

5. Board directors, Trustees and employees are covered by the Society's Travel Insurance Policy while on Society business; for relevant details please contact the Group Financial Controller.
6. Society board directors, Trustees and employees who hire a vehicle for Society business, are not required to pay additional insurance to the hire company to reduce the excess, as this is covered by the Society's Travel Insurance Policy.
7. In the event of a car accident, board directors, Trustees and employees are covered under the Society's Travel Insurance Policy, for a vehicle excess waiver. In such cases the Insurer will reimburse the Society or its directors or employees for the payable excess up the following:
 - \$5,000 for rental vehicle
 - \$2,000 for personal vehicle.
8. Board Directors, Trustees and employees travelling on business are covered under the NSW Work Health and Safety arrangements applicable at the time.

International travel

9. All international travel must be approved by the Chief Executive Officer or State Council President.
10. The standard class for all international travel is economy, except where there is a medical requirement for another class. Medical evidence for an alternative class must be current (minimum six months' validity) and attached to Travel Booking Request Form.
11. When travelling overseas for Society business, Personnel are covered under the Society's Travel Insurance Policy and do not require additional travel insurance.
12. It is recommended that all Personnel travelling overseas carry a travel insurance contact card, available from the Group Financial Controller.

Travel bookings

13. All travel arrangements must have prior approval from the Personnel's Manager/Supervisor, President, or other senior manager with delegation to approve travel.
14. Personnel must use the Travel Booking Request Form available on the Staff Portal and attached at **Attachment A** and must ensure that all elements of the form are completed including: budget cost codes, reason for travel, proposed travel arrangements and host's name and approval (if relevant).
15. Personnel must forward the completed form to their Manager/Supervisor, President, or other senior manager with delegation to approve travel, for approval and signature. Approval may also be provided in an email, which must be attached to the Travel Booking Request Form when submitting.
16. Where the travel is for an event hosted by another area within the Society (for example training, meeting, conference) and that part of the Society is responsible for the cost of the travel, the completed Travel Booking Request Forms must be returned to the host of the event for approval before it is submitted.
17. The completed Travel Booking Request Form must be submitted to travel@vinnies.org.au.
18. The Society's preferred travel supplier for all travel bookings is FCM Travel Solutions.
19. State Council members have standing approval for travel to attend State Council meetings, a booking request form is not required for this travel. The Executive Assistant making meeting arrangements will book travel for State Council meetings.
20. Personnel must check their travel booking confirmations/itineraries are correct as soon as they are received, and ensure that the preferred supplier is notified immediately if there are any errors.

Air travel

21. The standard class for all air travel is economy or discount fares, except where there is a medical requirement for another class. Medical evidence for alternative class must be current (minimum six months' validity) and attached to Travel Booking Request Form.

22. Approval for alternative class must be approved by the Chief Executive Officer or State Council President.
23. The guiding principle for flights bookings is the 'Lowest Logical Fare', which may mean that flights have conditions and restrictions attached. Employees must familiarise themselves with those conditions and fare types before departure.
24. Unless flexibility is required, flights should be booked at a cheaper restricted fare rate rather than flexible fares. Personnel should be aware, however, that when restricted fares are changed they often end up costing more than a flexible fare.
25. Membership of a frequent flyer program is not an acceptable reason to deviate from the lowest fare of the day policy.
26. Where possible, travel should be planned with as much advance notice as possible to ensure that the most efficient and economic travel arrangement can be made. Ideally, flights should be booked 21 days in advance.

Frequent Flyer Points and club membership

27. Frequent Flyer Points gained by Personnel in the course of business travel may be used for the individual's personal benefit and enjoyment.
28. Personnel travelling on Society business may use their personal Frequent Flyer Points to upgrade from economy with no prior approval required.
29. Personnel who travel regularly may be eligible for special negotiated club membership obtained through the Society's preferred travel supplier. Personnel should discuss with their Manager/Supervisor.
30. All frequent flyer and club membership fees are at the Personnel's expense.

Accommodation

31. When Personnel are required to travel for work purposes it is appropriate for them to stay overnight, when:
 - flight timetables do not allow for same day travel
 - travel would amount to more than three hours travel each way
 - two or more days of work in a row is required.
32. When selecting accommodation personal safety must be considered and preferred hotels booked when available.
33. Personnel are eligible for Society preferred, not-for-profit, or government accommodation rates. Personnel must select the best rate of the day, bearing in mind that some rates may include breakfast, and may therefore be the most cost effective option.
34. Where breakfast is included in the accommodation rate, it will not be reimbursed.
35. Hotel charges should be charged back to the Society directly. On checking out, Personnel will be provided with a statement and must confirm all charges are correct.

36. When hotel charge-back is not available, Personnel are expected to pay the hotel bill on checkout using their corporate credit card. If Personnel do not hold a corporate credit card, they should cover the costs and reimbursement may be claimed via the Expense Reimbursement Claim Form for Employees, Members and Volunteers available on the Staff Portal.

Extending time away beyond what is required for business

37. If Personnel are travelling at the beginning or end of the week and wish to extend their stay in the location over the weekend, they must provide evidence of the comparable fare for the day and time of travel if they were not extending their stay.
38. The extended time is at the Personnel's own cost and includes: any difference in airfare price (which must be reimbursed to the Society), accommodation, meal and incidentals.
39. The Society's insurance policy will not cover Personnel for the extended period for personal reasons.

Combining Annual Leave and Business Travel

40. Any requests to combine annual leave with business travel must be approved by the employee's Manager/Supervisor, President, or other senior manager with delegation to approve travel. Each request will be addressed individually, taking into account length of leave, destination and organisational requirements.

Family members travel

41. Family members who choose to accompany Personnel on a work related trip must do so at their own expense.
42. Any upgrade in accommodation is at the Personnel's own expense.

General Transport

43. Employees required to travel for business purposes must consider the most cost effective and efficient mode of transport. They must also consider whether it is possible to share transport if others are travelling to the same meeting, event or other activity.
44. Where available, public transport should be the first option for local transportation.
45. When employees use public transport for business purposes, they may be required to pay the cost and then seek reimbursement (for example when a prepaid option or work Opal Card is not available).
46. If employees are required to use their personal Opal Card they may claim reimbursement by providing a copy of their Opal Card statement.
47. Reimbursement may be claimed using the Expense Reimbursement Claim Form for Employees, Members and Volunteers at **Attachment B**.

Taxi/ride platforms

48. Taxis or ride platforms (for example Uber) may be used for local business travel purposes when:
- public transport is not available, or not a time-efficient option

- a Society pool vehicle is also not available
- Personnel transporting goods that are not reasonable to take on public transport such as goods of value or large and/or heavy goods
- several Personnel are travelling to the same place and a taxi/ride platform is a more efficient and economical option
- Personnel have received prior approval from their Manager/Supervisor, President, or senior manager with delegation to approve travel to go home via taxi/ride platform (for example when required to work late and/or for safety reasons)
- Personnel become sick and are unable to be taken home or unable to take public transport home, and have received approval from their Manager/Supervisor, President, or senior manager with delegation to approve travel.

49. Personnel using taxis/ride platform for business purposes should:

- pay with a corporate credit card or cab charge card if available
- obtain a cab charge voucher from the Finance Department (if they do not hold a corporate credit card or cab charge card) following written approval from their Manager/Supervisor, President, or senior manager with delegation to approve travel.

50. The Finance Department will only issue cab charge vouchers when written/email approval from a Manager/Supervisor, President, or senior manager with delegation to approve travel is provided.

51. If it is not possible to obtain a cab charge voucher prior to travel, reimbursement may be sought using the Expense Reimbursement Claim Form for Employees, Members and Volunteers.

52. Unused cab charge vouchers must be returned to Finance Department as soon as possible and must not be used for any purpose other than that which it was approved for. New travel requires new approval and new cab charge voucher.

Rental cars

53. When car travel is required and it is more cost effective and more efficient than taxi/ride platform, Personnel may book a rental car with prior approval of their Manager/Supervisor, President, or senior manager with delegation to approve travel.

54. The Society or its preferred travel agent will maintain a list of accredited suppliers of car hire.

55. The standard car hire should be a small to mid-sized at best fare of the day. The Society is eligible for not-for-profit or government rental car rates. Personnel must select the best rate of the day.

56. Drivers must have a current driver's license.

57. Personnel are responsible for refueling vehicles during travel and upon returning vehicles and will be reimbursed accordingly.

Use of own vehicle

58. Employees who have a car, or a vehicle allowance, as part of their employment arrangements are expected to use this vehicle or vehicle allowance for all work related local travel and are discouraged from using Society pool cars. Where it is not practical or cost-effective for these employees to use their Society or personal vehicle for travel, they can be reimbursed for local

taxi, ride platform, public transport travel. For example, where travel to the city is required and car parking fees would be greater than a taxi fare.

59. Use of personal vehicles is discouraged unless employees have a fleet car or vehicle allowance. When employees are required to use a vehicle, the first preference should be the use of a Society pool car.
60. Where the use of one's personal vehicle is unavoidable, Society employees will be reimbursed for mileage incurred – following the ATO mileage guidelines or as per relevant employment contract. Society employees must:
 - have pre-approval from their manager, unless they routinely use their cars for outreach purposes
 - record precise mileage travelled and
 - submit approved **Mileage Expense Claim Form** (available on the Staff Portal) to Payroll.
61. Mileage will not be covered for the regular commute between home and work. If an employee regularly works in several locations, mileage will not be covered for the regular commute to all work locations. Where volunteers use their own vehicle, outside of their normal outreach work or other activities, it must be pre-approved by a manager/supervisor and must comply with the Volunteer Reimbursement Policy.
62. In accordance with The Rule, members are expected to use their own vehicles for reasonable associated travel. Members may be reimbursed travel in their own vehicles when attending regional meetings, events or training outside of their regular area. Reimbursements must be approved by their President in line with their delegation of authority. Members seeking reimbursement for travel in their own vehicle must submit the Expense Reimbursement Claim Form for Employees, Members and Volunteers provided at Attachment B.
63. Society employees must not transport clients in their personal vehicles except in extenuating circumstances and when all other avenues have been pursued.

Travel expense reimbursement

64. Where possible, travel should be charged back to the Society or booked using a Society credit card.
65. Where approved travel cannot be paid for using a Society credit card, Personnel will be reimbursed.
66. Where travel is approved the Society will meet the costs associated with travel, including: accommodation, meals, incidentals (for example parking) and other approved items, up to the standard rates.
67. The Society will not cover any alcohol related expenses.
68. Standard rates: meals and incidentals will be reimbursed based on actual expenditure incurred. Meal expenditure should be reasonable and should not exceed the following rates:
 - Breakfast \$25
 - Lunch \$30
 - Dinner \$45

Expenditure in excess of these rates will not be covered.

69. Meal allowance can be claimed for day travel as well as overnight travel. If Personnel are required to leave home before 7am, they are entitled to breakfast allowance. Similarly, if Personnel return home after 8.30pm they are entitled to a dinner allowance.
70. Where meals are included in accommodation or work functions (for example conference or training) additional meal expenses will not be covered.
71. Tax invoice/receipts are required for all travel expenses and must be submitted and reconciled within 30 days of completion of travel.
72. Employees eligible for Time in Lieu (TIL) may claim travel time as TIL for intrastate or interstate travel This does not include overnight accommodation time and does not apply to travel that is to and from the employee's regular workplace. If working away from home, where the working day is within normal working hours, no TIL may be claimed. Travel time where possible should be factored into the normal working day and within the span of hours specified in the relevant industrial instrument.

Attachment A: Travel Booking Request Form

TRAVEL BOOKING REQUEST FORM

Instructions:

1. Person requesting travel to complete form, obtain approval from their Manager/Supervisor, President, or senior manager with delegation to approve travel, provide CORRECT cost centre code and email the booking form to: travel@vinnies.org.au - Email subject line to contain **traveller's name | date of booking**
2. For hosted meetings, Host is responsible for providing this form to participants.
3. Host to sign approval on the booking form and email to: travel@vinnies.org.au - Email subject line to contain **traveller's name | date of booking**
4. Confirmation will be sent to the traveller or Host (if host booking).

TRAVELLER'S DETAILS

Today's date:	Full Name/s to appear on ticket: Title:		
Member <input type="checkbox"/>	Volunteer <input type="checkbox"/>	Employee <input type="checkbox"/>	(Please tick one)
Mobile:	Email:		
Reason for travel: (name of meeting/ training etc)			
Travel sponsor: SSO <input type="checkbox"/>	Support Service <input type="checkbox"/>	Central Council <input type="checkbox"/>	

ACCOMMODATION REQUEST

Mercure Sydney: <input type="checkbox"/>		Sydney Boulevard: <input type="checkbox"/>		Other (Please specify): <input type="checkbox"/>	
Check in date:			Check out date:		
Total No. of nights:		Special requirements: Eg smoking, non-smoking, limited mobility shower access			

AIRFARE REQUEST - * Note: The airline booked will be based on lowest price *

Qantas Frequent Flyer No:		Virgin Velocity No:		Rex Flyer No:	
From:		To:			
Departure Date:		Departing Time: Flight No:		Carry-on baggage Checked baggage	
From:		To:			
Returning Date:		Returning Time: Flight No:		Carry-on baggage Checked baggage	

CAR HIRE REQUEST

Car hire required?		Yes: <input type="checkbox"/>	No: <input type="checkbox"/>
Pick up:		Drop off:	
Car size required:			

APPROVAL: An approval email is sufficient where unable to physically sign form

Signature of person requesting booking:	
Name & Signature of Manager/ Supervisor/President:	
Name & Signature of person hosting meeting (if the host is covering expenses):	
Cost Centre:	
Is this within Cost Centre's Budget? Yes: No:	
(ED/EO/SOM to approve business case for non- budgeted travel) Signature:	

