



TRAVEL EXPENDITURE PROCEDURES

Introduction

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 further agrees to ensure that staff required to travel on official school business do not suffer any negative financial effect. 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.

Objectives:

- to ensure the school obtains an acceptable benefit from the travel when considered against the cost.
- to ensure that staff travel expenses are reimbursed according to the guidelines outlined in the relevant employee Collective Contracts.
 - Primary Teachers' (including Deputy and Assistant Principals and other Unit Holders) Collective Agreement
 - Primary Principals' Collective Agreement
 - Support Staff in Schools Collective Agreement
- to ensure that expenses are reimbursed on an actual and reasonable basis.

Process for Making Travel Arrangements

- 1) All travel must relate to a school need and be authorised by the Principal. (or in the case of the Principal, the Board of Trustees)
- 2) All booking for international and domestic travel is to be conducted through the School's normal purchase procedures. This includes the booking of accommodation, flights and rental cars.

Travel within New Zealand

- 3) All domestic air travel is to be economy class or the lowest fare available.
- 4) Travelling Allowance – Any employee required to travel within New Zealand on official business for an absence of more than one day, including attendance at approved staff development courses, educational and sports events shall be paid a travelling allowance as outlined in the relevant collective agreement.

International Travel

- 5) All international travel should be authorised by the Board before it is commenced.
- 6) All international air travel is to be booked at economy class. Business class travel may be approved, where the Board considers appropriate, for travel more than 10 continuous hours in duration.
- 7) 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.

Accommodation

- 8) Staff should opt for good but not superior accommodation and must be prepared to justify exceptions to this rule to the Board.
- 9) 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

- 10) 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.
- 11) Use of private vehicles will be reimbursed be at the rate specified in Staff Employee Collective Agreements.
- 12) 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.

Reimbursement of Expenses

- 13) 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”. All receipts must be retained and submitted to the Executive Officer.
- 14) All personal expenditure is to be met by the staff member. Examples of this are mini bar purchases, in house movies, laundry and private phone call charges are to be paid separately by the travelling staff member.
- 15) The Principal or Executive Officer can authorise 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

- 16) Staff must travel by the most direct route unless scheduling dictates otherwise.
- 17) 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.