



TRAVEL POLICY

Opaheke School 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 has agreed on the fundamental principles of this Policy and has delegated responsibility for the implementation and monitoring of this Procedure to the Principal.

The Board requires the Principal, to implement and manage this Procedure. The Principal may, from time to time, further delegate some of their responsibilities, and all such delegations must be attached as appendices to this procedure.

This policy must be read in conjunction with other Board Policies, and the exercising of all authority and responsibilities conferred under this Procedure must be in accordance with the Schedule of Delegations and may not exceed an individual's established level of delegated authority.

Opaheke School agrees to ensure that:

- the travel expenditure is on the Board's business, and the School obtains an acceptable benefit from the travel when considered against the cost;
- expenses are reimbursed on an actual and reasonable basis; and
- staff that are required to travel on business do not suffer any negative financial effect.

GUIDELINES

Process for Making Travel Arrangements

Under no circumstances may any staff member approve their own travel other than the Principal. 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.

Once booked, staff may not downgrade or cash in air tickets to subsidize personal travel or to subsidise travel for non-Opaheke School individuals. In addition, changes may not be made to travel to subsidise another portion of travel – cost savings in one area may not be used to subsidise upgrades and / or other spend.

Travel within New Zealand

The justification for travel within New Zealand must be documented via professional learning travel agreement (procedure 1). It is to be transparent and must relate to a school need. Travel within New Zealand is to be authorised by the Principal. All domestic air travel is to be economy class.

International Travel

Prior to international travel being undertaken, the traveller must be given a copy of this policy and the professional learning travel agreement and are required to sign the agreement to signify that they have read and understood it.

The board should be notified of all international travel and the purpose and the expected benefit before it is commenced.



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At the end of the trip overseas, the traveller must prepare a trip report (this may be verbal) which details activities, which took place during the trip and the benefits, to the Board and the School of the trip.

All international air travel is to be economy class.

If a staff member has a travel time without a stopover in excess of 10 hours, a rest period of 24 hours before commencing work is permitted.

Travel Over A Weekend

A staff member who is required to attend professional learning over a weekend may negotiate with the Principal personal time on either Friday and / or Monday. The decision whether or not to grant this is at the discretion of the Principal.

Accommodation

Suitable and reasonable accommodation should be booked in consultation with the principal. 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.

Vehicles

Suitable and reasonable rental cars to be used when this is deemed appropriate and/or cost effective.

Use of private vehicles is to be approved by the principal and reimbursement will be at the rate specified by collective agreement

If taxis or other rideshare are used, then staff should pay for these out of their own pocket, obtain a receipt and seek reimbursement as part of an expense claim.

Reimbursement of Expenses

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”.

For travel within New Zealand, actual and reasonable expenses are those incurred above the normal day to day costs. For example, a staff member would normally incur personal expenditure for lunch on a daily basis and the cost of lunch when travelling should not be reimbursed unless the costs are greater than that normally incurred.

Generally the costs of meals (including non-alcoholic drinks) paid by the school should be in the mid-range both in respect of the eating establishment concerned and the menu. No purchases of alcohol will be reimbursed.

All personal expenditure is to be met by the staff member.

All receipts must be retained and attached to the travel claim. The claim is to be authorised by the Principal.



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Discretionary Travel Benefits

Due to the minimal benefits received, travel benefits, including airpoints and loyalty scheme rewards/points accrued from travel, are able to be utilised for personal use.

Staff must travel by the most direct route unless scheduling dictates otherwise. This may incur additional expenses able to be reimbursed by the school.

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.

Should a staff member receive any additional gifts or prizes during their period of travel, these will remain the property of Opaheke School.

Signature Section for International Travellers

I have read and understood this procedure and agree to abide by it.

Signed (Staff Member)

Signed:


Board of Trustees Chairperson

Date:

3/11/2020