

# Travel Policy



Melbourne Archdiocese Catholic Schools Ltd (MACS) is a company limited by guarantee that has been established by the Archbishop of the Catholic Archdiocese of Melbourne to assume the governance and operation of MACS schools.

## Purpose

The purpose of this policy is to outline the principles and processes that apply when an employee is undertaking work-related travel. It defines travel approvals and arrangements, as well as the procedures that are to be followed when arranging and preparing for work-related travel.

This policy aims to ensure that work-related travel has the benefit of improving learning outcomes for students, has a positive impact on employee professional learning, and maintains the health and safety of an employee while travelling. Work-related travel might be undertaken for training, conferences or other professional learning activities.

## Principles

When decisions are being made regarding work-related travel, travellers and approvers should give consideration to the following general principles:

- travel must have a clear benefit and positive outcome on student learning
- travel must only be undertaken when there is no secondary 'best alternative'
- expenditure should be guided by the principles of integrity, equity and transparency.

## Scope

This policy relates to all travel expenditure incurred by:

- school-based staff employed to work in a MACS school including principals, teaching staff and all other school-based staff
- MACS office employees.

The policy does not apply to contractors, volunteers or students engaged by or enrolled in a MACS school.

This policy does not apply to secondary school principals who undertake work-related travel as part of their entitlement to enrichment leave. Further information regarding enrichment leave can be found in the [Professional Enrichment Leave Guidelines](#).

## Definitions

**Approver** – delegated approver of requested travel.

**Domestic travel** – travel within Australia.

**International travel** – travel outside Australia.

**Interstate travel** – travel outside Victoria, but within Australia.

**Intrastate travel** – travel within Victoria.

**MACS office staff** – MACS employees employed at MACS offices.

**School-based staff** – MACS employees based in MACS schools.

**Traveller** – employee requesting approval to travel for work-related purposes.

**Work-related travel** – approved travel for work purposes.

### Application

This policy applies to both MACS office staff and MACS school-based staff; however, due to the variances in approvals and processes, each section of this policy will clearly distinguish, by the use of subheadings, the approvals and processes that apply to each group.

### General

#### MACS office staff

- 1.1 Egencia Australia is MACS' approved travel management provider. Staff are to note that all flights, accommodation and car hire used by MACS office staff can only be booked through Egencia Australia. An Egencia Australia quote may be obtained by an employee; however, an approved eRequisition is required prior to formally booking the travel and/or accommodation.
- 1.2 This policy does not apply to accommodation and travel paid by an employee or external party which is not claimed for reimbursement.
- 1.3 It is important to note that relevant managers or directors have the responsibility to accept and approve the terms and conditions of the staff member's travel arrangements before submitting eRequisitions for approval.
- 1.4 Staff should be aware that all travel arrangements made for MACS office staff are owned by MACS.

### Valid rationale for travel

#### MACS office staff and MACS school-based staff

- 2.1 All alternative avenues for meeting the objectives of domestic or international travel should be considered before travel is proposed (e.g. video calls, domestic professional learning, etc.). Where official international travel is requested by staff members who have been invited to attend or present papers at international seminars and conferences, it should be demonstrated and approved that there is a direct and high-priority benefit to MACS.

### Quotes for travel

#### MACS office staff and MACS school-based staff

- 3.1 When a staff member is assessing options available for travel, they must have regard to booking flights and accommodation at the best rate of the day or that which is reasonable and economical having regard to the nature of the trip, the extent of travel required and the amount of travel that is required to be undertaken as part of their normal duties. For example, it may be reasonable for staff to stay at a venue where a conference they are attending is taking place, if accommodation is available at this venue. In other circumstances, staff should stay in accommodation which is economical, practical and reasonable.
- 3.2 Staff should not base booking decisions on personal preferences, access to lounges or the accumulation of reward points, as this may influence impartial and transparent booking.

## Funding for travel

### MACS office staff and MACS school-based staff

- 4.1 In the event that travel is partially funded, travel documentation must clearly identify all funding sources and is subject to approval.
- 4.2 Official travel may only be approved where there is no conflict of interest or perception of improper influence. The approval process is to comply with this policy.

## Options when booking travel

### MACS office staff and MACS school-based staff

#### Flights

- 5.1 When booking flights for both domestic and international travel, travellers and approvers must have regard to the following principles:
  - all flights must be economy class unless otherwise approved in writing and in advance by the responsible approver
  - where there is a possibility that travel may be rescheduled or postponed, travellers should consider the cost variances in fixed and flexible fares
  - travellers must compare prices and routes across airlines
  - travellers must plan and book travel as early as possible in order to take advantage of the best possible fares.

#### Accommodation

- 5.2 When booking accommodation, travellers and approvers should have regard to the best rate of the day or that which is reasonable and economical having regard to the nature of the trip, the extent of travel required and the amount of travel that is required to be undertaken as part of their normal duties.

### Travel by motor vehicle/public transport

- 5.3 Where local public transport is a safe and economical means of travelling, consideration should be given to utilising the method of transport.
- 5.4 In the event that public transport is not available and a traveller is required to undertake travel by motor vehicle, travellers and approvers should have regard to booking a vehicle that is fit to meet the requirements of the travel that is required to be undertaken.

## Processes and approvals for booking travel

### MACS office staff

#### Domestic travel

- 6.1 All work-related domestic travel by MACS office staff is to be approved in advance and booked via Egencia Australia. This includes the approval of all expenditure on fares, insurance, accommodation, allowances, conferences and hospitality.
- 6.2 Domestic travel arrangement approvals are outlined within [MACS Office Delegations](#) as follows:

- directors – approval by the Executive Director
- all other staff – approval by their respective director for interstate travel and overnight stays including accommodation (excluding professional learning conferences and staff servicing schools).

Overnight stays within Victoria, including accommodation for staff servicing schools in other dioceses and outer-region schools (subject to location and within budget), are approved by the applicable manager.

6.3 The following supporting documentation must be provided in order for travel to be considered for approval:

- a [Request for Approval of Domestic Travel](#) form signed by the person travelling
- a completed and approved eRequisition
- an Egencia Australia proposed travel itinerary (quote) with flight details or the equivalent cost estimate for travel by alternative means.

6.4 Preparations for travel can be made; however, staff members are not to enter into binding arrangements until all required approvals have been granted. Tickets may be tentatively booked, but are not permitted to be purchased. Upon an email or telephone enquiry ([travel@airservices.com.au](mailto:travel@airservices.com.au) or 03 9686 2555), Egencia Australia will provide a proposed travel itinerary (quote) to be included with the [Request for Approval of Domestic Travel](#) form.

6.5 Travel relating to professional learning is not to be booked until the professional learning application has been approved by all relevant approvers.

6.6 Following the approval of the [Request for Approval of Domestic Travel](#) form by the appropriate director, the quotation and all relevant documents are to be attached to the eRequisition as supporting documentation (Egencia Australia quotation). An email notification is then forwarded to the Finance team to action.

6.7 With an approved eRequisition, the staff member's travel arrangements will be confirmed with Egencia Australia. Travel arrangements may only be confirmed and booked with Egencia Australia by approved executive assistants who are endorsed by the Chief Financial Officer.

#### International travel

6.8 All international travel by MACS office staff members is to be approved in advance by the Executive Director and booked through Egencia Australia. This includes approval of all expenditure on fares, accommodation, allowances, conferences and hospitality.

6.9 Staff members requesting approval for international travel are to complete a [Request for Approval of International Travel](#) form to be approved by the Executive Director at least 10 days prior to travel being undertaken. The form is to be signed by the person travelling and their director and should include the following supporting material:

- the itinerary of the person travelling
- an eRequisition, once Executive Director approval has been obtained, attaching the approved [Request for Approval of International Travel](#) form and an Egencia Australia proposed travel itinerary (quote) with flight details or equivalent cost estimate for travel by alternative means
- a breakdown of travel expenses illustrating the expected costs for airfares, insurance,

accommodation, registration/conference fees, meals, hospitality and incidental expenses.

- 6.10 A senior officer from the Finance team can provide advice on the conversion of foreign currency.
- 6.11 Preparations for travel can be made; however, staff should not enter into binding arrangements until all required approvals have been granted. Tickets may be tentatively booked, but are not permitted to be purchased. Upon an email or telephone enquiry ([travel@airservices.com.au](mailto:travel@airservices.com.au) or 03 9686 2555), Egencia Australia will provide a proposed travel itinerary (quote) to be included with the [Request for Approval of International Travel](#) form.
- 6.12 Travel relating to professional learning is not to be booked until the professional learning application has been approved by all relevant approvers.
- 6.13 Travel arrangements may only be confirmed and booked with Egencia Australia by approved executive assistants who are endorsed by the Chief Financial Officer.
- 6.14 The duration of overseas visits should be kept to the minimum required to adequately complete the aims of the visit.
- 6.15 Requests to add private travel onto international travel require the Executive Director's approval in writing and may only be approved if the extension does not create the impression that official travel is being used to subsidise private travel arrangements.
- 6.16 MACS is required by law to comply with fringe benefits tax (FBT) requirements that are administered by the Australian Taxation Office (ATO).
- 6.17 Leave taken may require the staff member to contribute to flight costs in order to avoid the imposition of FBT. The staff member's contribution will usually be proportionate to the number of leave days taken as part of the trip and will be determined by the Human Resources team.
- 6.18 The length of leave taken is to be in reasonable proportion to the duration of the official travel. As a general guide, up to two days of leave may be taken for every seven days of official travel.
- 6.19 Leave or an extension of private travel taken while undertaking work-related travel is not to incur or result in any additional costs to MACS.

#### Travel with partners/family

- 6.20 Staff may travel with their partners/family provided that it does not incur any costs at the expense of MACS, and does not interfere with the business requirements of the travel.

#### MACS school-based staff

##### Domestic travel

- 7.1 In the first instance, a school-based staff member who wishes to engage in work-related domestic travel should discuss their wishes with their principal or, in the case of a principal, their regional general manager (RGM). Such discussions should address why the school-based staff member believes the travel is necessary, and what potential benefits it may have towards student learning and professional development.
- 7.2 Following the discussions referred to in 7.1, all work-related domestic travel by school-based staff is required to be approved in advance by the principal or, in the case of a principal, their RGM. This includes the approval of all expenditure on fares, insurance, accommodation, allowances, conferences and hospitality.

- 7.3 The following supporting documentation must be provided in order for travel to be considered for approval:
- a [Request for Approval of Domestic Travel](#) form signed by the person travelling and their principal
  - a proposed travel itinerary (quote) with the details of all expected costs associated with the travel, including explanations as to why the best rate of the day was not chosen for a particular fare or accommodation if applicable. School-based staff should include at least two quotes for each expected cost to be incurred where this is foreseeable.
- 7.4 When applying for approval of domestic travel, school-based staff must provide as much notice as is reasonable in the circumstances prior to the intended travel date.
- 7.5 The principal or RGM is required to provide a decision on whether travel is approved or not within 10 working days of receiving the travel request.
- 7.6 Preparations for travel can be made; however, school-based staff are not to enter into binding arrangements until all required approvals have been granted. Tickets may be tentatively booked, but are not permitted to be purchased.
- 7.7 Travel relating to professional learning is not to be booked until the professional learning application has been approved by all relevant approvers.
- 7.8 Following the approval of the [Request for Approval of Domestic Travel](#) form by the principal or RGM, the school-based staff member can proceed with booking the travel. The school-based staff member must provide all invoices/receipts to the principal or RGM in order to be reimbursed within five business days of the booking date.

#### International travel

- 7.9 In the first instance, a school-based staff member, including a principal who wishes to engage in work-related international travel, should discuss their wishes with their RGM. In the case of a non-principal staff member, staff should consult with their principal in such discussions. Discussions should address why the school-based staff member believes the travel is necessary, and what potential benefits it may have towards student learning and professional development. Once initial discussions are finalised, the RGM will advise the Executive Director of the staff member's wish to engage in work-related international travel.
- 7.10 All international travel by school-based staff is to be approved in advance by the principal. This includes approval of all expenditure on fares, accommodation, allowances, conferences and hospitality.
- 7.11 Staff members requesting approval for international travel are to complete a [Request for Approval of International Travel](#) form to be approved by the RGM or Executive Director at least four weeks prior to travel being undertaken. The form should be signed by the person travelling and their principal or, in the case of a principal, their RGM and should include the following supporting material:
- the itinerary of the person travelling
  - a breakdown of travel expenses illustrating the expected costs for airfares, insurance, accommodation, registration/conference fees, meals, hospitality and incidental expenses.

- 7.12 The General Manager – Financial Services at MACS can provide advice on the conversion of foreign currency if required.
- 7.13 Preparations for travel can be made; however, staff should not enter into binding arrangements until all required approvals have been granted. Tickets may be tentatively booked, but are not permitted to be purchased.
- 7.14 Travel relating to professional learning is not to be booked until the professional learning application has been approved by the principal, RGM or Executive Director where applicable.
- 7.15 When applying for approval of international travel, school-based staff including principals must provide as much notice as is reasonable in the circumstances prior to the intended travel date; however, a minimum of one term's notice must be provided.
- 7.16 The RGM or Executive Director will provide a decision on whether travel is approved or not within 10 working days of receiving the travel request.
- 7.17 The duration of overseas visits should be kept to the minimum required to adequately complete the aims of the visit.
- 7.18 Requests to add private travel onto international travel require the Executive Director's approval in writing and may only be approved if the extension does not create the impression that official travel is being used to subsidise private travel arrangements.
- 7.19 MACS schools are required by law to comply with FBT requirements that are administered by the ATO.
- 7.20 Leave taken may require the school-based staff member to contribute to flight costs in order to avoid the imposition of FBT. The school-based staff member's contribution will usually be proportionate to the number of leave days taken as part of the trip and will be determined by the RGM.
- 7.21 The length of leave taken is to be in reasonable proportion to the duration of the official travel. As a general guide, up to two days of leave may be taken for every seven days of official travel.
- 7.22 Leave or an extension of private travel taken while undertaking work-related travel is not to incur or result in any additional costs to MACS schools.

#### Travel with partners/family

- 7.23 Staff may travel with their partners/family provided that it does not incur any costs at the expense of MACS schools and does not interfere with the business requirements of the travel.

#### Preparing for travel

##### MACS office staff and MACS school-based staff

#### Contact details

- 8.1 Prior to departure, travellers must provide their immediate manager or principal, RGM or Executive Director (where applicable) with an up-to-date copy of their itinerary and contact details for the duration of the trip. Travellers should ensure that their emergency contact information is also up to date. The manager, principal, RGM or Executive Director should be notified as soon as possible if unforeseen circumstances result in any changes to the itinerary.

## Medical

- 8.2 Staff members undertaking international travel are advised to have a complete medical examination prior to their departure and to consult with their doctor regarding immunisations/vaccines and medical requirements for the specific country(ies) being visited. It is the responsibility of staff members to ensure that they arrange the necessary immunisations/vaccines within the required timeframes for their efficacy. MACS or the MACS school will pay reasonable expenses associated with health inoculations etc. on behalf of staff members travelling overseas on official business.

## Insurance

- 8.3 It is the responsibility of staff members to ensure they have appropriate insurance coverage. In relation to MACS office staff, travel insurance will automatically be included in any overseas travel quote provided by Egencia Australia. Staff members are required to include the cost of travel insurance in all expense estimates presented for authorisation.

## Travel advisories

- 8.4 It is the responsibility of the staff member to ensure there are no Department of Foreign Affairs and Trade (DFAT) warnings against travelling internationally to the country(ies) the staff member will visit. A staff member should check the DFAT website [www.dfat.gov.au](http://www.dfat.gov.au) for warnings when preparing their [Request for Approval of International Travel](#) form. This should be repeated in the days preceding departure.

## Visa/work permits

- 8.5 Staff members can check visa/work permit requirements with the appropriate embassy/high commission for the country(ies) they will transit through or visit. It is the responsibility of staff members to ensure they have a valid passport which is not due to expire within six months of the end of the travel, and the correct visa and/or work permit for the nature and length of their visit.

## WorkCover

- 8.6 In the event that a staff member sustains an injury/illness while undertaking official approved travel, they will be covered by the provisions of the *Workplace Injury Rehabilitation and Compensation Act 2013* (Vic.).

## Anti-slavery

- 8.7 As a member of the Australian Catholic Anti-Slavery Network, when travelling both domestically and internationally, staff members are encouraged to source slavery-free certified products during their travels where practicable.

## Expenses incurred during travel

### MACS office staff

- 9.1 Claims for the reimbursement of meals, accommodation and other expenses/incidentals incurred while travelling are to be submitted to the appropriate senior management authority on a [Claim for Reimbursement of Expenses Incurred](#) form and then forwarded to the Finance team for processing. Original receipts and/or tax invoices are to be provided for all expenses in order to substantiate the claim and enable MACS to claim any GST input tax credits.
- 9.2 Claims regarding reimbursement for professional learning require an approved eRequisition in order for the payment to be processed by the Finance team. Refer to the Professional Learning Policy for further information.
- 9.3 For domestic and international travel, reasonable rates applicable for the reimbursement of accommodation, meals and expenses/incidentals are those contained in the current year's ATO Taxation Determination (TD). [TD 2020/5](#): *Income tax: what are the reasonable travel and overtime*

*meal allowance expense amounts for the year?* is available on the ATO's website.

- 9.4 For domestic travel to capital cities, the reasonable rates for daily travel allowance expenses, according to salary levels and destinations, for the current tax year are outlined within [TD 2020/5](#).
- 9.5 For international travel, reasonable accommodation rates should be determined in advance in consultation with the appropriate director.
- 9.6 If expenses are likely to be incurred for the purchase of gifts or hospitality at the destination, these expenses should be included in the staff member's eRequisition and justification for the expenses are to be provided.
- 9.7 Reimbursements are not available for the time spent in transit where meals are provided, for example, on flights.
- 9.8 Any expenses incurred which are not related to the official travel should be paid for privately.
- 9.9 MACS will not reimburse the cost of paying traffic or parking fines and these are the responsibility of the traveller.

#### **MACS school-based staff**

- 10.1 Claims for the reimbursement of meals, accommodation which has not already been reimbursed and other expenses/incidentals incurred while travelling are to be submitted to the principal or RGM where applicable on a [Claim for Reimbursement of Expenses Incurred](#) form for processing. Original receipts and/or tax invoices are to be provided for all expenses in order to substantiate the claim and enable MACS schools to claim any GST input tax credits.
- 10.2 For domestic and international travel, reasonable rates applicable for the reimbursement of accommodation, meals and expenses/incidentals are those contained in the current year's ATO TD. [TD 2020/5: Income tax: what are the reasonable travel and overtime meal allowance expense amounts for the year?](#) is available on the ATO's website.
- 10.3 For domestic travel to capital cities, the reasonable rates for daily travel allowance expenses, according to salary levels and destinations, for the current tax year are outlined within [TD 2020/5](#).
- 10.4 For international travel, reasonable accommodation rates should be determined in advance in consultation with the RGM.
- 10.5 If expenses are likely to be incurred for the purchase of gifts or hospitality at the destination, these expenses should be included in the staff member's travel itinerary and justification for the expenses are to be provided.
- 10.6 Any expenses incurred which are not related to the official travel should be paid for privately.
- 10.7 MACS schools will not reimburse the cost of paying traffic or parking fines and these are the responsibility of the traveller.

#### **Travel diary**

##### **MACS office staff and MACS school-based staff**

- 11.1 In accordance with ATO requirements, MACS and MACS schools need to have obtained a travel diary or similar document from any employee whose travel expenses are incurred for travel within or outside Australia for six or more nights in a row, when the travel is not exclusively for performing

employment-related duties. The [Travel Diary](#) template requires information about the nature of each work or business activity, where and when it took place, the duration of the activity and the date the entry was made.

- 11.2 The diary is to be completed by the travelling staff member, approved by the traveller’s senior management authority in the case of office-based staff and forwarded to the General Manager – Financial Services, principal or RGM within 15 working days of the traveller’s return to the office.

**Conduct while travelling**

**MACS office staff and MACS school-based staff**

- 12.1 When undertaking travel either domestically or internationally for a work-related purpose, MACS office and school-based staff are reminded that they are representing MACS and MACS schools, and must conduct themselves in accordance with the utmost professionalism and comply with all MACS and MACS schools policies and procedures while travelling.
- 12.2 In the event that there is a breach of this policy or any other applicable policy, enterprise agreement or letter of appointment, MACS and/or MACS schools will take appropriate action to address the breach.
- 12.3 The consumption of alcohol while undertaking work-related travel is a health and safety issue for MACS, MACS schools and respective employees. Alcohol consumption while undertaking work-related travel must be kept to a minimum and staff must ensure that any alcohol consumption does not affect their ability to undertake work-related activities.

<b>Responsible director</b>	Director, Catholic Mission, People and Culture
<b>Policy owner</b>	General Manager, Employee Relations
<b>Approving body/individual</b>	MACS Board
<b>Approval date</b>	July 2021
<b>Date of next review</b>	2023

<b>POLICY DATABASE INFORMATION</b>	
<b>Related documents</b>	
<b>Superseded documents</b>	
<b>New policy</b>	

