# Operational Policy: Travel (NAG 4)

## Blind & Low Vision Education Network NZ

## Statement of Intent:

The Blind & Low Vision Education Network NZ (BLENNZ) Board of Trustees has a responsibility to ensure that travel expenditure incurred by BLENNZ is clearly linked to the business of BLENNZ. The Board has delegated responsibility for the implementation and monitoring of this policy to the Principal. The Principal may further delegate some of their responsibilities, as set out in the Board’s delegation policy.

The Principal will ensure that:

* Travel expenditure is on the Board’s business and BLENNZ obtains an acceptable benefit from the travel when considered against the cost;
* Expenses are reimbursed on an actual and reasonable basis; and
* Staff who require to travel on business do not suffer any negative financial effect.

Travel guidelines for senior leaders are reviewed annually as part of the process of review for Letters of Delegation.

## Policy Requirements:

### Process for Making Travel Arrangements

1. All air travel must be approved by the relevant line manager.

2. All bookings for international and domestic travel are to be conducted through BLENNZ’s normal purchase procedures. This includes the booking of accommodation.

3. If, after travel has been confirmed, a staff member chooses to make changes to the booking for personal reasons, the cost of any change is to be covered by the staff member.

### Air Travel

4. When making air bookings consideration must be given to not just cost but also the health and safety of staff travelling. This is particularly important if the travel involves changing flights and/or more than one stop during the duration of the flight. Wherever possible travel must be by the most direct route unless scheduling dictates otherwise. Under these circumstances the best fare available may not be the most appropriate fare to book.

5. All international travel must be authorised by the Principal before it is booked. A proposal must be put to the Principal detailing the purpose of the trip, the expected benefit to BLENNZ which will arise from the professional purposes of the trip and an estimate of costs. The Principal will approve the travel in writing.

6. At the end of an overseas trip the staff member must prepare a report which details the costs incurred, activities that took place, the benefits to BLENNZ of the trip and a detailed financial report. This report should be forwarded to the Principal within eight weeks of the completion of the trip.

7. In general, and unless there are exceptional circumstances approved by the Principal, all international air travel is to be economy class. If staff choose to do so, they may upgrade at their own cost.

8. Staff members returning direct from long distance travel on BLENNZ business may seek their line manager’s approval for an appropriate rest period before commencing work.

### Accommodation

9. When visiting Auckland, accommodation on the Homai Campus is the first option. Off site accommodation is to be used only when on site accommodation is not available.

10. When staying off site staff should opt for good but not superior accommodation. If there are concerns in terms of location or security that could affect the health and safety of staff, upgraded accommodation may be approved by the relevant Senior Manager. In exceptional circumstances Air B&B can only be used, however this can only be used with the approval of the Principal on a case by case basis.

### Reimbursement of Expenses

11. Expenses whilst travelling will be reimbursed on production of receipts and will be in line with the BLENNZ Staff Reimbursement of Expenses Policy and Guidelines. Travel allowances will be paid in terms of the relevant Collective Employment Agreement. For travel within New Zealand, actual and reasonable expenses are those incurred above the normal day to day costs. For expenses incurred in New Zealand there should be a GST invoice to ensure that GST can be claimed.

12. If koha or a gift is to be given during the period of travel, authorisation for the value of the intended koha/gift should be received from the relevant Senior Manager prior to travel (refer Gift Policy).

13. All personal expenditure is to be met by the staff member. Examples of this are: mini bar purchases, in house movies and laundry.

14. When travelling overseas staff must check first with Digital Practice Lead about whether taking their BLENNZ mobile phone is appropriate and if so data roaming can be organised.

### Vehicles

14. 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 Principal.

15. Use of private vehicles is to be approved by line managers and reimbursement will be at the rate specified in the appropriate Collective Employment Agreement.

16. If taxis are used then staff should pay for the taxis and obtain a receipt and seek reimbursement through petty cash or as part of an expense claim. Members of the Board, Senior Management and Leadership Teams who have been issued with either a Taxi Card or BLENNZ visa card, may use these.

### Discretionary Travel Benefits

17. BLENNZ will not meet expenses incurred on behalf of a spouse or travelling companion. In the event of a person travelling with a non employee, a reconciliation of expenses should clearly demonstrate that BLENNZ did not incur additional expenditure.

18. Personal travel will not be booked through BLENNZ unless under exceptional circumstances and approved by the appropriate Senior Manager.

## Supporting Documents

BLENNZ Policies

Collective Employment Agreements

Approved: 

Date: 5 July 2024

Next Review: 2027