

Staff Travel Guidelines



ORIGINAL AUTHOR: Charles Weber
REVISED BY: Ian Mead
DEPARTMENT: Corporate & Technical Services
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Staff Travel Guidelines

1. Purpose
2. Principles
3. Application for Travel
4. Expenses
5. Reporting
6. Additional Information
7. Appendix



1. Purpose

These guidelines explain the rights and responsibilities of employees undertaking official travel and delegates directing employees to travel. It also explains the principles that should guide delegates in addressing associated issues such as hours of duty, the use of private vehicles and use of Cabcharge.

The guidelines apply to all Council's staff members who travel to or from any location in Australia in respect of activities directly relating to Council's business.

TYPES OF TRAVEL

For the purposes of this policy:

- **Sydney** - is travel within metropolitan Sydney
- **New South Wales** – is travel outside of metropolitan Sydney
- **Interstate** – is travel to other states and territories of Australia
- **International** – is travel outside of Australia.



2. Principles

2.1 Employees and delegates travelling on official business should be guided by the following principles:

- The guidelines must be interpreted and applied in accordance with Council's Code of Conduct, the Procurement Policy and the provisions of the Local Government Act including maintaining the highest ethical standards.
- Travel must contribute to the achievement of Waverley Council's Delivery Program objectives.
- Travel arrangements should be transparent and made in the expectation of external scrutiny.
- Travel arrangements must represent an efficient and effective use of funds. Arrangements should be sensible and practicable.
- Failure to comply with the requirements in these guidelines may lead to disciplinary action, criminal action, or both.

DEMONSTRATING VALUE TO COUNCIL

Travel will be considered on the basis of one or more of the following criteria:

- an expected direct benefit to Council of business related activities and or decisions associated with the trip
- a significant professional development or study opportunity, or an attendance at a conference that is likely to increase the effectiveness of the employee's role at Council, and
- a significant information gathering assignment that will assist Council to capitalise on major trends or opportunities.



3. Application for travel

3.1 These guidelines apply to all Waverley Council employees undertaking travel, including travel for:

- conferences and seminars
- business meetings or visits
- training, study or other professional development
- any travel funded for individuals who accompany an employee, or
- any travel for employees and delegates sponsored by a third party (in part or whole).

An employee is said to have 'travelled' when they go to a place from which it would be unreasonable to expect them to return home if the employee was required to work there the following day. The guidelines do not apply to part day attendance and only when overnight accommodation is incurred.

Approval will only be given where sufficient funds are available in the relevant budget. The proposed times of departure and return should be consistent with the purpose of the travel.

Staff members with delegations to approve travel applications may only approve applications.

TRAVEL APPLICATIONS

Intending employees must identify:

- the purpose of the trip
- actual or potential value to Council
- proposed itinerary, and
- estimate of all costs associated with the trip.

This information with any additional attachments must be supplied on the prescribed application form.



The following table reflects the approval required for travel:

	General Manager	Directors	Divisional Managers	Other Employees
Sydney	No Approval Required	No Approval Required	No Approval Required	Supervisor Approval Required
New South Wales (outside of Sydney)	No Approval Required	No Approval Required	Director Approval Required	Divisional Manager Approval Required
Interstate	Mayoral Approval Required	General Manager Approval Required	Director Approval Required	Director Approval Required
International	Mayoral Approval Required	General Manager Approval Required	General Manager Approval Required	General Manager Approval Required

A request for permission to travel must be received from the Supervisor, Divisional Manager, Director, or the General Manager, at least two weeks prior to the intended departure date.

TRAVEL BOOKINGS

Booking of tickets for travel should be arranged through your individual Director once the travel has been approved.

ACCOMMODATION BOOKINGS

Booking of accommodation should be arranged through your individual Director once travel has been approved. It is acceptable for accommodation to form part of a package for a conference.

Where it is not practicable for accommodation to be paid in advance of the travel, employees are expected to pay using their own funds, to be reimbursed by Council after completion of travel.

Employees may use four star accommodation. Standard rooms will be booked, except in special circumstances which require a higher level of accommodation. In those cases, employees must obtain the prior approval of the relevant Director or the General Manager. Employees may accept room upgrades



offered by an accommodation or travel provider only if the upgrade is at no additional cost to Council.

TRAVEL BY ASSOCIATES

Council will not normally pay for travel or related expenses for a person who is not part of Council's staff ('associate'). However, there may be situations where a spouse or other associate of an employee accompanies the employee. Associates will be responsible for their own expenses.

Council is not responsible or liable for the actions of associates, or injury or damage suffered by associates.

TRAVEL PAID BY ANOTHER ORGANISATION

Travel in response to invitations from inter-governmental or official agencies, governments or private organisations (where all or part of the costs are to be met by the organisation that extended the invitation) are subject to this policy.

Employees undertaking travel must discuss any possible conflicts of interest with their immediate supervisor, a Director or the General Manager. Employees must avoid situations where they could be perceived as using their office to advance the interests of other organisations or interest groups.

This section should be read in conjunction with the *Code of Conduct for Staff, Delegates and Volunteers*.

LEAVE DURING TRAVEL

Employees must seek approval before they travel for any form of leave or leave without pay to be taken during any domestic or international travel.

Requests to add private travel onto official travel should only be approved if the extension does not create the impression that official travel is being used to subsidise private travel arrangements.

Leave, or an extension of private travel, taken while undertaking work related travel must not incur or result in any additional costs to Council. The person who authorises the travel may require an employee to reimburse a reasonable proportion of the official travel expenses to offset any private travel.

COUNCIL BUSINESS WHILE ON PERSONAL TRAVEL

If the General Manager or the person authorising travel asks the employee to undertake work-related activity or represent



Council during a period of personal travel, the employee may claim reimbursement of reasonable expenses provided that the expenses are authorised in advance.

Work-related expenses not authorised in advance, which are incurred during personal travel within Australia or overseas, may be claimable as a tax deduction through the individual's tax return, and will not be reimbursed by Council.

AIR TRAVEL

All air travel is to be up to the following class:

Travel Type	Class of Travel
International	Business Class
Domestic	Economy Class

Unless otherwise authorised, travel is to be by the most economical and direct route.

RAIL TRAVEL

All employees may use first class train travel, when available, on trips of over two hours or if authorised by a Director or the General Manager. Otherwise, employees must use economy travel unless no economy seats are available.

MOTOR VEHICLES

Taxis

Taxis should only be used for official purposes, such as:

- from home to the airport and return
- from the airport to the place of business or accommodation
- between places of business, or
- when returning home from working significantly later than normal office hours.

Wherever possible, employees should pay the fare and obtain a valid receipt or tax invoice so that they can be reimbursed on completion of travel. Cabcharge vouchers can be provided and used to pay for taxi fares.

Vehicle Hire



The hire of vehicles should match the needs of the particular situation. The cost should always be compared with the use of taxis and the least expensive vehicle (that is practical for the purpose) should be chosen. Hire car insurance is to be included in the company-negotiated rate.

Parking fines or driving offences are the responsibility of the vehicle driver. The driver is also responsible for having a current driver's licence.

Using Council Vehicles

Employees may use a vehicle owned, leased or otherwise controlled by Council provided that:

- the employee is the designated driver for that vehicle or has been authorised to drive it by the appropriate manager or Director or the General Manager, and
- with trips in excess of 350 kms the most cost effective method of travel should be utilised including air travel, hiring a car, or alternate transportation,
- when using Council vehicles, employees should make themselves aware of any other Council policies and procedures that apply to them.



4. Expenses

TYPES OF EXPENSES

The cost of travel may include:

- air, rail or bus tickets or fares
- hotels, motels or other accommodation
- conferences
- other transport costs, such as taxis, vehicle hire, own vehicle costs
- food and drink
- telephone calls and messages
- dry cleaning and laundry
- medical expenses, or
- other reasonably necessary items.

NO CASH ADVANCES

Council does not provide cash advances for travel expenses under any circumstances.

REIMBURSEMENT

For a Council staff member who claims a reimbursement less than \$100 the processed will be undertaken as petty cash, and claims over \$100 will be processed by deposit to the employee's nominated bank account.

A delegate (such as a contractor or consultant), claims for reimbursement will be paid only on appropriate tax invoices.

PROVING EXPENSES

Employees must provide Council with documentary evidence of each expense incurred by them and their associates (if any) or by Council within one week of their return from travel. Original documents must be provided as copies will not be accepted.

For all reimbursement claims, employees must complete the prescribed Expenses Claim Form. Contractors or consultants must provide adequate information in, or in addition to, their tax invoices.



REASONABLE EXPENSES

Employees are entitled to breakfast, lunch and dinner at their accommodation location, or at an alternative venue.

The cost of reasonable ancillary services such as dry cleaning, laundry will be reimbursed upon return when personal funds have been used.

Council uses the Australian Taxation Office (ATO) guidelines to determine the reasonable level of expenses for meals and sundry expenses and accommodation when it cannot be paid for in advance. The current guidelines are available in the Appendix.

For items that cannot be paid for in advance Council will reimburse for expenses incurred while travelling per the limits of the allowances set out in the Australian Tax Office's Taxation Determination TD 2011/17 or such determinations or policies of the Australian Tax Office that supersede it.

Any discrepancy between these guidelines and the expenses claim will be referred to the Divisional Manager Human Resources for a review and if applicable, further action in accordance with Council's policies.

AUTHORISED TRAVEL AND PRIVATE TRAVEL

Travel Diary

For domestic travel, if the travel is for greater than five consecutive nights or if the travel includes a portion of "private" travel it is necessary for a travel diary to be kept.

A travel diary must be kept for all international travel.

The travel diary should be in the prescribed format (attached) and submitted to Council's Taxation Manager within one week from the return from travel.

The travel diary must include particulars relating to:

- the place where the activity was undertaken
- the date and approximate time when the activity commenced
- the duration of the activity, and
- the nature of the activity.

A travel diary is a statutory evidentiary document and Council must retain it and the documentary evidence for six years.



Private travel is regarded as being travel over a period extending beyond that needed to conduct the authorised activity and/or travel with an associate, who is not an employee".

Reimbursing Council for Associate Expenses

Council requires employees to reimburse Council for the total expenses incurred by associates when payment is made by Council plus GST within seven days of the completion of the travel. The General Manager may determine that no contribution is required (or the Mayor where the associate is travelling with the General Manager).



5. Reporting

AIM

Council's aim is to maximise the return from the cost of employees undertaking travel by sharing some of the knowledge or expertise gained with others in the organisation.

Whether or not required to report back formally, it is expected that employees implement and share relevant knowledge or expertise gained while travelling.

SYDNEY, NEW SOUTH WALES & INTERSTATE TRAVEL

Employees attending a conference or other event are not generally required to report back as the benefits and knowledge gained is generally shared in forums and deliberations on the organisation's initiatives, projects and programs.

However, the General Manager or a Director may require an employee to provide a report, debriefing and or presentation on reasonable notice.

INTERNATIONAL TRAVEL

Travellers attending an international conference, seminar, meeting or other event are required to provide a report, debriefing and or presentation to the General Manager, Directors and or relevant work area.



6. Additional information

INSURANCE

Employees who are Council employees are covered by Workcover under the *Workers Compensation Act 1987*, both in Australia and overseas while on Council business.

Council also has insurance policies that cover certain personal property belonging to employees whilst engaged in activities connected with or on behalf of Council. Employees are responsible for making themselves aware of the conditions and limitations of any insurance cover.

PASSPORT AND VISAS

Any employee who travels overseas is responsible for ensuring that they hold a passport that is current during the period of travel and for obtaining any necessary visas.

Council reimburses the cost of visas but not passports.



Travel Application

Name	
Division	
Department	
Destination	
Date(s)	
Purpose or Event [If attending a conference or seminar please provide copy of the agenda or itinerary]	
Benefits for Council [list briefly but in sufficient detail]	
Air, rail, bus, car (hire car, Council car or own car)?	
Estimated total cost [you must attach details of all likely costs to this form]	
Are other staff members or Councillors going? If so, will you be travelling together? [please detail]	
Are any non-staff members going? If so, will you be travelling together? [please detail]	



Travel Application (continued)

Does the travel include personal travel or leave? [please detail]	
Is additional overnight expenses required after or before the a conference or seminar? [please detail]	
Applicant Comments (if any)	
Signature of Staff Member	
Date	
Signature of Approver	
Name	
Position	
Date	
Approver Comments and or Conditions attached to Approval (if any)	
<p>ONCE APPROVAL HAS BEEN GRANTED PLEASE FORWARD TO HR/OD FOR INCLUSION ON THE EMPLOYEES PERSONNEL FILE AND A COPY TO COUNCIL'S TAXATION MANAGER</p>	





FORM 1

EXPENSES CLAIM FORM

Date:

Use this form only for
General Travel Expenses

Name of Staff Member:

Claim Period:

<i>From: = 1st Day</i>	<i>To: = Last Day</i>

Telephone calls incurred while on Official Business -		
<i>Description of incurred expenditure</i>	<i>CODE</i>	<i>Claim Amount</i>
Mobile Telephone Calls	495	
Other Telephone Calls	496	
Total:		

Other Travel Expenses while on Official Business (NOT meals, private vehicle, air, rail or bus)			
<small>Please circle the correct CODE (Local 678, Interstate 534)</small>			
<i>Date</i>	<i>Purpose eg To & From Council meetings and Mode (eg Taxi)</i>	<i>CODE (circle)</i>	<i>Claim Amount</i>
		678 or 534	
Total:			

Allowance for use of Private Vehicle while on Official Business				
<i>Is the vehicle engine Over 2,700 cc? (Please circle as appropriate)</i>			<i>Yes / No</i>	
<i>Rate and Claim Amount will be calculated as per Award Conditions</i>			<i>Rate</i>	
			<input style="width: 80px; height: 20px;" type="text"/>	
<i>(Do not complete)</i>				
<i>Date</i>	<i>Purpose of travel eg To & From Council meetings</i>	<i>Distance klms</i>	<i>CODE</i>	<i>Claim Amount</i>
			613	
			613	
			613	
			613	
			613	
Total:				

Please continue to next page ...



Meals purchased while on Official Business					
<i>Date</i>	<i>Type of meal (please circle)</i>			<i>CODE</i>	<i>Claim Amount</i>
	breakfast	lunch	dinner	648	
	breakfast	lunch	dinner	648	
	breakfast	lunch	dinner	648	
	breakfast	lunch	dinner	648	
	breakfast	lunch	dinner	648	
	breakfast	lunch	dinner	648	
	breakfast	lunch	dinner	648	
Total:					

Air, rail or bus tickets or fares					
<i>Date</i>	<i>Purpose of travel eg To & From Conference</i>	<i>Air, rail or bus</i>	<i>CODE</i>	<i>Claim Amount</i>	
Total:					

TOTAL EXPENSES CLAIMED

I attach the relevant receipts or bill statements and declare that the above expenses were incurred by me and are payable in terms of Waverley Council's *Staff Travel Policy*.

I declare that these expenses relate to travel that was entirely in the course of Council's business.*

* Delete if not applicable, in which case attach your travel diary.

Signature of Staff Member:

Approved by:





Waverley Council

Travel Diary

Form 2

Date:

**Please use this form
General Travel Diary**

Name of Staff Member:			
Position of Staff Member:			
Claim Period			
From - First Day		To - Last Day	
Period			
Details of Travel – Daily Activity Log			
Location	Date and Time the activity commenced	Duration and Time the activity ended	Nature of the business activity
I have attached the relevant information and declare that the above details are in accordance with Waverley Council's Staff Travel and other Policies.			
Signature of staff member			

