THE UNIVERSITY OF NOTRE DAME AUSTRALIA

Policy:

Travel

Effective: 8 November 2023

Audience: Employees, students, Board and Sub-committee members

Policy Category: Management
Policy Sub-category: Finance and Procurement

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Policy Owner:	Chief Financial Officer
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1 OBJECTS OF THE UNIVERSITY

The University's Objects are defined in Section 5 of its Act of Parliament:

The Objects of the University are:

(a) the provision of university education, within a context of Catholic faith and values; and
(b) the provision of an excellent standard of -
    i. teaching, scholarship and research;
    ii. training for the professions; and
    iii. pastoral care for its students.

2 PURPOSE

2.1 The purpose of this policy is to assist the University to achieve the objectives of:
- **2.1.1** ensuring responsible stewardship of the University's resources in all travel arrangements;
- **2.1.2** maintaining appropriate records related to all travel and travel expenditure; and
- **2.1.3** fulfilling its duty of care to all employees, students, Board Members and Sub-committee Members and others who may be required to travel on University Business.

3 SCOPE

3.1 This Policy applies to all University staff, students, Board Members, Sub-committee Members and any other approved persons undertaking official University domestic and international business travel (travellers), fully or partially supported by the University regardless of funding source**.**

3.2 It also applies to persons involved in planning and approving travel arrangements for University Business.

4 PRINCIPLES

4.1 Travellers are obliged to exercise responsible stewardship of the University's resources, by obtaining best value for money in all aspects of travel and exercising appropriate restraint in expenditure, including but not limited to:
- **4.1.1** using the most cost-effective travel option (lowest logical fare) in the relevant fare type;
- **4.1.2** using a safe and reliable carrier;
- **4.1.3** taking the most direct available routes;
- **4.1.4** planning travel to minimise time away from the University which impacts on business operations; and
- **4.1.5** planning travel at times and on dates within a reasonable timeframe of the required departure and arrival times.

4.2 Travellers represent the University while travelling on University Business and must conduct themselves consistently, and in accordance with the University Objects, the *Code of Conduct* and all applicable University policies.

4.3 Alternatives to travel such as teleconferencing and videoconferencing must be duly considered to support sustainability initiatives at the University.

4.4 All University travel requirements must be arranged through the Travel Management Company (TMC) engaged by the University.

4.5 Travel approvals

4.5.1 All travel is required to be approved by the delegated authority (Delegate) indicated in Schedule B: Financial Delegations in the *Standing Delegations of Authority*; and

4.5.2 All travel undertaken for University business is subject to approval regardless of the source of funds or any private travel component.

4.6 Traveller safety

4.6.1 The University is committed to protecting the health and safety of employees and students undertaking University related travel.

4.6.2 The University's TMC provides 24-hour traveller assistance to assess, manage and monitor the risks associated with international travel.

4.6.3 Travellers and approvers must take a risk management approach to planning, approving and undertaking of University travel by considering:

4.6.3.1 the potential risks associated with destinations, transport, work or study activities to be undertaken and any individual characteristics/requirements of travellers;

4.6.3.2 any pre-existing medical conditions that may be aggravated by or difficult to manage or treat during travel;

4.6.3.3 any applicable travel advisories or travel warnings issued by state government or Australian Government websites; and

4.6.3.4 any travel safety guidelines prepared by the Director, Health, Safety and Wellbeing.

4.6.4 An approved risk assessment management plan is required for all international travel and for any other travel that requires specific risk controls to be in place (refer to the Travel Procedure for further information).

4.6.5 Travellers must take all reasonable steps to remain contactable while travelling.

4.6.6 The University reserves the right to deny travel where any University or other travel restrictions are in place.

4.7 Travel restrictions

4.7.1 The Deputy Vice-Chancellor Finance and Chief Operating Officer or the Director, Risk & Assurance may impose a complete travel ban to certain destinations and may require travellers to alter their travel itinerary or to return home.

4.7.2 Travellers must comply with all such plans and directives.

5 ROLES AND RESPONSIBILITIES

5.1 Approvers are responsible for confirming that travel requests are in accordance with:

5.1.1 Principles of this Policy;

5.1.2 Other relevant University policies and procedures; and

5.1.3 Relevant legislation and contract requirements, including grant funding agreements.

5.2 Travellers are responsible for:

5.2.1 Providing documentation needed to substantiate the University Business purpose of the travel;

5.2.2 Retaining evidence of business expenditure by submitting images and/or the originals for all travel related receipts or tax invoices;

5.2.3 If the pre-approved travel diary has changed during the trip, submit the updated travel diary to the relevant approver for approval within 10 business days from the return date;

5.2.4 Booking private days as leave within the HCM PeopleSoft system;

5.2.5 Ensuring funds are acquitted within the stipulated time frames, in accordance with the *Policy: Procurement* and supporting procedures; and

5.2.6 Ensuring that the acquittal for all travel expenses identify the travel booking that each travel expense refers to.

5.3 The **Chief Financial Officer** will ensure systems and processes are maintained to support the implementation of this Policy and to monitor compliance with its requirements.

6 RELATED DOCUMENTS

6.1 *Procedure: Travel*
6.2 *Policy: Standing Delegations of Authority*
6.3 *Guideline: Business Expense*
6.4 *Policy: Critical Incident Management*
6.5 *Procedure: Critical Incident Management*
6.6 *Policy: Risk Management*
6.7 *Procedure: Risk Management*
6.8 *Employee Code of Conduct and Ethical Behaviour*
6.9 *Student: Code of Conduct*

7 DEFINITIONS

7.1 For the purpose of this Policy, the following definitions apply*:*

7.1.1 ***Approver*** means the employee(s) authorised to approve travel in accordance with Schedule B: Financial Delegations the *Standing Delegations of Authority*.

7.1.2 ***Board Members*** means individuals appointed to the Board of Directors and Board of Trustees of The University of Notre Dame Australia, including the Chancellor and Vice Chancellor.

7.1.3 ***Delegate*** has the same meaning stated in the *Standing Delegations of Authority*.

7.1.4 ***Employee*** means an Academic employee and/or a General Employee, as defined by *The University of Notre Dame Australia Staff Enterprise Agreement 2018-2021*, or its replacement.

7.1.5 ***Student*** means any persons currently enrolled in the University with an enrolment load greater than zero.

7.1.6 ***Sub-Committee Members*** means individuals appointed to a Sub-Committee of the Board of Directors. These may include both Board and non-Board members.

7.1.7 ***Supervisor*** means an employee's line manager.

7.1.8 ***Travel*** means travel on University business.

7.1.9 ***Traveller/s*** means anyone who travels on behalf of the University, including but not limited to:

a) Employees;
b) Anyone accompanying Employees representing or engaged in University business;
c) Students;
d) Board Members and Sub-Committee Members; and
e) Other persons and/or visitors whose travel is associated with and paid by the University.

7.1.10 ***Travel Management Company*** **(TMC)** means the travel management company approved from time to time to organise, arrange and book travel.

7.1.11 ***University*** means The University of Notre Dame Australia.

7.1.12 ***University Business*** means any of the following pre-approved activities, regardless of the funding source:

(a) Activity related to employment;
(b) Career development;
(c) Research activities on behalf of the University;
(d) Exchange;
(e) Fieldwork;
(f) Practicum;
(g) Conferences;
(h) Study Tours;
(i) Internships undertaken while studying at the University; or
(j) Board and Board Sub-committee activities, including meetings, workshops, retreats and induction activities.

Version	Date of approval	Approved by	Amendment
1	21 May 2018	Vice Chancellor	Effective date – new Policy.
2	24 January 2020	Acting Vice Chancellor	Minor amendments to clauses 6, 8 and 10 to accord with updated streamlined processes.
3	25 February 2020	Chief Financial Officer	Minor amendments to clauses 8 and 13 to accord with updated processes and approval of new Guideline: *Board Member Travel*.
4	1 June 2021	Chief Financial Officer	Amendments to reflect new roles, inclusion of COVID-19 information and change to approval process for travel advances.
5	25 October 2022	Vice Chancellor	Major changes - amendments to reflect new Travel request, approval and booking system.
6	8 November 2023	University Secretary	Consequential edit to add reference to *Employee Code of Conduct and Ethical Behaviour* (replaced Staff Code of Conduct)