



TRAVEL POLICY 2018

The Vice-Chancellor as delegate of the Senate of the University of Sydney, adopts the following policy.

Dated: 11 December 2017

Last amended: 23 June 2020

Signature:

Position: Dr Michael Spence

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1 Name of policy

This is the Travel Policy 2018.

2 Commencement

This policy commences on 1 January 2018.

3 Policy is binding

Except to the extent that a contrary intention is expressed, this policy binds the University, staff, students and affiliates.



4 Statement of intent

This policy:

- (a) provides a framework for managing travel undertaken for University work or study, which supports:
 - (i) traveller safety;
 - (ii) efficiency;
 - (iii) responsible financial management; and
 - (iv) statutory and regulatory compliance;
- (b) operates consistently with:
 - (i) the University's safety management system, as provided in the [Work Health and Safety Policy 2016](#); and
 - (ii) the [Procurement Policy](#);and
- (c) reflects the University's values of:
 - (i) respect and integrity; and
 - (ii) openness and engagement

Note: See the [University's Strategic plan 2016-20](#).

5 Application

- (1) This policy applies to all travel undertaken on behalf of the University or for the purposes of University work or study, which involves:
 - (a) a trip of 100 kilometres or more from the traveller's usual workplace; or
 - (b) an overnight stay.
- (2) This policy applies to travel funded by a third party, but travellers are also required to meet any additional requirements of the funding body.

6 Definitions

affiliate	has the meaning provided in the Code of Conduct – Staff and Affiliates . At the date of this policy, that is: <ul style="list-style-type: none">clinical title holders; adjunct, conjoint and honorary appointees; consultants and contractors to the University; holders of offices in University entities, members of Boards of University Foundations, members of University Committees; and any other persons appointed or engaged by the University to perform duties or functions on its behalf.
Dean	means, as appropriate, Executive Dean, Dean or Head of School and Dean or Dean (University school).



delegate	means a person with appropriate delegated authority under the University of Sydney (Delegations of Authority) Rule 2020 .
fieldwork	has the meaning provided in the Fieldwork Safety Standards . At the date of this policy, that is: practical teaching and research activities carried out in the natural environment or community, away from the normal support networks of the University. Refer to <i>Appendix B</i> for examples.
Head of Administrative Area (HOA)	has the meaning provided in the University of Sydney (Delegations of Authority) Rule 2020 . At the date of this policy, that is: means a senior staff member: <ul style="list-style-type: none">- outside a faculty or University school;- whose position is declared as an HOA by the Senior Deputy Vice-Chancellor in writing; and- who is recorded as an HOA in in the relevant human resources recordkeeping systems. Where appropriate, a reference to HOA includes a reference to The Director, Law Extension Committee.
Head of School (HOS)	has the meaning provided in the University of Sydney (Delegations of Authority) Rule 2020 . At the date of this policy, that is: means: <ul style="list-style-type: none">• a head of a school within a faculty (including a Head of School and Dean within a faculty); or• a head of an equivalent budget unit, formally appointed as HOS by the Provost. Where appropriate, a reference to a HOS includes a reference to The Director, Law Extension Committee
independent contractor	has the meaning provided in <i>the</i> Workforce Engagements and Payments Policy 2016 . At the date of this policy, that is a party engaged directly by the University pursuant to a contract for services. This includes sole traders, companies or partnerships with whom the University enters into an agreement for the provision of specific individuals to supply specific skills, services or consultancy arrangements. It does not include individuals engaged through labour hire agencies.



manager

means:

- **in the case of a staff member:** the person nominated by the University from time to time as the staff member's supervisor, as recorded in the Human Resources information system;
- **in the case of an affiliate:** the University officer nominated as responsible for their engagement,
- **in the case of a student:** the relevant head of school.

procedures

means the [Travel Procedures 2018](#)

travel advisory

means formal advice about particular destinations issued by:

- the [Department of Foreign Affairs and Trade](#), or
- a commercial travel advice service engaged by the University, the details of which are published on the travel website.

7 General principles

- (1) Travel approval is required for all travel.
- (2) Where possible, communications technology should be used to minimise the need for travel.
Note: See [Environmental Sustainability Policy 2015](#)
- (3) Subject to the provisions of this policy and the [procedures](#), travellers must:
 - (a) obtain best value for money;
 - (b) use the lowest fare available at the time of booking, for economy class travel unless otherwise approved under sub-clause 7(6) or as prescribed in the procedures;
 - (c) use a safe and reliable carrier;
 - (d) take the most direct available routes;
 - (e) plan travel such as to minimise time away from the University which impacts on team and operational requirements;
 - (f) travel at times and on dates within a reasonable timeframe of the required departure and arrival times; and
 - (g) arrange travel with a University approved travel management company and supplier.
- (4) University travellers must conduct themselves consistently with all applicable University policies, including but not limited to:
 - (a) [Code of Conduct – Staff and Affiliates](#);
 - (b) [Student Charter 2020](#);
 - (c) [Research Code of Conduct 2013](#);
 - (d) [Acceptable Use of ICT Resources Policy 2019](#);
 - (e) [Work Health and Safety Policy 2016](#).



- (5) Where appropriate, adjustments to travel arrangements must be made to accommodate the specific requirements of people with disability.
- (6) Exceptions to these principles, including additional travel expenses, may be approved in exceptional circumstances as set out in the [procedures](#).

8 Travel safety

- (1) Those planning travel must consider:
 - (a) risks associated with:
 - (i) destinations;
 - (ii) modes of transport;
 - (iii) work or study activities to be undertaken;
 - (iv) individual characteristics of the travellers; and
 - (b) any applicable travel advisories.
- (2) Those planning travel to destinations classified by the University as 'high risk' or 'very high risk' must complete a travel risk assessment.

Note: Refer to the travel risk matrix in Schedule One, which sets out the travel risk levels.
- (3) The Director, Safety Health and Wellbeing may develop travel safety guidelines, which will be published on the travel website. University travellers should comply with such guidelines where possible.
- (4) Travellers must take all reasonable steps to remain contactable while travelling.

9 Insurance

- (1) The University provides travellers with appropriate travel insurance, including emergency support. Details of cover are provided on the [University website](#).
- (2) Unless legally obligated to do so, the University will not provide insurance for:
 - (a) personal travel;
 - (b) accompanying persons; or
 - (c) independent contractors.

10 Travel approval

- (1) Travellers who require approval must obtain it before travelling, unless otherwise permitted by the [procedures](#).
- (2) Travel expenses incurred without prior approval may be classified as a personal expense.
- (3) Travellers must obtain approval from:
 - (a) their manager or other relevant delegate;

Note: if the amount to be spent exceeds the relevant manager's delegation, then approval must be escalated to a position which holds the necessary financial delegation. See [University of Sydney \(Delegations of Authority\) Rule 2020](#).



and

- (b) if the destination is international and the purpose of the travel is to conduct fieldwork, by the relevant head of school.
- (4) If the destination is classified by the University as 'high risk' or 'very high risk', travellers must also obtain approval from the relevant Principal Officer, under the [University of Sydney \(Delegations of Authority\) Rule 2020](#).

Note: The University's determination of destination risk level is based on relevant travel advisories. See Schedule One of this policy.

- (5) Where the person responsible for approving travel is not the person responsible for the nominated account from which the travel is to be funded, the approval of both must be obtained before travel expenses are incurred.
- (6) A traveller may not under any circumstances authorise their own travel or reimbursement of their own travel related expenses.
- (7) Those approving travel must consider:
- (a) the intended objectives of the travel, and their alignment with overall University objectives;
 - (b) the timing and maximum duration of the travel permitted by their head of school or head of administrative unit to meet the work area's operational requirements, such as coverage for absences.
 - (c) risks associated with undertaking the travel;
 - (d) proposed arrangements for communications between the traveller and the University; and
 - (e) The availability of sufficient funding.
- (8) Travellers may use personal funds or reward points to fund upgraded travel or increased travel expenses where this is not an approved University expense.
- (a) Such arrangements must be made independently of the University and not processed through University systems.

11 Travel bookings and itineraries

- (1) Except where permitted by this policy and the [procedures](#), travel bookings must be made through University preferred suppliers.
- (2) Personal preferences, airline memberships and reward program memberships (such as frequent flyer programs) are not themselves sufficient to warrant selection of a non-preferred supplier.

Note: See [travel website](#)

- (3) Travellers must provide their manager with access to their current itinerary.
- (4) Travel must be booked using one of the following methods, listed in order of preference.
- (a) the University's [online booking tool](#); or
 - (b) the University's appointed [travel management company](#).



- (5) In exceptional circumstances, travel may be booked through a non-preferred booking channel. Such circumstances include:
 - (a) where the travel requires specific capabilities which the preferred booking channel cannot provide (such as fieldwork or where the activities need to be arranged as part of a conference supplied package); and
 - (b) where a third party provider can provide cheaper pricing at the same level of safety; and:
 - (i) the preferred booking channel cannot match the quoted price; and
 - (ii) this is evidenced in writing from the preferred booking channel (e.g. by means of a quote).

12 Associated leave

- (1) University staff are considered to be at work while on approved University travel, including between periods of approved travel when it is impractical to return to their normal place of work. This does not include periods of personal travel when a staff member is on approved leave.
- (2) The relevant manager may approve personal travel in conjunction with approved University travel, provided that:
 - (a) the absence is not inconvenient to the staff member's faculty, school or business unit;
 - (b) the University will not incur Fringe Benefit Tax liability; and
 - (c) the leave is approved consistently with the [University's standard leave booking process](#).
- (3) If the personal component of the travel is more than incidental, this may result in the University being liable for Fringe Benefits Tax. For calculating Fringe Benefits Tax liability, the time away starts when the traveller leaves home or work and ends when they arrive back at home or work.
- (4) The traveller must separately pay for all costs associated with personal travel, including travel insurance. These costs will not be paid or reimbursed by the University.
- (5) If:
 - (a) a trip involves personal travel which is 30% or more of the total days away; then
 - (b) the staff member must personally pay 50% of the airfares.

Note: See [travel website](#) for FAQ.

13 Spouses, partners and dependants

- (1) The University will not pay for costs incurred for an accompanying spouse, partner or dependant unless:
 - (a) the travel is part of a program approved under the [Special Studies Program Policy 2015](#); or



- (b) there are special circumstances and the costs are approved:
 - (i) by the relevant Dean;
 - (ii) by the Provost;
 - (iii) by the Vice-Principal (Operations); or
 - (iv) as prescribed in the [procedures](#).

Note: Fringe Benefits Tax may apply to travel payments made by the University for accompanying spouses, partners or dependants.

- (2) Travellers must ensure that University activities for which the travel has been approved are not compromised by the presence of an accompanying spouse, partner or dependant.

14 Travel expenses

- (1) This clause does not apply to travel which is part of a program approved under the [Special Studies Program Policy 2015](#).
- (2) The University will pay for approved reasonable business costs for travel, conferences, meals and incidental expenses.

Note: Refer to the procedures for details of allowable expenses. See also the [Non-Allowable Expense Procedures 2018](#).

- (3) Travellers must complete expense claims and acquittals in the manner prescribed in the procedures.

15 Responsibilities

- (1) **Travellers are responsible for:**

- (a) planning their travel, including appropriate controls to manage identified risks;
- (b) ensuring that there are sufficient funds in the nominated account/s to cover the cost of their travel;
- (c) reading relevant travel advisories;
- (d) assessing their own fitness to travel and obtaining necessary vaccinations;

Note: The University will reimburse travellers for the cost of vaccinations required for their specific travel destinations, other than for vaccinations listed in the [National Immunisation Program Schedule](#).

- (e) possessing a valid passport, appropriate visas and complying with relevant immigration requirements;
- (f) providing true and complete information to relevant managers;
- (g) obtaining necessary approvals under this and any other applicable policy or procedures;
- (h) ensuring that their manager has access to their current itinerary;
- (i) establishing appropriate communication arrangements with their manager;
- (j) managing costs and expenses responsibly and consistently with this policy and the procedures;



- (k) retaining and providing all necessary documentation to support:
 - (i) claims for expenses;
 - (ii) acquittal of advances;
 - (iii) grant reporting; and
 - (iv) audit requirements;
 - (l) making appropriate arrangements for any allocated teaching or other duties that take place during their absence.
- (2) **Travel approvers are responsible for** satisfying themselves that:
- (a) the proposed travel:
 - (i) is being reasonably incurred;
 - (ii) is necessary to meet its intended objectives;
 - (iii) is planned appropriately, including appropriate risk control measures; and
 - (iv) is for appropriate University activities;
 - (b) the traveller;
 - (i) is competent to undertake the travel; and
 - (ii) has established appropriate communications arrangements;
 - (c) there are sufficient funds in the nominated account/s to cover the cost of the travel;
 - (d) the cost to the University is minimised;
 - (e) the duration and timing of the travel is appropriate, given University operational requirements.

16 Administration

- (1) The Chief Financial Officer is the administrator of this policy generally, and the Chief Human Resources Officer is the administrator of clause 8. Formal policy reviews are the responsibility of, and must be initiated by, both jointly.
- (2) The Chief Human Resources Officer, in consultation with the Chief Financial Officer, may determine procedures relating to clause 8 or otherwise in relation to the management of travel risk and safety.
- (3) The Chief Financial Officer may determine procedures relating to all other clauses of this policy.

17 Rescissions and replacements

This document replaces the Travel Policy which commenced on 1 October 2008, and which is rescinded as from the date of commencement of this document.



NOTES

Travel Policy 2018

Date adopted: 11 December 2017
Date amended: 29 February 2020
23 June 2020
Date commenced: 1 January 2018
23 June 2020
Administrator: Chief Financial Officer, Chief Human Resources Officer
Review date: 11 December 2022
Rescinded documents: Travel Policy
Related documents:

University of Sydney (Delegations of Authority) Rule 2020

Code of Conduct – Staff and Affiliates

Student Charter 2020

Environmental Sustainability Policy

Acceptable Use of ICT Resources Policy 2019

Procurement Policy 2019

Special Studies Program Policy 2015

Research Code of Conduct 2013

Workforce Engagements and Payments Policy 2016

Work Health and Safety Policy 2016

Special Studies Program Procedures 2015

Travel Procedures 2018

Non-Allowable Expense Procedures 2018

Fieldwork Safety Standards

Disability Inclusion Action Plan 2019-2024



AMENDMENT HISTORY

Provision	Amendment	Commencing
Various	Minor Administrative Amendments, replace dependent with dependant	18 Jan 2018
4(c)	Subclause added	10 September 2019
6	Definition of fieldwork added. Definition of head of school amended. Definition of temporary worker deleted.	10 September 2019
9(2)(c)	'or temporary workers' deleted.	10 September 2019
14(4); 14(5)	Per diem allowance deleted	29 February 2020
6	Definitions for 'head of administrative area' and 'head of school' amended to align with the new delegations	23 June 2020
10(4)	Amended for delegation change	23 June 2020
10(5)	Deleted for delegation changes	23 June 2020



Schedule One

UNIVERSITY TRAVEL RISK LEVELS

Destination	DFAT Travel Advisory	RiskLine Travel Advisory Risk Levels *	University Risk Levels
Domestic	N/A	Low	Low
International	Exercise normal safety precautions	Low	Low
	Exercise a high degree of caution	Moderate	Medium
		Medium	
	Reconsider your need to travel	High	High
Do not travel	Extreme	Very High	

*Available through the University's online travel and expense management system.