

## EMPLOYEE TRAVEL AND RELATED EXPENSES POLICY

<b>Approval Level:</b>	EMT
<b>Policy Type:</b>	Organisation
<b>Approval Date:</b>	30/05/2022
<b>Review cycle:</b>	Four years
<b>Review Date:</b>	30/05/2026
<b>Responsible Officer:</b>	Manager Financial Strategy
<b>Owner:</b>	Financial Strategy
<b>Responsible Director:</b>	Corporate Performance
<b>Relevant Legislation/Authority:</b>	<i>Local Government Act 2020 (Vic)</i>
<b>DOCSETID:</b>	4712567

### 1. PURPOSE

The purpose of this policy is to provide a structured and transparent framework for staff incurring business travel and related expenses on behalf of the City of Greater Bendigo (the City).

### 2. BACKGROUND

The City recognises the need for employees to travel on City business from time to time. In facilitating employee travel, the City is committed to:

- maintaining its employer duty of care;
- meeting its legal and tax obligations;
- ensuring value for money; and
- reducing the environmental impact of employee travel.

This policy ensures that all travel has an identifiable benefit to the City and the municipal community and that all travel expenses funded by the City are substantiated, reasonable and appropriate.

### 3. SCOPE

This policy applies to all employees engaged by the City and travelling on approved City business. This policy does not apply to Councillors.



#### 4. DEFINITIONS

In this policy:

**Act** means the *Local Government Act 2020* (Vic).

**CEO** means the person holding or acting in the office of Chief Executive Officer of the City.

**City** means the Greater Bendigo City Council, being a body corporate constituted as a municipal Council under the *Local Government Act 2020* (Vic).

**Corporate Purchasing Card** means a credit card procured by the City for business purposes.

**Employee** means a person who receives a salary or wages from the City (employed on either a full-time, part-time or casual basis where the nature of the work is permanent/ongoing or temporary for a specified period).

**Intrastate Travel** means travel within the state of Victoria.

**Interstate Travel** means travel outside the state of Victoria but within Australia.

**International Travel** means travel outside of Australia.

**Traveller** means an employee, volunteer or contractor engaged by the City who is travelling for approved business-related purposes.

#### 5. PRINCIPLES

The following principles form the basis of this policy:

##### 5.1 Community accountability

The City endeavours to provide the best possible service to employees who are travelling on behalf of the City, while ensuring that accountability of public moneys is maintained. The community expects, and the City is committed to, conducting business ethically, displaying diligence, fairness, trust and respect when dealing with others.

##### 5.2 Transparency

The City will conduct business in a transparent, honest and open manner, demonstrating the highest levels of integrity consistent with the public interest.

##### 5.3 Value for money

The City has a responsibility to obtain value for money so all travel arrangements must be administered in the most cost-effective manner taking into consideration potential environmental impacts. This will be achieved by acting in an unbiased and ethical manner and in accordance with community expectations.

## 5.4 Fairness and equity

The City is committed to ensuring that where possible due to travelling for work purposes employees are not financially impacted. However, expenses incurred while travelling must be substantiated, reasonable and appropriate.

This policy is in line with the financial principles outlined in section 101 of the *Local Government Act 2020*.

## 6. POLICY

**6.1** All Travellers required to travel for authorised City business that is related to their role at the City are eligible for payment of reasonable costs in accordance with the *Travel and Related Expenses Procedure*.

### 6.2 Pre-approval of travel

**6.2.1** Pre-approval for any business related travel and reasonable costs must be obtained prior to travel from the Travellers manager. Directors must seek pre-approval from the CEO and the CEO must seek pre-approval from the Mayor.

**6.2.2** In addition to 6.2.1 all Interstate Travel must be pre-approved by the Travellers director.

**6.2.3** In addition to 6.2.1 all International Travel must be pre-approved by the CEO.

### 6.3 Travel arrangements and expenses

**6.3.1** All bookings and travel arrangements must be made in compliance with the *Travel and Related Expenses Procedure*.

**6.3.2** Travellers must complete a daily Travel Diary for all travel greater than five nights duration.

**6.3.3** For Interstate Travel or International Travel, all bookings for travel, accommodation and transport must generally be made through Corporate Travel Management (CTM) which is a provider of travel management solutions to the City under the State Government Travel Services Contract. CTM is also encouraged for Intrastate Travel bookings.

**6.3.4** Where air travel is required, the City will procure the lowest possible airfare giving consideration to availability, ticket flexibility and business requirements.

**6.3.5** When planning for an external meeting, conferences or training/development that may require travel, consideration must be given to alternate and cost-effective technologies where practicable.

**6.3.6** For costs incurred that are not covered by City suppliers, payment should be made by a Corporate Purchasing Card, whenever possible, and must be verified by appropriate documentation, such as receipts.



- 6.3.7** Where a Corporate Purchasing Card is not an available option, Travellers may personally incur the expense and claim an employee reimbursement. In certain limited circumstances cash advances may be available and must be pre-approved by the Travellers manager. Expenses must be verified by appropriate documentation, such as receipts.

## **6.4 Payment/Reimbursement**

- 6.4.1** All requests for payment or reimbursement must be made in compliance with the *Travel and Related Expenses Procedure*, using the associated forms and accompanied by the required documentation.
- 6.4.2** All requests for payment or reimbursement must be approved by the Travellers manager. Directors must obtain approval from the CEO and the CEO must obtain approval from the Mayor.
- 6.4.3** All appropriate taxation information must be recorded correctly and provided with any requests for reimbursement.
- 6.4.4** The City will only pay or reimburse travel expenses that fall within the scope of this policy and are directly related to the Traveller's role at the City. Travel that is not pre-approved and/or is not within the scope of this policy will not be funded by the City.
- 6.4.5** The City will not pay or reimburse the following travel related expenses
- Alcohol without pre-approval from a Director or the CEO.
  - The cost of any road, traffic, parking or public transport infringements or penalties incurred
  - Any private travel
  - Passport application expenses
  - Toiletries
  - Newspaper and magazine purchases
  - Personal travel insurance
  - Hairdressing, barber and beautician services
  - Loss of property (claims for loss of property may be available under the city's travel insurance).

## **7. ROLES AND RESPONSIBILITIES**

- 7.1** All City employees, managers and directors across all directorates are responsible for adhering to and implementing this policy and its associated procedure.
- 7.2** Adherence to this policy will be overseen by the Manager Financial Strategy.
- 7.3** Travellers are responsible for:
- a) incurring only reasonable and appropriate expenses;



- b) exercising practical judgment in deciding on transport and accommodation that best suits their circumstances, taking into account cost effectiveness, risk and effective use of time.
- c) maintaining tax invoices or receipts for all expenses incurred regardless of payment method;
- d) submitting requests for reimbursement with original tax invoices or receipts in a timely manner;
- e) prior to leaving Australia, register the details of their official international travel with DFAT at [www.smartraveller.gov.au](http://www.smartraveller.gov.au)
- f) ensuring they have fully informed their manager and have all aspects of travel and expenses pre-approved; and
- g) alerting their manager of any issues with the operation of this policy.

**7.4** The City's managers are responsible for:

- a) ensuring employees in their unit understand the requirements of this policy;
- b) pre-approval of Intrastate Travel for Travellers in their unit;
- c) reviewing and approving the travel expenses of Travellers in their unit and ensuring there is compliance with this policy and proper documentation supporting the expenses or reimbursement requests.

**7.5** Directors are responsible for pre-approving Interstate Travel for Travellers within their directorate.

**7.6** The CEO is responsible for pre-approving International Travel for all Travellers.

**7.7** The Financial Strategy Unit is responsible for:

- a) processing requests for reimbursement; and
- b) ensuring that requests for reimbursement are accompanied by the required documentation and processed in accordance with this policy.

**8. RELATED DOCUMENTS**

Employees are encouraged to access the related internal documents, which are available on the intranet and/or external resources which are available as per the below:

*Travel and Related Expenses Procedure*  
*Corporate Purchasing Card Policy*  
*Employee Code of Conduct*  
*Fleet Policy*  
*Drivers Licence Policy*



Further information or advice on this policy should be directed to Financial Strategy.

## 9. HUMAN RIGHTS COMPATIBILITY

The implications of this policy have been assessed in accordance with the requirements of the Victorian Charter of Human Rights and Responsibilities.

## 10. ADMINISTRATIVE UPDATES

It is recognised that, from time to time, circumstances may change leading to the need for minor administrative changes to this document. Where an update does not materially alter this, such a change may be made administratively. Examples include a change to the name of a business unit, a change to the name of a Federal or State Government department, and a minor update to legislation which does not have a material impact. However, any change or update which materially alters this document must be made through consultation with the staff Consultative Committee and with the approval of EMT or where required, resolution of Council.

## 11. DOCUMENT HISTORY

<b>Date Approved</b>	<b>Responsible Officer</b>	<b>Unit</b>	<b>Change Type</b>	<b>Version</b>	<b>Next Review Date</b>
<i>May, 2022</i>	<i>NC &amp; AH</i>	<i>Financial Strategy</i>	<i>Develop</i>	<i>1.0</i>	<i>May, 2026</i>