MBS Associate Travel Policy

1. Purpose

Melbourne Business School’s (MBS) Travel Policy is designed to inform and guide MBS Associates in ensuring the safest possible travel options; inform and guide the purchase of travel; and outline the payment/reimbursement of travel expenses when on official School business.

2. Policy Commitment

The Policy is based on the following principles:

- Associates are provided with appropriate levels of safety, convenience and comfort at minimum cost to MBS and MBS’s clients.
- Associates are provided with clear frameworks, individual obligations and compliance requirements which assist in ensuring the safest possible journey.
- Associates are not out of pocket as a result of officially representing the business of MBS, neither should they receive or recover more than is reasonable or incurred.
- MBS and the Associate are required to comply with all legal (taxation) obligations.

3. Objectives

For some projects/programs, clients of MBS may specify variations to this policy e.g. a corporate client of MBS may specify that a specific airline or mode of travel is used. In these cases, additional or alternative guidelines and requirements will be outlined as part of the contract with an Associate. These guidelines and requirements will be detailed on the Associate Contractor Agreement Schedule (Scope of Work or Booking Confirmation) for that project/program, and should be read in conjunction with this policy.

Groups of Associates and/or employees travelling together represents a risk should that travel be cancelled, delayed or not arrive at the destination. Where groups of Associates and/or employees are required to travel, common sense should prevail and where practical they should plan to travel in small enough groups to ensure programs will continue as planned should a travel leg be cancelled, delayed or not arrive at the destination.
4. **Responsibilities**

4.1.1 **Compliance with policy**

Associates who travel on official business on behalf of MBS are responsible for complying with this policy. All MBS travel and associated expenditure is subject to audit. Disregarding or abusing the travel policy may constitute a breach of the Associate Contractor Agreement.

4.1.2 **Approval**

All travel and travel costs incurred by the Associate for transportation, accommodation, meals and incidentals must be pre-approved in writing by MBS. Costs can only be claimed on the presentation of receipts. These must be provided within 14 days of the last date of the project/program.

4.1.3 **Health**

Associates are responsible for ensuring that adequate precautions, (e.g. obtaining immunisations) are adhered to whilst travelling and for advising MBS of emergency contacts for the period of travel.

4.1.4 **Travel documentation**

Associates are responsible for ensuring that they have appropriate visas and other required travel documentation prior to travelling.

4.1.5 **Fees and Charges**

Associates must allow sufficient time to arrive at the airport to avoid:

- Fare loss due to non-appearance
- An agent re-validation fee for flight changes
- Airline fees and agent re-issue fees for changing non-flexible flights
- Incurring unnecessary additional charges for last-minute travel changes

4.1.6 **Changes to Itinerary**

Associates will be provided with their travel itinerary for approval by the Client Services Manager/Account Manager which needs to be confirmed by the Associate within 24 hours of receipt. Once travel is approved, any costs related to changes instigated by MBS will be paid by MBS, and any changes instigated by the Associate will be at the cost of the Associate (unless exceptional circumstances prevail).

4.1.7 **Safe travel**

All Associates have a responsibility under **MBS’s Occupational Health & Safety Policy** to ensure work and travel on or off campus locations is undertaken in a safe manner. Associates travelling overseas must consult the current Department of Foreign Affairs and Trade (DFAT) travel risk advice summary at: [www.smartraveller.gov.au](http://www.smartraveller.gov.au).
Associates must be familiar with local laws and regulations with regards to carrying prescribed drugs, medications and illegal drugs into foreign countries before they depart. Associates must consult the relevant foreign embassy / mission in Australia about local laws and/or regulations to ensure any medicines carried are not considered illegal drugs in those countries. MBS will take no responsibility for actions of Associates where they are in breach of local laws and/or regulations. Refer to www.smartraveller.gov.au/tips/ for further information.

4.2 General Procedures

4.2.1 Procurement of Travel

Travel is to be arranged via the Travel Coordinator (Executive Education, travel@mbs.edu) or by contacting a nominated travel booker (Client Services Manager or Account Manager), as specified in the Associate Contractor Agreement Schedule (Scope of Work or Booking Confirmation).

4.2.2 Process

Associates will be notified of travel requirements by a Client Services Manager or Account Manager, who will provide Associates access to a form to complete their travel detail requirements. Upon return of this form, MBS will make the required bookings and advise the Associate accordingly.

4.2.3 Planned travel

Associates are required to submit travel requests as early as possible and no later than nine days prior to departure to ensure that the best fare prices can be achieved.

4.2.4 Approval

All travel must be approved by the Account Manager or Client Services Manager assigned to the client or program.

4.2.5 Own Travel Arrangements

In specific circumstances Associates may make their own travel arrangements or combine project travel with personal/business travel, in which case the following conditions apply:

- The Associate needs to notify their Client Services Manager or Account Manager of their travel intentions and booking arrangements.
- MBS will only provide reimbursement for the amount of the most direct and reasonable fare to the project destination and the traveller’s home location.
- MBS will provide a quote for this amount and it will then be the traveller’s responsibility to make their own travel arrangements, including travel insurance.
- Reimbursement will only be provided for the actual cost/s to the Associate for which a pre-determined upper limit will be provided in writing by MBS.
- Associates are responsible for the travel arrangements (including tickets, accommodation, insurance) of their partners or other travelling companions.
4.2.6 Exceptions

Exceptions to this policy must be approved by the Chief Operating Officer.

4.3 Travel Costs

All travel arrangements are made by MBS: airline, accommodation and most meals are paid directly. In specific, pre-approved circumstances when Associates make their own travel arrangements, costs can be reimbursed to the individual upon receipt of the appropriate tax invoices/receipts. Tax Invoices for Services rendered and costs incurred must be provided within 14 days of the last date of the project/program.

4.3.1 Air Travel

MBS will procure the most direct and reasonable fare and conditions to the project location and return to the traveller’s home location (or other prior agreed destination), based on the requirements of a particular project. Business Class or Premium Economy will only be considered on the basis of distance flown (over 10 hours) and client agreement to pay Business Class (or Premium Economy) fares.

4.3.2 Ground Transport

Arrangements for interstate ground transport will be provided in writing by MBS.

4.3.3 Accommodation

Accommodation will be booked by MBS based on MBS’s list of preferred hotels with which it has negotiated specific rates. MBS will pay accommodation costs directly or advise the Associate that they need to pay the accommodation and seek reimbursement.

4.3.4 Payment Options / Reimbursement of actual expenses

Individuals may claim reimbursement of reasonable costs incurred upon provision of appropriate tax invoices/receipts. Consistent with the Associate Contractor Agreement Schedule (Scope of Work or Booking Confirmation), Tax Invoices for Services rendered and costs incurred must be provided within 14 days of the last day of the project / program or as specified in the Scope of Work or Booking Confirmation.

4.4 Reasonable Travel Costs

The Australian Tax Office (ATO) provides a taxation determination of reasonable travel allowances, to which MBS will refer to as a guideline for costs. Generally, the ATO middle band rates are the maximum that MBS will cover.

4.5 Travel insurance whilst travelling on MBS Business

When travelling on MBS business, individuals are covered by MBS’s travel insurance while travelling, but only if the trip has been duly authorised via the travel approval process, booked through MBS and only for the days when an Associate is on MBS business. MBS’s travel insurance is provided by ACE Assistance (schedule) and contact details can be viewed by clicking this link: ACE Assistance.
The ACE Assistance help line is available 24/7 from anywhere in the world by contacting the local telephone operator and asking for a reverse call to on:

+61 2 9929 2210 or
+61 2 8907 5595.

5. Related Information

5.1 Definitions

5.1.1 Transportation Costs

Transportation costs include airfares and ground transportation, including, but not limited to, taxis, trains, buses, trams or car rental while on business-related travel. These costs require pre-approval by MBS. Should it be agreed with MBS that an Associate should make their own transportation arrangements, please contact the Client Services Manager or Account Manager for a guide to cost limitations for transportation prior to travelling.

5.1.2 Accommodation Costs

This includes the room cost (including all applicable taxes and fees). Should it be agreed with MBS that the Associate makes their own accommodation arrangements, please contact the Client Services Manager or Account Manager for a guide to reasonable costs for accommodation prior to travelling. The Australian Tax Office (ATO) provides a taxation determination of reasonable accommodation allowances, to which MBS will refer to as a guideline for costs. Generally, the ATO middle band rates are the maximum that MBS will cover.

5.1.3 Meal Costs

This includes breakfast, lunch and dinner. Please contact the Client Services Manager or Account Manager for a guide to reasonable cost for meals prior to travelling. The Australian Tax Office (ATO) provides a taxation determination of reasonable meal allowances, to which MBS will refer to as a guideline for costs. Generally, the ATO middle band rates are the maximum that MBS will cover.

5.1.4 Incidental Costs

Associates are entitled to claim reasonable incidental costs incurred for legitimate business purposes on behalf of MBS. This does not include alcohol, video rental or other costs that are considered entertainment.

5.2 MBS Travel Insurance Policy

5.3 MBS Occupational Health and Safety Policy
6. General Information

Approved by: Executive Committee
Responsible Policy owner: Corporate Services
Contact area: Corporate Services
Commencement date: 1/10/2013
Approval Date: 30/09/2013

7. Review Date

Melbourne Business School Commits to Review this Policy in 30/06/2015
Review Period: Every Two Years

8. Keywords

hire car; accommodation; airfare; travel costs; travel expenses; travel insurance; procurement of travel; travel; transport