



Oakleigh Grammar

Policy Document Name	Travel Policy
Date Ratified by Board Of Management	February 2023
Date for Review	February 2026

1. Preamble

This policy applies to school employees who are involved in school sponsored travel and incur travel related expenses and those responsible for authorising and processing travel arrangements paid for with school funds.

2. Purpose

Oakleigh Grammar recognises the need for travel on official school business and is committed to ensuring that travellers make safe, efficient and cost-effective travel arrangements.

3. Definitions

ATO: Australian Taxation Office.

Traveller: A school staff member travelling either domestically or internationally on School business.

School Business: Activity of a business, educational or professional nature sanctioned by the School.

School Funds: All funds controlled by the School.

4. Policy Statement

The School will implement effective control procedures and guidelines to ensure:

1. Travel expenses paid for by the School are for official business purposes only.
2. All travel is subject to approval from the Principal.
3. Staff travelling on official School business must have prior approval from the Principal. This must be indicated on the Employee Leave Form designated as 'School Business/Travel Leave' and authorised by the Principal.
4. For travel within Victoria necessitated by normal business activities, prior approval is not necessary for the School's Executive
5. Receipts will be required to claim reimbursement of expenses approved by the Principal.

5. Booking of Travel

All air travel must be booked through the Principals Office, unless otherwise stipulated by the Principal.

6. Payment of Approved Travel Expenses

Travel expenses will be paid in advance by the School with approved purchasing methods and subject to official purchasing requirements.

All travellers are responsible for their own safety and are required to undertake a travel risk assessment before travel commences in order to identify and if necessary, mitigate risk.

The School has comprehensive insurance cover in place for all staff travelling on School business. Staff are advised to download a copy of the insurance policy, make themselves aware of the cover it provides and take a copy with them when travelling.

7. Appropriate Class of Travel

The School is committed to the most cost efficient mode of travel. If there is a desire to have a higher cost of travel the cost will be met by the approved applicant.

8. Travel Diaries

Travel diaries must be completed by staff for all travel that requires the employee to be absent from their normal place of residence for 6 or more nights (both domestic and international) or otherwise as required by the ATO.

9. General Principles related to cover of costs:

1. The School will arrange all transport, including transfers from airports, and payment in advance.
2. Conference costs including accommodation.
3. Conference dinners and events designated in conference schedules.
Note: Lunch and dinner not specific to the conference schedule will **not** be covered.
4. Cost for spouse/partner or any family member will **not** be covered.
5. Parking costs, transport to and from at Melbourne Airport will **not** be covered.

10. Process

	Notes	Responsibility
Application	A written application will need to be made to the Executive Principal detailing the planned trip. Wherever possible, this should be before mid-October in the previous year so that a complete budget can be formulated and ratified by the Board at the (late) October Board Meeting.	Applicant
Rationale	<p>The most important part of this process is the rationale for attending an overseas or extended (5 day *) national event.</p> <ol style="list-style-type: none"> 1. The most pertinent question is how does the planned trip resonate with the longer term strategic vision of Oakleigh Grammar. How is the planned trip integral to key goals in the Strategic Vision and current Strategic Plan of Oakleigh Grammar. 2. The second issue to address is whether there are more localised and/or online alternatives which will provide the same outcome for less off site and less financial impost on the organisation. These are both important from a stewardship perspective. 	Applicant
Budget	<p>A planned budget including registration, transport, accommodation and meals needs to be submitted with the application. Where exact amounts are unknown at the time of application, a reasonable estimate will need to be used.</p> <p>In addition, any additional personal travel/meals/accommodation will need to be itemised and paid for from private finances.</p>	Applicant
Approval	Approval needs to be granted in writing before any registrations or bookings are confirmed.	Principal*
Follow Up	After the trip, a report of key findings, outcomes and recommendations will need to be prepared for the relevant leadership team – HCC Exec, RCC PLT, Cabinet or Board depending on the nature of the trip and the leadership role of attendees. Where requested, a formal presentation may be deemed appropriate as well.	Applicant

*With the exception of:

- Unforeseen circumstances where any unbudgeted application needs to be additionally ratified by the Principal. It is recognised that not all suitable events are promoted before the mid-October deadline of the previous year. Discernment will be needed on a case by case basis where a late application is submitted.

11. Direction

That all staff follow this policy.

Oakleigh Grammar Executive Travel Application Form

Event:	
Purpose:	
Dates:	
Rationale:	
Budget:	<p>As far as is practicable, state the following costs in (equivalent) A\$, using current exchange rates were necessary:</p> <ul style="list-style-type: none">• Registration• Transport• Accommodation• Meals• Other• TOTAL <p>Please document any expected additional private expenditure.</p>
Planned Follow Up:	
Approval Process:	<p>Application submitted to:</p> <p>Date of receipt of application:</p> <p>Date approved or declined:</p> <p>Date of notification to applicant:</p> <p>Principal Signature: _____</p>

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