

# NZIQS Travel Policy

V 4 Effective 17 December 2021

## Contents

1. Purpose and Principles
2. Travel Insurance
3. Air Travel
4. Motor Vehicles
5. Accommodation
6. Meals and Entertainment
7. Miscellaneous
8. Expense Claims
9. Further Information
10. Review

## 1. Purpose and Principles

<b>Purpose of this policy</b>	<p>This policy provides guidelines and establishes procedures for the New Zealand Institute of Quantity Surveyor (NZIQS) personnel who incur expenses while travelling on NZIQS business.</p> <p>Personnel refers to all NZIQS staff, Board and Committee members, members, and approved contractors authorised to travel on behalf of NZIQS.</p>
<b>Objectives</b>	<p>The objectives of this policy are:</p> <ul style="list-style-type: none"> <li>• to ensure that personnel are reimbursed for all reasonable travel costs</li> <li>• to ensure that all NZIQS personnel have a clear understanding of policies and procedures for NZIQS travel</li> <li>• to maximise the NZIQS's ability to negotiate discounted travel rates with preferred suppliers</li> </ul>
<b>Stewards of member resources</b>	<p>NZIQS personnel are stewards of members' resources and have an obligation to use those resources prudently.</p> <p>Those who arrange and undertake travel for the NZIQS must make careful and informed decisions for the best use of member funds while meeting the NZIQS's business needs.</p>

<p><b>Principles underpinning this policy</b></p>	<p>The safety and security of individuals travelling on NZIQS business are paramount.</p> <p>Individuals must meet the costs of their private activities during NZIQS travel, but individuals should not be out of pocket due to incurring approved expenses for NZIQS business.</p> <p>Wherever practicable, individuals are expected:</p> <ul style="list-style-type: none"> <li>• to prepare a travel itinerary that requires the least time away from the office</li> <li>• to take the most direct route to the destination for NZIQS business</li> <li>• to use the most cost-effective options</li> </ul>
<p><b>Approvals</b></p>	<p>The Executive Director or Business Manager must authorise all domestic NZIQS travel before any reservations are made.</p> <p>The Board or Finance Committee Chair must authorise international NZIQS travel.</p> <p>The Executive Director must ensure that there are sufficient funds in the appropriate budget to cover the proposed travel costs.</p>
<p><b>Reservations and bookings</b></p>	<p>The Business Manager or Executive Director should make all travel reservations. Wherever practicable, NZIQS travel expenses should be prepaid by, or directly charged to, the NZIQS. NZIQS staff will assist with all travel reservations for NZIQS business, including en-route changes, accommodation, and motor vehicle reservations.</p> <p>Travel arrangements should be made as early as possible to take advantage of lower fares for advance bookings.</p> <p>NZIQS holds a Travelcard account with Air New Zealand. However, other airlines may be booked depending on cost or flight timings.</p>
<p><b>Combining official and personal travel</b></p>	<p>With appropriate managerial approval, individuals may undertake reasonable personal travel and take leave while travelling on official NZIQS business, provided there is no additional cost to the NZIQS.</p> <p>When official and non-official travel is combined, individuals should make arrangements for immediate payment to NZIQS for any non-official travel expenses.</p> <p>NZIQS-negotiated accommodation/transport rates may be used for personal travel.</p> <p>Expenses incurred during any period of personal travel are the individual's responsibility.</p>

<b>Travelling with family members or friends</b>	NZIQS personnel may be accompanied by family or close personal friends while travelling on NZIQS business at the individual's expense.
<b>Frequent flyer programmes and airline club memberships (including air points)</b>	<p>NZIQS personnel may accrue Airpoints and other loyalty scheme points. Frequent flyer numbers should be provided to the Business Manager at the time of booking.</p> <p>NZIQS will pay for an annual Koru Club membership for the Executive Director and Business Manager under their Employment Agreement. Koru Club membership for other employees is on a case by case basis to be agreed upon by the Board</p> <p>The Air New Zealand, Travelcard rewards points may be used to enhance travel for NZIQS personnel, e.g. for upgrades on long-haul flights, Koru membership, or upgraded Frequent Flyer status that benefits NZIQS travel.</p>

## 2. Travel Insurance

<b>NZIQS travel insurance</b>	<p>Personnel undertaking NZIQS travel are covered by the NZIQS Corporate travel insurance policy, which covers domestic and international travel.</p> <p>This policy is comprehensive, and details are available on request from NZIQS Business Manager. Individuals must read the policy and be aware of what is and isn't included in the cover.</p> <p>The insurance cover applies from the time of leaving home or work (whichever occurs last) until arrival back at home or work (whichever occurs first).</p> <p>The NZIQS's insurance policy includes limited cover for:</p> <ul style="list-style-type: none"> <li>• personal accident and injury</li> <li>• lost baggage, business property, money, and travel documents</li> <li>• personal liability (for personal injury caused to any person or for property damage)</li> <li>• excess incurred as a result of collision damage or theft of a hired motor vehicle, and</li> <li>• International medical and emergency dental treatment, including repatriation</li> </ul> <p>Personal items are not covered during periods of domestic travel unless such coverage is part of an approved international travel arrangement.</p> <p>NZIQS will not reimburse individuals for any other travel insurance purchased.</p>
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<b>Cover for a spouse and personal time/leisure</b>	<p>The insurance cover includes any associated leisure travel taken by an individual as part of business-related overseas travel (up to a maximum duration of 42 days).</p> <p>The insurance coverage covers a spouse and dependent children under 19 years who accompany the individual as part of business-related overseas travel.</p>
<b>Travel Guard Emergency travel assistance</b>	<p>The NZIQS Corporate Travel Insurance includes Travel Guard, which offers 24/7 worldwide support for medical, security and travel assistance.</p> <p>Personnel travelling overseas will be issued with the Travel Guard contact details. Travel Guard must be contacted in the event of a medical or another emergency while overseas, and their instructions followed.</p>
<b>Reporting damage, loss, or theft</b>	<p>Damage, loss, or theft of NZIQS-owned or hired assets or covered personal items must be reported to the Business Manager within 48 hours or the next working day after the damage, loss, or theft.</p> <p>These reports should be confirmed in writing on an insurance claim form sent to the Business Manager within 30 days, specifying details of:</p> <ul style="list-style-type: none"> <li>• where and when the incident occurred</li> <li>• the names of the parties involved, and</li> <li>• if possible, an estimate of loss or damage.</li> </ul> <p>A police report may also be required.</p>

### 3. Air Travel

<b>International air travel</b>	<p>The Board will review the need for an upgrade to Premium Economy, Business Class or additional legroom upgrades before any international air travel on a case by case basis.</p> <p>Considerations justifying international premium or business class travel may include:</p> <ul style="list-style-type: none"> <li>• a total flying time inclusive of at least one long haul of more than five hours;</li> <li>• the need to attend official business on the day of arrival after a long flight; or</li> <li>• medical reasons</li> </ul>
<b>Cancellations, missed flights, downgrades</b>	<p>In the following situations, individuals travelling on NZIQS business must seek advice from the NZIQS's support staff as soon as possible:</p> <ul style="list-style-type: none"> <li>• if a flight is missed</li> <li>• if tickets are lost</li> <li>• when travel has been cancelled by the carrier or needs to be cancelled by the individual</li> <li>• when some flight coupons are not used or</li> </ul>

	<ul style="list-style-type: none"> <li>when the carrier downgrades to a lower class of travel than initially ticketed.</li> </ul>
<b>Excess baggage</b>	NZIQS will not reimburse individuals for excess baggage expenses unless they travel with heavy or bulky items necessary for NZIQS business or medical reasons.

## 4. Motor Vehicles

<b>Hiring a motor vehicle</b>	An appropriate motor vehicle may be hired at the NZIQS's expense to meet the NZIQS's business needs. Where practical, all motor vehicle hires should be made through the Business Manager to take advantage of company discounts.
<b>Insuring hired vehicles</b>	<p>The NZIQS Corporate Travel Insurance policy covers rental car excess up to the value of \$5000 hired by individuals for NZIQS business purposes, both domestically and overseas.</p> <p>Individuals who hire a motor vehicle for NZIQS business should decline the Excess reduction fee when booking a rental car.</p>
<b>Accidents</b>	<p>Should an accident occur, the individual concerned should immediately:</p> <ul style="list-style-type: none"> <li>report the incident to the appropriate traffic authorities</li> <li>advise the motor vehicle hire company</li> <li>report the incident to the Business Manager and complete an insurance claim form with a copy of the traffic authorities' report.</li> </ul> <p>If a motor vehicle accident occurs overseas, the individual can seek advice from the emergency assistance service offered by Travel Guard (see Travel Insurance section).</p>
<b>Use of personal vehicle</b>	Use of an appropriate personal motor vehicle for NZIQS business may be used where travel by the car would be more cost-effective or timely than travelling by any other alternative.
<b>Reimbursement for the use of personal vehicle</b>	Individuals who use a personal motor vehicle for NZIQS business may claim a contribution towards running costs from NZIQS, based on the IRD's standard mileage rate.
<b>Parking and traffic infringements</b>	Payment of any parking or traffic infringement fines incurred by an individual, whether using a hired vehicle or an approved personal vehicle, is the responsibility of the individual, not the NZIQS.
<b>Taxis/Uber</b>	Taxis or Ubers can be used for NZIQS travel where costs are not likely to exceed the cost of hiring a motor vehicle.

	<p>NZIQS may issue taxi chits for taxis. Taxi chits must not be used for travelling between home and work unless extenuating circumstances (e.g., the individual is required to work late or attend an NZIQS function) and prior managerial approval has been obtained.</p> <p>Individuals using taxi chits are required to fill in all the details on the chit when the journey is completed and return to NZIQS for reconciliation</p>
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## 5. Accommodation

<b>Selection of accommodation</b>	<p>The NZIQS will pay for reasonable accommodation (in terms of standard and price) used in conjunction with NZIQS travel, taking into account:</p> <ul style="list-style-type: none"> <li>• availability</li> <li>• the nature of the work being undertaken</li> <li>• the proximity of the accommodation to the place of work, and</li> <li>• the safety and security of the individual.</li> </ul>
<b>Personal expenditures associated with accommodation</b>	<p>All personal expenses at the accommodation must be paid by the individual, including In-room movies, videos, spas, snacks and liquor from the mini-bar and the like.</p> <p>These should be paid directly to the accommodation provider when the account is settled and will not be reimbursed by the NZIQS unless the expenses are incurred for NZIQS business purposes.</p>
<b>Staying in private accommodation</b>	<p>Individuals may choose to stay in private accommodation when travelling on NZIQS business. Individuals who choose to stay in private accommodation must seek the Executive Director's approval beforehand.</p> <p>The actual and reasonable costs of the private accommodation, including taking the host to a meal or purchasing groceries/food to contribute to a meal at the host's residence, may be reimbursed by the NZIQS.</p>

## 6. Meals and Entertainment

<b>Meals and alcohol</b>	<p>Meal expenses claimed during NZIQS travel must be actual and reasonable.</p> <p>In general, expenditure for alcohol during NZIQS travel is a personal charge, not reimbursable by the NZIQS. Where alcohol is required to host an event, such as Board /committee meeting, member functions, then the cost should be reasonable and appropriate for the occasion.</p>
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	It is recognised that hospitality requiring meals and alcohol may be required for official entertaining, particularly during overseas travel or when hosting guests.
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## 7. Miscellaneous expenses

<b>Telephone, fax, and email</b>	<p>The NZIQS will cover reasonable charges incurred for NZIQS business-related telephone, fax, Internet usage, and email during NZIQS travel.</p> <p>Personal phone calls home will be reimbursed, provided the frequency and duration of such calls are not unreasonable.</p>
<b>Laundry</b>	The NZIQS will cover reasonable laundry costs, including pressing and dry-cleaning, incurred while undertaking NZIQS overseas travel of 7 nights or more.
<b>Other costs</b>	The Executive Director or Board may exercise discretion to approve reimbursement of any other reasonable costs incurred by individuals due to undertaking NZIQS travel, consistent with the principles of this policy.

## 8. Expense Claims

<b>Actual and reasonable expenses</b>	<p>The NZIQS will reimburse expenses incurred for NZIQS travel on an “actual and reasonable” basis.</p> <p>Claimants’ bills or invoices for NZIQS travel expenses must delineate between official and personal travel expenses. Personal travel and related expenses must not be charged to the NZIQS.</p>
<b>Staff Claims</b>	Staff are expected to use their NZIQS issued credit card for travel-related expenses. Where this is impractical (i.e. credit card not accepted), staff should complete an Expense Claim Form for small items such as parking fees or mileage.
<b>Expense Claim forms</b>	<p>All claims for NZIQS travel expenses must be made using the <a href="#">NZIQS Expense Claim form</a>. Claim forms should be fully completed and submitted to the Business Manager no later than two weeks after return from NZIQS travel.</p> <p>The Executive Director must sign expense Claim forms. The Business Manager should countersign the Executive Director’s Expense Claim to confirm all receipts have been sighted.</p>
<b>Receipts or other evidence</b>	Claim forms for expenses associated with NZIQS travel must be accompanied by receipts or other appropriate forms of evidence. Credit

	<p>Card slips and other receipts that do not give details of purchases are not acceptable.</p> <p>Expenses over \$50 require a Tax Receipt/Invoice.</p> <p>If no receipt is available, the claimant should note this on the Expense Claim form and certify the claim is legitimate.</p>
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## 9. Further information

<b>Forms</b>	Expense Claim Form
<b>Contact</b>	<p>Any questions, concerns or suggestions regarding this travel policy may be directed to the Executive Director: <a href="mailto:marilyn.moffatt@nziqs.co.nz">marilyn.moffatt@nziqs.co.nz</a></p> <p>Any queries relating to travel bookings or claims should be directed to the Accounts Manager <a href="mailto:accounts@nziqs.co.nz">accounts@nziqs.co.nz</a></p> <p>Tel: 08004 NZIQS or 04 4735521</p>

## 10. Review

<u>Version Control</u>	<u>Reviewed</u>	<u>Board Approved</u>
Version 1.0	September 2017	21 September 2017
Version 2.0	February 2018	14 February 2018
Version 3.0	October 2019	17 October 2019
Version 4.0	December 2021	17 December 2021