



# ROTARY AUSTRALIA WORLD COMMUNITY SERVICE LIMITED

# TRAVEL POLICY

# Rotary Australia World Community Service Limited Travel Policy

Index	page
1. INTRODUCTION .....	3
2. SCOPE .....	3
3. ABBREVIATIONS.....	4
3.1 Best Fare of the Day .....	4
3.2 Volunteer .....	4
3.3 Project Volunteer .....	4
4. TRAVEL INSURANCE.....	4
5. PROCEDURE.....	5
5.1 General.....	5
5.2 Documentation .....	5
5.3 Expense Reimbursements.....	5
5.4 Recovering Expenses.....	6
5.5 Air Travel .....	6
5.6 Passport and Visa .....	7
5.7 Health Requirements (International Travel .....	7
5.8 Personal Travel Arrangements.....	7
5.9 Motor Vehicles .....	8
5.7.1 Car Hire Insurance .....	8
5.7.2 Taxis and Other Transportation .....	8
5.10 Accommodation.....	8
5.11 Loss of Property .....	8
5.12 Travel Security and Emergency Situations .....	9
5.13 Trip Outcomes Form .....	9
5.14 Non-Compliance .....	9
6. DOCUMENTATION	
6.1 Expense Reimbursement Form (AA/1) .....	10
6.2 Trip Outcomes Form (AA/2) .....	11/12

## **1. INTRODUCTION**

RAWCS recognises that travel is often an integral part of RAWCS related activities for some people, be it administration or project volunteer.

No Rotarian should be placed in the situation where their personal financial position prevents such service to Rotary. Equally, we are conscious that RAWCS has very limited income to fund its administration costs or project volunteer expenses.

This travel policy is to assist Rotarians by providing guidance and a framework for making a travel claim for reimbursement.

Furthermore, RAWCS acknowledges the willingness of volunteers to devote their time to traveling and staying in different, sometimes remote locations. It is the policy of RAWCS to provide safe, accountable, timely, reasonable and cost-effective travel arrangements for volunteers where travel is required to undertake the responsibilities of their role.

This policy is designed to communicate organisational expectations relating to travel and to protect and safeguard volunteers while they travel on approved organisational business.

RAWCS intends to maximise financial savings by requiring volunteers to obtain the best value for money for their travel.

The RAWCS Board of Directors requires the National Treasurer and the Regional Treasures to provide detailed annual budgets of administration expenditure, the total cost which cannot exceed the RAWCs projected total income. The approved budgets then become the authority to fund actual administration costs during the financial year. Any adhoc unbudgeted administration expenditure has to be approved by the RAWCS Executive / RAWCS Board prior to being incurred.

All travel arrangements must be approved by the Regional Chair or National Chair prior to incurring the expenditure, checked by the Regional Treasurer / National Treasurer as an item budget, and are then booked by the person traveling or the team leader in the case of Project Volunteers.

## **2. SCOPE**

All RAWCS volunteers who incur travel expenses on RAWCS business are responsible for complying with this procedure.

### **3. ABBREVIATIONS**

#### **3.1 Best Fare of the Day**

##### **3.1.1 Domestic**

This is the lowest priced fare that is +/- one hour of the requested travel time, regardless of carrier. Travelers requiring flexible/changeable flights shall book 'flexi-saver' type or equivalent fares, where approved.

##### **3.1.2 International**

This is the lowest priced fare that is +/- 12 hours of the requested travel time, regardless of carrier.

#### **3.2 Volunteer**

A person travelling for the purposes of an approved RAWCS activity.

#### **3.3 Project Volunteer**

A person volunteering for a RAWCS approved Project.

### **4. TRAVEL INSURANCE**

While on RAWCS business, Volunteers are covered by Rotary's Insurance Policy. The insurance coverage is subject to the Policy's conditions and exclusions, including loss or damage to baggage and overseas medical expenses.

Weekends that fall between periods of approved travel will normally be covered by the organisation's insurance. However, the policy does not provide coverage for a number of high-risk recreational activities and although the exclusion for pre-existing health conditions has been waived, there is still a requirement for the insured Project Volunteer with a pre-existing health condition to obtain approval from their doctor advising they are fit to travel.

The Rotary travel policy covers members of Rotary including spouses (and defactos and partners) participating in Rotary activities provided such travel involves destination 50 kilometers or more from the Insured Persons normal place of business or residence.

The travel policy limits any travel taken in relation to Rotary business including and private travel by an insured Project Volunteer to ninety days. Volunteers engaged on a daily basis overseas on RAWCS activities are covered in the same way that they are within Australia. Volunteers are expected to observe the same duty of care to themselves and others, as they are required to do within their own State within Australia.

Volunteers travelling overseas should obtain from their District Insurance Officer before leaving, the details of the telephone hotline in case of an emergency. The insurance cover for accidental death cover can vary from year to year. The District Insurance Officer can advise of the current year cover.

## **5. PROCEDURES**

### **5.1 General**

This procedure is to be used for all RAWCS travel and includes, but is not limited to:

- a) representation of RAWCS in an official capacity;
- b) attendance at a conference or seminar in a field relevant to and in line with organisational objectives;
- c) participation in a RAWCS event;
- d) management, coordination, consultation, or work with colleagues on program or project development/delivery; and project travel;
- e) project travel;
- f) provide maximum convenience, flexibility and safety for volunteers traveling on RAWCS business;
- g) ensuring the consistent and fair treatment of all volunteers traveling on RAWCS business;
- h) ensuring clear and consistent understanding of the Travel Policy and associated guidelines;
- i) ensuring all travel undertaken adheres to the Travel Procedures and associated guidelines;
- j) maximizing travel funds to enable the organisation to better manage its annual travel budget;
- k) ensuring that the travel is necessary and linked to the attainment of organisational objectives.

### **5.2 Documentation**

Volunteers are responsible for ensuring that they complete and maintain all documentation with regard to travel arrangements and all supporting documentation for travel expenses.

### **5.3 Expense Reimbursements**

It is the responsibility of the all RAWCS Volunteers who incur travel expenses on RAWCS business to comply with this travel policy. It is also the responsibility of the Regional chairperson to ensure that Regional committee members comply with this policy.

- RAWCS will reimburse all reasonable and necessary expenses for Volunteers traveling on authorised RAWCS business, other than the costs associated with travel by Project Volunteers, on presentation of the correct documentation, including the relevant tax invoice/s for the actual travel cost that is claimed.
- Volunteers cannot approve their own expenditure and must obtain Regional / National Chair approval for travel and payment of any allowances.

- Travel must be deemed necessary with the National Executive or the Regional Chairman in the case of Inter-Regional travel agreeing on the specific purpose and goals of the trip prior to making travel arrangements.
- Volunteers :
  - a) Submitting expenses not in compliance with this policy risk delayed partial or forfeited reimbursement;
  - b) Traveling internationally are required to follow medical/health requirements and advice as outlined in the Project Volunteer Handbook and Volunteer Application Form;
  - c) Are required to –
    - 1) dress in an appropriate manner consistent with the requirements of the country and place being visited;
    - 2) behave in a manner that is respectful and consistent with the cultural expectations of the country;
    - 3) consider the Occupational Health & Safety implications of lengthy or arduous travel.
- In order to claim travel expenses, volunteers must complete an Expense Reimbursement Claim Form (Travel Form No AA1). Accurate records of all expenditure incurred must be kept together with receipts and attached to any claims for business travel. It is the responsibility of the Volunteer to keep accurate records of all expenditure incurred and supporting receipts.
- When a receipt is not available, full explanations of the expense and the reason for the missing receipt are required.
- The completed and signed Form (with receipts and other relevant information) is to be sent to the National Treasurer or in the case of inter-Regional travel to the Regional Treasurer.

#### **5.4 Recovering expenses**

It is the responsibility of the RAWCS Volunteer who incurs travel expenses on RAWCS business, to comply with this travel reimbursement procedure.

Volunteers who incur expenditure or commit the organisation to future expenditure that is not in accordance with this Procedure risk having their reimbursement delayed, only partially paid or forfeited.

Incorrect or incomplete Expense Reimbursement Claim Forms will be returned to the Volunteer for completion and may result in a delay or non-reimbursement of specific items.

#### **5.5 Air Travel**

Volunteers are expected to obtain the “Best Fare of the Day” available at the time of booking, taking into consideration the destination/s, time spent traveling and transit time. Some fares may have certain conditions and restrictions attached to them, so volunteers should familiarise themselves with the various

conditions and fare types before confirming a booking. Travel during emergency response is excluded from this Policy.

Volunteers will travel on the most direct route using normal economy class, Best Fare of the Day air travel, unless otherwise approved.

The Volunteer may choose to travel on their preferred carrier or route or class by paying the difference between the “Best Fare of the Day” and the preferred flight.

RAWCS requires all Volunteers to contain costs wherever practical and utilise the best available fare for the journey to be undertaken on safe, reliable carriers.

#### **5.5.1 Business Lounge Membership**

RAWCS does not pay for membership of airline lounges.

#### **5.5.2 Loyalty Programs**

Volunteers may participate in Loyalty Programs and all benefits accrued under such schemes may be retained for use by the volunteer. Any costs associated with Loyalty Programs are to be borne by the traveler and will not be reimbursed by RAWCS.

#### **5.5.3 Excess Baggage**

RAWCS will not cover any costs associated with excess personal baggage.

### **5.6 Passport and Visa**

It is the responsibility of the Volunteer to ensure that they possess a valid passport (a minimum validity of six months at all times) and correct visas and are compliant with any other relevant immigration requirements before embarking on official travel.

Volunteers must ensure that the name provided for the booking is the one shown on the passport that will be used for the travel.

### **5.7 Health Requirements (International Travel)**

For international travel, volunteers are responsible for ensuring that they have the required vaccinations and medications when traveling.

### **5.8 Personal Travel Arrangements**

Any personal travel undertaken in conjunction with RAWCS' travel must be notified in advance and any travel in excess of the RAWCS component of the travel is borne by the volunteer including food, accommodation and travel costs.

#### **5.8.1 Spouse, Partner and Dependent Travel**

Volunteers are to notify the RAWCS Board or the RAWCS National Project Volunteer Coordinator prior to travel where a spouse, partner and/or dependent is accompanying them on official RAWCS travel. Volunteers are to ensure that when accompanied by a spouse, partner or dependent, the business of RAWCS is not compromised. RAWCS will not fund any cost incurred for an accompanying spouse, partner or dependent.

## **5.9 Motor Vehicles**

Private motor vehicle travel will only be reimbursed where travel to the destination exceeds 100 kilometres.

The driver should carry a valid current driver's license.

The reimbursement rate of cents per kilometre is to be determined from time to time, by the National Executive, currently 35 cents per kilometer [July 2018], but check with National Administrator actual rate prior to travel.

### **5.9.1 Car Hire Insurance**

Volunteers should rent a vehicle only when it is determined to be more expeditious or less expensive than using public transportation. Shuttle buses to **hotels should be utilised whenever possible.**

**Rotary Insurance** does not provide cover for damage or loss of rental motor vehicles. Volunteers are therefore responsible for ensuring adequate insurance against damage and third-party liability at the time of vehicle rental, both within Australia and overseas. The no damage waiver is required. Misuse of the vehicle or use outside the terms and conditions of the rental agreement may result in personal liability.

### **5.9.2 Taxis and Other Transportation**

Wherever possible, arrangements should be made at the destination for pickups and transportation. Public transport, taxis and hire cars (where applicable) are the next preferred option. Other modes of transportation e.g. motorbikes, should not be used.

## **5.10 Accommodation**

### **5.10.1 General Conditions**

Domestic and international accommodation is to be booked by the Volunteer having regard to the Volunteer's business requirements.

Standard rooms will be booked. Upon check-in and check-out Volunteers are required to confirm that the nightly rate is correct.

Volunteers staying with family/friends, are not entitled to reimbursement for lodging or meals that do not represent out of pocket expenses for the volunteer.

### **5.10.2 Cancellations**

Cancellation of booked accommodation must be made by the Volunteer as soon as possible. Failure to cancel accommodation bookings can incur a "no-show" fee, which is the cost of one night's accommodation.

## **5.11 LOSS OF PROPERTY**

When traveling on authorised business, the Volunteer is responsible for exercising reasonable care to protect both the organisation's property and their own personal property. Rotary's insurance will assist in replacing lost or stolen property if the volunteer has taken such care. (Claims are to be made through the District Insurance Officer). If losses occur, the Volunteer must report to local police the loss ensuring a copy or traceable document is received as confirmation.



## **5.12 TRAVEL SECURITY AND EMERGENCY SITUATIONS**

RAWCS has a duty of care for the health, safety and wellbeing of all persons traveling on authorised business. All Volunteers traveling internationally must read and be familiar with the Project Volunteer's handbook in conjunction with this Procedure.

Travel to Medium, High or Extreme Risk Countries must be authorised by the RAWCS National Executive or the RAWCS National Project Volunteer Coordinator.

## **5.13 TRIP OUTCOMES FORM**

Volunteers are required to complete a Trip Outcomes Form (Form AA.2) for any international travel.

## **5.14 NON-COMPLIANCE**

Violations or non-compliance with this procedure may result in travel not being reimbursed.

## **6. DOCUMENTATION**

6.1 Expense Reimbursement Form (AA/1)

6.2 Trip Outcomes Form (AA/2)

**ROTARY AUSTRALIA WORLD COMMUNITY SERVICE LIMITED**  
**VOLUNTEERS - TRAVEL EXPENSE CLAIM**

Form AA1

Name of Claimant : \_\_\_\_\_ Travel approved by (name): \_\_\_\_\_

Date		Travel Costs		Accommodation and Meals Costs				Other Expenses	Total Expenses	
Month	Date	From	To	Room	Dinner	Lunch	B'fast	Details	Foreign Curr.	A\$
<b>Total of Expenses paid in A\$</b>										\$
<b>Total of Expenses paid in Foreign Currency</b>										
<b>Foreign Currency converted to A\$ using Exchange Rate of</b>										\$
<b>Total Amount for Reimbursement</b>										\$

All expenses are certified correct – Signed by Claimant \_\_\_\_\_ Date \_\_\_\_\_

Bank details for Reimbursement – Account Name \_\_\_\_\_ BSB \_\_\_\_\_ Account No \_\_\_\_\_

*The Completed Form with receipts is to be sent to the National Treasurer, or for inter-Regional Travel to the Regional Treasurer*

Approved for payment by RAWCS Ltd \_\_\_\_\_ Date \_\_\_\_\_



**Rotary Australia World Community Service Limited**  
**Travel Outcome Report**

Form AA2

Dates of Travel :..... to .....

Purpose of Travel :.....

.....

.....

**TRAVEL DETAILS**

List any difficulties that may have been experienced in travel to or from tile site.

1) Air : .....

2) Land :.....

3) Other : .....

Any recommendation as to how these difficulties could be minimised or eliminated for future arrangements.

.....

Name and Address of Accommodation : .....

.....

<b>Accommodation Category</b>	<b>Good</b>	<b>Satisfactory</b>	<b>* Inadequate</b>
1 Sleeping Arrangements			
2 Washing Facilities			
3 Food			
4 Insect Proofing			
5 Transit Accommodation			
6			
7			

\*Please add any accommodation categories if additional comments should be made.

\*If any of the above categories were considered to be "inadequate", detail the reasons for this assessment and suggest possible improvements which should be made before others are formed for this project.

Outcomes / achievements of travel : .....

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Any additional comment: .....

.....  
.....

Name of Person completing this form: .....

Email Address: .....

Date: ...../...../.....