

### Planning and Monitoring Overseas Travel

It is essential that planning and monitoring of overseas travel is controlled efficiently. To ensure overseas travel is able to be assessed against the full set of criteria associated with good management, there are some important prerequisites to be undertaken.

Groups should make a local provision for detailed planning and monitoring of overseas travel. In view of the difficulties experienced with Group budgets, they must be approved by the Executive Board, and it is requested that quarterly reporting of expenditure will be required through the Finance Committee.

The company has a requirement that full criteria associated with justification for travel are considered in the process of approval by approving officers.

#### Criteria

The staff member travelling and the authorising staff member must ensure that the proposed travel must meet efficiency and effectiveness principles, the purpose and expected outcomes must align with programme objectives; and that any private component is based on whether it is clearly secondary to the purpose of travelling.

It is the responsibility of the officer travelling to ensure that following approval of the formal application, but prior to travel, the final itinerary is approved (including rest days) and that any variations during the course of travel are approved on return.

In view of the difficulties involved, when returning from travel, a short written report must be provided to the relevant Executive Director identifying the outcomes.

### Monitoring and Applying for Overseas Travel

**Budgeting** All groups must ensure they plan for overseas travel in their annual budget. Group budgets must be approved by the Executive Board.

**Monitoring** Groups may decide how overseas travel is monitored. However, standard reports on expenditure must be submitted to the Finance Committee each quarter. Refer to Chapter Y, "Group Reports" for more information.

**Approval criteria** Officers can approve travel when it meets all the following criteria:

- The proposed travel must meet efficiency and effectiveness principles (see Chapter X for a description of these principles).
- Any private component must clearly be secondary to the purpose of the travel.
- The cost for the travel must fit within the budget.

**Application process** The process for applying for overseas travel is described in the table below.

Stage	Description
<b>Before the travel</b>	
<b>1</b>	The officer applying for travel completes the XYZ application and includes: <ul style="list-style-type: none"> <li>• the departmental or organisational programme it relates to,</li> <li>• the purpose and expected outcomes that support the objectives of the programme, and</li> <li>• any private component.</li> </ul>
<b>2</b>	The applying officer's manager and the Director approve the application, taking into account approval criteria (see "Approval criteria" above).
<b>3</b>	The applying officer submits the final itinerary (including rest days) to their manager for approval.
<b>After the travel</b>	
<b>4</b>	The officer who applied must provide details of any itinerary variations upon their return.
<b>5</b>	The officer must prepare a short written report on the trip for the Director identifying the outcomes.