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Code Version Control and History: IUCN Travel Policy and Procedures

Title	IUCN Travel Policy and Procedures
Version	Version 2.1
Source language	English
Published in French under the title	<i>IUCN Politique et procédures de voyages (outstanding)</i>
Published in Spanish under the title	<i>IUCN Políticas y Procedimientos de Viaje (outstanding)</i>
Responsible Unit	Global Finance and Human Resources Management Group
Developed by	Global Finance and Human Resources Management Group
Subject (Taxonomy)	Duty Travel, Mission, Per Diem, Daily Subsistence Allowance (DSA)
Date approved	5 th April 2019
Approved by	Chief Financial Officer
Applicable to	All IUCN Staff
Purpose	The aim of the policy is to provide guidance to staff members when on duty travel.
Is part of	IUCN Internal Control Policy Framework
Related Documents	Travel Authorization Form Expense Claim
Distribution	Sent to all staff members world-wide, available on the IUCN Union Portal (intranet).

Document History

Version 1.0	Released May 2008
Version 2.0	Released 3 June 2015
Version 2.1	Released April 2019

For further information contact:

Local Human Resource or Finance Focal Points

This policy applies to duty travel irrespective of the funding source and irrespective of donors' own rules. In the event that certain costs are allowed by this policy but not by the donor funding the travel, the disallowed costs should be charged against other funding sources.

8. Variations

Some aspects of this Policy and Procedure need to be adapted and further specified to meet local/regional circumstances, for example details of authorised travel agents, permissibility of direct online bookings, use of taxis vs use of own car and airport parking, rates for use of private vehicle.

Such variations to the policy and procedures or additional rules and explanations are to be detailed in the template. 0. inM-1.1()TCsh(l)3.1(e.)-1MCID 5 >>a13(v)-8.1(eh)3.1(c).3(at)-1.1h[f b.1(f)-13.1(7)TJ Os)-8.1(f.12.[ff

- d) **Flexibility** – where travel dates are likely to change, e.g. as a result of changes to meeting dates, the ticket purchased should have the possibility of being changed without significant extra cost being incurred.
- e) **Health and safety** – the time of arrival and departure, the reputation of an airline, and other health and safety factors should be taken into consideration, particularly in countries where security risk is high.

The above are in not in order of importance. The importance of each is left to the traveller's and manager's discretion.

Class of Travel

All travel must be by economy class, with the following exceptions:

- a) Economy plus/premium class¹ is allowed for total flying time of over 8 hours
- b) Business class is allowed only if:
 - i. The person travelling has provided Human Resources with a valid medical certificate, issued by the relevant specialist, advising that the employee must travel in business class. In such cases the medical certificate should be renewed every six months. IUCN reserves the right to refer the person to an IUCN nominated doctor for confirmation of the validity of a medical certificate issued by the person's own doctor.
 - ii. There are exceptional reasons as to why business class travel is required. For example, i02.9(C Tc 0)-4.

Each traveller should endeavour to use public transportation whenever possible. If public transportation is not available, unsafe, or results in inefficient use of staff time, taxi fares incurred using regular taxis will be reimbursed. See Annex 1 for further guidance.

2.4. Car rental

Car rental may be authorized by the traveller's line manager prior to travel, if the trip or the location to be visited is such that the use of local public transportation or taxis is not feasible. Travellers should ensure that the car is rented from a cost-effective provider, prioritizing safety, security, and fuel efficiency. The rental contract must include fully comprehensive insurance for the driver of the car. IUCN will cover the costs of car insurance and 3rd party drivers, where applicable. Cars should only be rented for the duration of work-related travel. Car rental is limited to small or medium sized cars unless the vehicle is to be shared by 3 or more people in which case other cost-effective options should be considered. Drivers are responsible for ensuring they have a valid driving licence.

2.5. Private car

The use of private car is allowed if the trip or the location to be visited is such that the use of local public transportation is not practical and the use of a taxi would not be cost effective. Reimbursement is calculated on the basis of kilometres travelled using the most practical direct route. A rate per kilometre is established by each IUCN office. The rate, which is reviewed and updated periodically, depends on local costs (fuel, insurance, maintenance, depreciation etc.).

Reimbursement for the use of a private car to take a traveller to the airport, station etc. is allowed up to a maximum amount agreed by each office.

Rates and maximum amounts are location specific and are shown in Annex 1.

2.6. IUCN-owned vehicles

IUCN vehicles may be used for work-related travel where such use is economical compared to other forms of transport, or as a result of security considerations.

2.7. Parking

Airport parking will be reimbursed up to a maximum defined by each local office (Annex 1).

3. Accommodation

In situations where meals are included with the cost of the hotel, or are provided during flights, or are provided through other means, e.g. workshops, meetings, representation by other parties, the amount of DSA claimed should be reduced on the basis of the following scale:

Breakfast	20%
Lunch	30%
Dinner	40%
Ancillary costs	10%

For the day of departure and day of return, the portion of the DSA before the time of departure or after the time of return may not be claimed. For example, if the time of departure is after breakfast but before lunch, then the 20% of DSA for breakfast may not be claimed for that day. Meals after the time of departure or before the time of return may be claimed on those days, unless they are included in the cost of the flight ticket or otherwise provided without additional payment.

Ancillary costs

The following ancillary costs are covered by the DSA. This means they will not be reimbursed separately:

- Personal communication costs
- Cost of currency conversions
- Gratuities/tips
- Snacks and refreshments

5. Other costs

The following other costs will be reimbursed for IUCN staff on an actual basis provided they are supported by receipts:

5.1. Laundry

Reasonable laundry expenses will be reimbursed. Laundry costs will not normally be reimbursed for overnight stays of 3 nights or less, unless supported by a justifiable explanation.

5.2. Bank charges

Personal travel may be added to work-related travel with the agreement of an individual's line manager. In such cases the incremental cost of any personal travel must be borne by the individual. The incremental cost should be evidenced by submitting quotations with and without the personal travel.

In instances where the primary objective of travel is personal travel, but the person chooses to add on a work-related visit, the allowable costs are the incremental costs of the work-related trip. IUCN's Global Travel Insurance will only cover the staff member for a personal trip linked to duty travel if they stay in the city where their work will be conducted. If not, individual insurance should be contracted.

III. Procedures

1. Prior to Travel

1.1. Planning and Budget

All duty travel should be planned well in advance of the date of travel and authorized by the traveller's line manager. Advance planning and booking of airline tickets will result in the most competitive prices being secured. In the event that travel dates are likely to change, flexibility can be obtained by buying tickets which include options for change or cancellation. This approach is likely to be more cost effective than buying tickets at the "last minute".

Duty travel will only be authorized if funds are available within the appropriate budget and travel is a necessary component of the persons approved work plan or terms of reference.

A Statement of Travel Objectives (STO) should be completed prior to travel and attached to the Travel Authorisation prior to approval³. This can be found on the Union Portal at:

<https://portals.iucn.org/union/node/26515>

1.2. Authorization

All travellers must complete a Travel Authorization (TA), either through the ERP or manually for those offices not using the ERP travel portal, detailing the itinerary and estimated costs. The TA must be approved b-8(t)-1.4 -1.(or)-6.3(t)-1.2(o a)-12.2(ppr)-rkusly mofllkavem-8(t)-ar -0.Tm's1(be))TJ 0.098 31(h)-21(y)16

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Travellers may organise their own travel or use administrative support staff depending on normal office arrangements.

Where credit cards are used to purchase tickets on-line (subject to the above restrictions on direct bookings), a printout of the payment details from the internet must be provided to support the expense claim.

2. After Travel