



Operations Travel and Conference Attendance Policy

Date Policy took effect October 2020

Responsible Officer Chief Operating Officer

Last Reviewed

Review date October 2025

Purpose

The purpose of this policy is to define the criteria, application and approval process for all travel and conference attendance within the Operations Group of Divisions.

Organisational Scope

The policy applies to all Departments and work groups of the Divisions of the Operations Group i.e. Campus and Collegiate Life Services, Campus Development, Enabling Excellence, Health & Safety Compliance, Information Technology Services, Project Management Office, Property Services, Shared Services, Office of Sustainability and the Office of Risk, Assurance and Compliance.

This policy applies to all travel where flights are booked (domestically and internationally) for work-related business, attendance at conferences, workshops, seminars and meetings.

Content

Summary:

Any member of staff or contractors wanting to travel for business purposes and/or attend a conference must obtain approval by completing the *Operations Travel and/or Conference Approval Form*, online through the OURDrive portal. The approved period of leave will normally be for the duration of the work-related business, or period of attendance at the conference, together with the minimal reasonable period for travel to and from the University. Any leave in excess of this minimum will normally be taken as annual leave.

All air travel should be booked in accordance with the University's [Travel Planning Procedures](#) and Travel and Travel Related Costs Policy.

Travel and accommodation expenditure should be economical and efficient, having regard to purpose, distance, time, urgency, personal health, security and safety considerations. The principles of a justified business purpose, and moderate and conservative expenditure, are particularly relevant.

Travel must be re-approved prior to departure if changes are made to itineraries which increase the originally approved cost of travel.

Approval Process:

Applications for travel and/or conference attendance must be made before any flights or travel expenses are booked. Applications must be made using the *Operations Travel and/or Conference Approval* online form, which must include details of:

For domestic or international travel for business purposes:

- The location of meeting, site visit, business being undertaken.
- Date/s of absence.
- Purpose and justification for travel.
- Itinerary detail if visiting multiple locations and groups.
- Estimate of flights, accommodation, and travel costs.

For domestic or international conference attendance and travel:

- The name and venue of conference.
- Dates of absence.
- Purpose of attendance at the conference.
- How the applicant intends to utilise and share learnings from the conference or course.
- Estimate of flights, accommodation, registration, and travel costs.

Required Approvals:

Attendance and funding for all **domestic travel** (where flights are booked), **international travel** and **conference attendance** must be approved by Divisional Heads and the Chief Operating Officer, on the recommendation of the staff member's line manager.

Attendance and funding for all travel and conference attendance for Directors within the Operations Group of Divisions, will be approved by the Chief Operating Officer.

Required Criteria:

1. Does attendance at the conference align to the Operations Group Strategic Priority Plan?
2. Has the staff member attending achieved a suitable PDR outcome? A minimum of 'meeting expectations' and preferably 'exceeding expectations' is required.
3. Has attendance at this conference been identified within the staff member's PDR/Professional Development Planning for the coming year?

Additional Guidelines:

1. As a general rule, only one staff member from an Operations Division or department should attend the same conference.
2. Attendance at a conference (unless speaking or presenting) should be limited to once annually.
3. Prior to conference attendance, the manager and staff member attending should agree to a set of expectations (these might include the following):
 - An agreed set of learning outcomes/reasons for attendance.
 - Any specific connections/relationships/information/compliance or regulatory elements that are to be sought.
4. Post-conference, the staff member who attended will lead a structured 'teach- back' session with their team to share learnings from the conference and explore and encourage wider opportunities to share this learning in the Operations Group.

Related Policies, Procedures and Forms

University Travel and Travel Related Costs Policy
<http://www.otago.ac.nz/administration/policies/otago025562.html>

Contact for further information about this Policy

If you have any queries regarding the content of this policy or need further clarification, contact the Chief Operating Officer at coo@otago.ac.nz

Implementation Process

Person responsible	Managers and Directors of each Division.
Communication strategy	Policy to be sent to Directors and Senior Management Teams of Divisions within Operations. Managers to disseminate the policy to their departments.