



Travel Policy and Procedures

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Approved by	Chief Financial Officer
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For further information contact:

Local Human Resource or Finance Focal Points

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I. Purpose and Principles

1. Purpose

The purpose of the IUCN Travel Policy and Procedures is to provide guidance to IUCN staff when undertaking travel on behalf of IUCN and to ensure that IUCN implements its 'duty of care' to all staff who need to travel as part of their IUCN role. The policy encourages environmental accountability, cost effectiveness and fiscal responsibility, a fair and sustainable work-life balance, and that health, safety, and security concerns are met.

The policy covers work-related travel and individual travel entitlements provided for under contracts of employment, e.g. home leave for expatriate staff.

2. Requirement to travel

Travel should only be undertaken when necessary. Travel must contribute to the mission and objectives of IUCN and should not be undertaken if the same results could be achieved through other cost effective means.

All line managers have the responsibility to carefully consider the need for requested travel and to consider alternatives such as using video or teleconferencing, combining trips and meetings, and reducing the overall number of attendees at any one meeting or event.

3. Environmental accountability

IUCN is committed to being an environmentally responsible and accountable organization and actively considers the consequences of its decisions, policies and actions on biodiversity, ecosystems and the people who depend on them.

As a result, IUCN staff members and others who travel on behalf of IUCN are encouraged to limit the amount of travel they undertake and travel in environmentally responsible ways in order to minimize the overall environmental footprint of the organization.

4. Fair and sustainable work-life balance

Travelling is an integral and essential part of many staff members' responsibilities. IUCN recognizes the impact duty travel has on staff members and their families. Line managers are responsible for helping staff plan their travel, approving their travel and, in consultation with their staff, for taking appropriate measures to facilitate an appropriate work-life balance for each individual.

5. Cost effectiveness and fiscal responsibility

Travel must be cost effective. The traveller and his/her line manager have the responsibility to plan cost effective missions including optimizing the length of stay, the means of travel and travel related expenses.

Travellers are not expected to cover any cost related to duty travel from their personal resources. IUCN has the responsibility to ensure that travellers have access to cash advances or are issued with an IUCN credit card, where appropriate, in order to limit the use of personal resources.

6. Health, Safety and Security

IUCN is committed to ensuring the health and well-being of its staff members while on duty travel and for ensuring that all staff members are covered by appropriate health insurance.

IUCN is responsible for ensuring staff travel using established means of transport that carry a minimum level of risk. Staff are not required to travel to locations or use modes of transportation which are likely to endanger their safety or well-being.

If there is any doubt as to whether staff may be exposed to a high security or health risk, then they should not travel.

6.1. Travel Insurance

IUCN is responsible for ensuring that all IUCN staff are adequately insured for health and accidents while on duty travel. Travellers need to familiarise themselves with [IUCN's Global Travel Insurance](#) policy before travelling.

Please note that Home Leave travel is excluded from the IUCN Global Travel Insurance policy. Employees should contract their own insurance for themselves and their families.

6.2. Health and Security Warnings

Travellers are required to be familiar with the [IUCN Safety and Security Principles and Guidelines](#) and are responsible for checking relevant traveller's safety advice for the destination and route where they need to travel. IUCN's Global Travel Insurance provider offers online [safety, security and health advice](#) through a partner.

If travel is required to a destination that is deemed high risk, the traveller needs to work with their line manager and, where applicable, host country colleagues to identify and put into place appropriate precautionary measures.

Travellers are responsible for acting upon vaccination and immunisation requirements or recommendations and other health-related advice concerning their route and destination. They must take note of the location, symptoms of, and preventative measures against any current epidemic or disease outbreak, including the risk of malaria.

Prior to approving a Travel Authorisation (TA) – see III.1.3 below – the line manager is required to confirm that the relevant health, safety and security checks have been carried out and, where applicable, that appropriate precautionary measures have been taken before approving the trip.

Where such measures to reduce the risks to acceptable levels cannot be found, travel should not be undertaken.

6.3. Health Concerns

Staff members who may require medical aid or medical evacuation during travel due to a pre-existing condition are responsible for ensuring they have sufficient insurance cover before travelling. IUCN's global medical insurance does not cover pre-existing conditions.

6.4. Emergencies

Staff members are responsible for contacting the travel insurance company in the event of a medical emergency. If they are unable to do so this can be done by the Human Resources staff in the location of travel or the duty station on receiving information about the staff member's health concerns.

7. Equitable Applicability

This policy applies to all staff travel funded by IUCN Secretariat funds and applies equally to the following categories of individuals:

- IUCN Staff members
- Junior Professional Officers, interns, volunteers and temporary personnel
- Seconded staff and staff contracted through an agency

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 provided in Annex I <https://portals.iucn.org/union/node/16368>.

Where a duly approved Annex I for a particular Region or Office exists, this Annex I takes precedence over this policy.

Variations can be made by Regional Directors and by the Chief Financial Officer for HQ, to account for local and regional considerations as long as they meet the above principles.

Each Annex I needs to be approved by the Chief Financial Officer and the Global Director Human Resources Management Group.

II. Policy

1. Reimbursement Mechanisms

Transport and accommodation costs are reimbursed on the basis of actual costs incurred, whereas the cost of meals and ancillary costs are reimbursed on the basis of a Daily Subsistence Allowance (DSA).

In the event that local legislation treats DSA as taxable income, a Regional Director/Director of Outposted offices may opt to reimburse all expenses on the basis of actual expenditure incurred, as long as this does not exceed the allowed DSA rate. If this mechanism is being applied it should be noted in Annex 1 to this policy.

2. Transportation

The most appropriate means of transport should be selected, taking into consideration environmental, financial and time-related costs.

When the travel duration in one direction is under four hours by train, travel should be undertaken by train rather than air.

Duty travel should normally begin and finish at the IUCN office, or at the usual place of residence if travelling outside working hours.

2.1. Air travel

The choice of an air ticket should take into consideration:

- a) The **route** – normally the most direct route should be taken, unless there are significant financial gains from taking an alternative route.
- b) The **cost** – the best possible fare should be secured.
- c) **Convenience** – the ticket chosen should take into consideration work and travel commitments and aim for the most optimal use of time.

- 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, if the traveller has back-to-back commitments requiring excessive travel with no opportunity for recuperation between commitments. In such instances, business class travel must be authorised before the booking is made by a Global Director for Headquarters' staff, and by Regional Directors for regional staff. Business class travel of Regional and Global Directors must be authorised by the Director General.
 - iii. Another entity is paying for the ticket and it would not be appropriate to refuse the offer, e.g. when accompanying a VIP on a trip and that person is travelling in business class.

The willingness of a donor to fund business class travel is not sufficient justification.

These restrictions on business class travel apply to all trips regardless of the source of funding.

First class travel is not permitted.

Air miles

Air miles earned on duty travel belong to the individual and can therefore be used for the purchase of personal air tickets. Travellers are, however, encouraged to use such air miles for work-related travel, e.g. to upgrade economy class or economy plus/premium class tickets to business class.

2.2. Sea, train, bus, and other public transportation

First class travel is authorized on sea, train, bus or other public transportation systems for travel durations exceeding two hours, or for shorter periods in countries where 2nd class travel is of a particularly low standard.

2.3. Taxi

¹ Economy premium or the equivalent is provided on limited number of airlines, e.g. British Airways, Lufthansa, Air France and KLM and provides additional seating space. Due to the limited number of seats available in this class, early booking is required to ensure a reasonably priced ticket.

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

Travellers will be reimbursed for the actual cost of accommodation. Reasonably priced, mid-range hotels, in a safe location, should be used where possible. Luxury hotels will not be reimbursed unless at a similar rate to reasonably priced, mid-range hotels or if it is required to stay in such a hotel for a specific event.

If a traveller elects to stay with family, friends, or colleagues, at no cost to IUCN, he/she is eligible to claim the daily subsistence allowance (DSA).

4. Daily Subsistence Allowance

The purpose of the Daily Subsistence Allowance (DSA) is to cover the cost of meals and certain ancillary costs.

The DSA is based on the per diem scale used by the UN². The DSA rates are updated once a year. <https://portals.iucn.org/union/node/16863>

The full DSA is given for each full calendar day of travel. For day trips, not requiring an overnight stay, actual costs are reimbursed.

² The IUCN DSA is based on the UN per diem scale discounted by 15%.

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

Travellers using their personal credit cards or bank cards will be reimbursed any charges directly related to the payment of work-related expenses or the withdrawal of cash to settle such expenses.

5.3. Vaccinations and medicines

Vaccinations and medicines that are necessary to undertake duty travel.

5.4. Visas

Visas that are necessary in order to undertake duty travel.

5.5. Passport renewals

Under certain circumstances, such as the need for two passports for political or practical reasons directly related to duty travel, or when a passport has been filled with visas related to duty travel before the actual expiry date, passport renewals will be reimbursed for IUCN staff.

5.6. Airport lounges

The cost of airport lounges is allowed for stopovers exceeding 4 hours.

5.7. Additional luggage

The cost of additional luggage will be reimbursed when it is work-related and alternative means of transporting the goods would not be feasible or cost effective.

Travellers should endeavour to send items by mail or courier ahead of events or meetings or source items locally where practical and economical.

5.8. Hospitality

Hospitality while on duty travel is usually limited to the purchase of food and drinks, but subject to the regulations of the donor if funded from restricted funding. Travellers should obtain written approval from their line manager for hospitality related events prior to travel. A justification including the number of guests hosted and the reason for the hospitality should be provided with the traveller's expense claim.

5.9. Special events

For special events, such as workshops, conferences, congresses, etc. coordinated by the Secretariat, those responsible should ensure that the optimum number of people attend the event to ensure effectiveness and to minimize the environmental impact. Costs for accommodation, meals, transportation and other costs may be specifically calculated depending on the circumstances and financial conditions of the event.

5.10. Equipment

Equipment such as computers, cameras should not be purchased while on travel unless there are exceptional reasons for doing so. Such purchases must follow the IUCN procurement policy and procedure.

6. Receipts

Travellers are required to obtain receipts for all items to be reimbursed, other than those items covered by the DSA. If it is not possible to obtain a receipt, reimbursement will be given in exceptional cases when written justification is provided.

7. Compensatory time off

Compensation for travel-related overtime, e.g. week-end travel or extensive travel is granted in accordance with local Conditions of Service.

IUCN provides compensatory leave for overnight travel or travel at weekends in accordance with local conditions of service. All leave must be recorded in HRMS and approved by the individual's line manager.

8. Travel insurance

8.1. Travel insurance

[Travel insurance](#) is provided by IUCN for members of staff required to undertake work-related travel. Conditions of applicability should be consulted before undertaking work-related travel

8.2. Loss of property

In the event that property is lost or stolen while on duty travel, IUCN staff should submit an insurance claim for the loss to the Global Human Resources unit in Gland, provided that such loss was not due to the traveller's own negligence. Lost or stolen property should be reported to the police in the location of the event and this report should be submitted with the insurance claim.

9. Travel advances and credit cards

Travellers are responsible for ensuring that they have secured the appropriate resources to cover their costs prior to travel. Travel costs may be funded through the use of a travel advance or an IUCN credit card. Alternatively, a traveller may decide to fund travel costs from their own resources and request reimbursement on completion of the trip.

9.1. Travel Advances

Travel advances are available to staff who have not been issued with an IUCN credit card or in cases where credit cards are not accepted. An advance of up to 100% of the estimated costs of an authorized trip will be given provided the individual's staff account is in good order. If two or more trips follow each other in succession (i.e. within one week) additional advances may be provided before previous expense claims have been submitted and the previous advances cleared.

Advances are provided in a currency maintained by the relevant office. An unspent advance should be returned in the same currency as it was given. It is the responsibility of the traveller to ensure that unspent portions of currencies purchased with the travel advance are converted back to the currency of the advance.

All advances shall be settled, whether a reimbursement is due to, or a payment due from, the traveller, within 30 calendar days of the last day of travel.

9.2. Corporate Credit Cards

Staff members who travel frequently are entitled to an IUCN credit card, subject to the policy of the office where the person is based. The issuance of a credit card requires the prior approval of the line manager and the finance officer of the office concerned. Credit cards issued in the name of IUCN are the property of the issuing bank and must be kept secure at all times.

IUCN credit cards shall be used only for IUCN expenses and not for personal expenses. It is the responsibility of all staff members issued with corporate credit cards to avoid misuse and to exercise due care in the use of the cards.

Applicable limits shall be determined, at Headquarters by the Chief Financial Officer, or in other locations by the head of office in conjunction with the appointed finance officer.

Advance permission from the local finance manager is required to use the corporate credit card for covering large operational costs (over CHF 500) that do not directly relate to the holder's travel expenses and which would normally be administered through a separate purchase order.

Cash withdrawals are not allowed except if required in emergency situations or in exceptional circumstances.

All expenses on corporate cards shall be submitted for approval on a monthly basis to the appropriate line manager as part of the expense claim process.

Settlement of credit card balances will be made by the finance department in accordance with the settlement terms of the credit card contract.

10. Compensation for CO₂ emissions

Offsetting emissions for IUCN air travel is mandatory for all IUCN funded travel. The mechanism used to calculate the cost of CO₂ offsets should be detailed in Annex 1 and should conform to IUCN's Carbon Offset Policy and Procedure.

11. Combined Travel: Work-related and Personal Travel

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 by the traveller's line manager prior to travel and before any commitments are made. The STO referred to above should be attached to the TA prior to approval. In cases where travel is funded by a different cost centre than the traveller's own, the travel must also be authorized by the budget holder. The TA does not need to include actual air ticket costs; only an estimate is required.

For airline travel it is not necessary to obtain 3 alternative ticket proposals prior to the approval of the TA. These would normally be obtained after approval of the TA. The proposals should be retained by the individual traveller and discussed with the traveller's supervisor in the event that the choice of ticket is not obvious, taking into account the criteria in section II 2.1.

Changes to travel itineraries or any changes that result in the initial cost estimate no longer being valid (the estimate is no longer valid if the expected cost is more than 20% of the initial estimate) also require the approval of the traveller's line manager and, where relevant, the budget holder.

1.3. Booking

Authorised travel agents (Annex 1) should normally be used for booking air travel. Direct bookings via the internet are only allowed if specified in the applicable Annex I and only for air tickets costing CHF 500 or less. Before purchasing a ticket, alternative proposals should be obtained (different routings, airlines, timings etc.) so as to obtain the most economical fare. Air tickets should be booked a minimum of two weeks in advance to avoid premium rates unless exceptional circumstances arise.

³ For offices using the ERP travel portal the STO can be attached to the TA electronically. For offices not using the ERP travel portal a hard copy should be attached to the hard copy TA.

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

2.1. Travel Expense Claims

A standard expense claim provided through the ERP system, or by each office for those offices not using the travel and expense claim portals of the ERP, should be used for all travel related expenses.

Expense claims must be submitted within 30 calendar days of the last day of travel. At the end of the calendar year, all expense claims for travel in that year must be submitted in accordance with the year-end close timetable.

Travel expense claims must be approved by the person's line manager and be referenced to the related Travel Authorisation.

Expenses should be recorded in the currency in which the expense was incurred. Expenses are translated to the currency of reimbursement (the operational currency of the office concerned) on the basis of the rate of exchange of the date the expense claim is made.

Expenses, other than DSA, must be supported by receipts. Receipts must be photocopied and attached to the Expense Claim in the ERP portal to facilitate review and approval by the person's line manager. Originals must be retained for audit purposes and submitted to Finance.

Expense claims must be submitted in the office where the individual is based. Reimbursement will be made from the same office.

2.2. Disallowed expenses

Expenses are subject to review by the traveller's line manager and the finance unit of the office concerned. In the event that any expenses are disallowed due to non-compliance with this policy the responsible finance officer will inform the traveller of the disallowed expenses and the amount actually reimbursed within 30 days of receipt of the expense claim.

2.3. Back to Office Report

A Back to Office Report (BTOR) should be completed and issued within five (5) business days of return from any, and for all, IUCN travel.

This can be found on the Union Portal at: <https://portals.iucn.org/union/node/26516>