



# IUCN Travel Policy and Procedures for Non-Staff

April 2019 – Version 1.1



## Code Version Control and History: IUCN Travel Policy and Procedures

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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 <sup>th</sup> April 2019
Approved by	Chief Financial Officer
Applicable to	All non-IUCN-employees whose travel is funded by IUCN Secretariat funds. This policy applies irrespective of the funding source.
Purpose	The aim of the policy is to provide guidance to non-IUCN staff when travelling on behalf of IUCN.
Is part of	IUCN Internal Control Policy Framework
Related Documents	IUCN Travel Policy and Procedures
Distribution	Available on the external IUCN website and Union Portal (intranet), referenced in IUCN's standard template consultancy agreement, and available on request.

### Document History

Version 1.0	Drafted July 2018
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For further information contact:  
IUCN Contact Person

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# I. Purpose and Principles

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## 1. Purpose

The purpose of the IUCN Travel Policy and Procedures is to provide guidance to individuals whose travel is funded by IUCN Secretariat funds but who are not employees. This includes Commission members travelling using Commission Operating Funds (COF), invitees to meetings, as well as external consultants. The policy encourages environmental accountability, cost effectiveness and fiscal responsibility, and that health, safety, and security concerns are met.

## 2. Definition of terms

**IUCN Contact Person** The IUCN staff member responsible for instructing or inviting the Traveller. If the Traveller is a paid consultant, the IUCN Contact Person will be named in the consultancy agreement. For IUCN Commission members using Commission Operating Funds, the IUCN contact person is the relevant Commission Chair.

**Traveller** The non-staff individual whose travel is funded by the IUCN Secretariat.

## 3. Requirement to travel

Travel should only be undertaken when explicitly approved by the IUCN Contact Person<sup>1</sup>.

The IUCN Contact Person has the responsibility carefully to consider the need for 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.

## 4. 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, Travellers and their IUCN Contact Person 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.

## 5. Cost effectiveness and fiscal responsibility

Travel must be cost effective. The Traveller and the IUCN Contact Person have the responsibility to plan cost effective missions including optimising the length of stay, the means of travel and travel related expenses.

## 6. Health, Safety and Security

Travellers are not required to travel to locations or use modes of transportation which are likely to endanger their safety or well-being. Travellers shall liaise with the IUCN Contact Person to assess the health, safety and security situation at all destinations before travelling.

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

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<sup>1</sup> The IUCN Contact Person may delegate this role to another IUCN Secretariat staff member (or Commission member for COF), who may therefore respond and approve on the Contact Person's behalf.

## 6.1. Security and Safety

Travellers are required to be familiar with relevant security information concerning their travel route and destination, and to take precautionary measures as appropriate. Such information can be found on most countries' Foreign Office websites, for example for the Swiss government, FDFA: <https://www.eda.admin.ch/eda/en/home/representations-and-travel-advice.html>

## 6.2. Health Warnings

Travellers are responsible for acting upon vaccination and immunisation requirements or recommendations and other health-related advice concerning their route and destination, which can usually also be found on Foreign Offices' websites (for example see 6.1 above). They must take note of the location, symptoms of, and preventative measures against any current epidemic or disease outbreak, including the risk of malaria.

## 6.3. Emergencies and Insurance

Travellers are responsible for having adequate insurance cover related to health and safety, delays, cancellations and other travel-related risks.

In case of an emergency, Travellers are responsible for contacting their travel insurance company and to make appropriate arrangements to deal with the emergency. IUCN's insurance policies do not cover non-employees.

Travellers who may require medical aid or medical evacuation during travel due to a pre-existing condition are responsible for disclosing such conditions to the IUCN Contact Person prior to departure.

# II. Policy

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## 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. Travellers should contact their IUCN Contact Person for clarification if needed.

## 2. Transportation

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

Travel by air is permitted only when the travel duration in one direction is over four hours by train or bus/coach, subject to security risks as stated in I.6 above and II.2.1d below.

Travel should normally begin and finish at the Traveller's usual place of residence.

### 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) **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.
- d) **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 IUCN Contact Person's discretion.

### Class of Travel

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

Economy plus/premium class<sup>2</sup> is allowed for total flying time of over 8 hours.

Business and First class travel is not permitted.

### Air miles

Travellers are permitted to accrue air miles for their personal use, but this must not be allowed to influence the selection of the flight/airline.

## **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 2<sup>nd</sup> class travel is of a particularly low standard.

## **2.3. Taxi**

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

## **2.4. Car rental**

Car rental may be authorised by the IUCN Contact Person 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, prioritising 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.

# 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.

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<sup>2</sup> 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.

## 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 UN<sup>3</sup>. The DSA rates are updated once a year.

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

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 trips requiring an overnight stay, for the day of departure and day of return, only the portion of the DSA from the time of departure or to the time of return may be claimed, subject to the above limitation regarding meals included in the flight/hotel/meeting. 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.

### Ancillary costs

The following ancillary costs are covered by the DSA:

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

## 5. 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.

## 6. Insurance

Travellers shall maintain at their own expense all relevant insurance, including health/medical insurance and travel insurance. If travel involves attendance of an event organised by IUCN Secretariat, relevant insurance may be provided, but it remains the Traveller's responsibility to verify whether this is the case.

Travellers are responsible for ensuring the safety of both IUCN property and their own, including cash, while on travel.

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<sup>3</sup> The IUCN DSA is based on the UN per diem scale discounted by 15%.

## III. Procedures

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### 1. Prior to Travel

#### 1.1. Planning and Authorisation

All IUCN-funded travel must be planned well in advance of the date of travel and authorised by the IUCN Contact Person. 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”.

#### 1.2. Booking

Authorised travel agents should normally be used for booking air travel. Travellers need to consult their IUCN Contact Person to determine what the relevant arrangements are in this respect.

In general, direct bookings via the internet are only allowed 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 must be booked a minimum of two weeks in advance unless IUCN requests travel at shorter notice than two weeks’.

Where credit cards are used to purchase tickets on-line, 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

Expense claims must be submitted within 30 calendar days of the last day of travel for each trip, and in any case within 30 calendar days of the end of the contract, if applicable.

Travel expense claims must be submitted to and approved by the IUCN Contact Person.

Expenses should be recorded in the currency in which the expense was incurred. Expenses are translated to the currency of reimbursement (usually 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.

#### 2.2. Disallowed expenses

Expenses are subject to review by the IUCN Contact Person 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.