

New Zealand Society for Music Education Inc. (MENZA)

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## Travel and Accommodation Policy

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### People

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Board Members

Workshop Facilitators and other Board Contractors

People as deemed acceptable by the MENZA Board

### Rationale

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The Board agrees that it has a responsibility to ensure that travel expenditure incurred by parties listed above must clearly be linked to the business of the organisation .

This policy must be read in conjunction with other Board Policies.

Planned travel, which is a cost to MENZA, should be part of the organisation's budget.

Unforeseen travel costs are to be approved by the Chair, Deputy Chair and/or Treasurer.

### Principles

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The Board agrees to ensure that:

- Travel expenditure is on the Board's business, and the member obtains an acceptable benefit from the travel when considered against the cost;
- Expenses are reimbursed on an actual and reasonable basis; and
- People who are required to travel on business do not suffer any negative financial effects (providing they have followed the guidelines listed below).

### Policy Statement

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1. Under no circumstances may any person or people approve their own travel.
2. All travel to/for MENZA workshops/hui must be authorised by the MENZA board prior to the expenditure being incurred.
3. Subsequently, all travel to/for NEX workshops must be authorised by the NEX sub-committee prior to the expenditure being incurred.
4. As much as possible all bookings are to be conducted through MENZA's normal purchase procedures. This includes the booking of accommodation, flights, and rental cars etc.

5. Travel bookings are permitted to be made using personal funds and will be reimbursed by MENZA. However, they must be authorised by the MENZA board prior to the expenditure being incurred.
6. Any departure from the normal purchase procedures must be authorised by the Chair, Deputy Chair and/or Treasurer, prior to the expenditure being incurred.
7. People must travel by the most direct route unless scheduling dictates otherwise.
8. The most cost-effective option needs to be used when travelling; any costs above this/upgrading etc may be passed on as a personal expense unless authorised by the chair.

#### TRAVEL WITHIN NEW ZEALAND

1. The justification for travel within New Zealand must be documented. It is to be transparent and must relate to a MENZA need.
2. All flights should be booked as early as possible and the least expensive, fully-refundable flights booked where appropriate up to the 30 June 2026, after which this policy will be reviewed.
3. Travellers are strongly encouraged to purchase travel insurance at their own expense. Those who choose not to do so will be personally responsible for any costs arising from changes to travel plans, lost luggage, or other unforeseen events.

#### ACCOMMODATION

1. People should opt for accommodation that is appropriate to the purpose of the travel.
2. People who stay privately will be reimbursed on production of receipts, for koha or for the cost of a gift given to the people they have stayed with. Prior to travel, the staff member should receive authorization for the value of the intended koha/gift (not exceeding \$100).
3. New Zealand per diem rates provide for a maximum of \$220 (including GST) for accommodation.

#### MEALS

1. Meals/per diem allowance is a maximum of \$80 per day, and \$10 for incidentals. (Please note the meal and incidental rates are inclusive of GST). Alcohol will not be covered by MENZA.

#### VEHICLES

1. When using rental cars, staff should opt for good but not superior model vehicles and should be prepared to justify any exceptions to this rule to the Board Chair.
2. Rental Car insurance is required, and it is expected that the most affordable option is considered.
3. In the event of an accident, the excess will need to be paid by the person at fault. To comply with health and safety requirements, travelers must take appropriate rest breaks during long journeys (recommended minimum 15-minute break every 2

- hours), avoid driving when fatigued, and comply with all road safety regulations. MENZA has a duty of care to ensure safe transportation of its representatives.
4. Where private vehicles are used, these should have an up-to-date warrant of fitness (WOF), and car registration. Drivers should hold an appropriate Driver's Licence for the task.
  5. Use of private vehicles is to be approved on a one-up basis, and reimbursement will be at the current rate set by the IRD  
<https://www.ird.govt.nz/income-tax/income-tax-for-businesses-and-organisations/types-of-business-expenses/claiming-vehicle-expenses/kilometre-rates-2023-2024>
  6. If unexpected taxi travel is required, travellers should pay for them out of their own pocket, obtain a receipt, and seek reimbursement as part of an expense claim (subject to approval). MENZA will not cover any cost associated with traffic violations, such as parking or speeding tickets.

## REIMBURSEMENT OF EXPENSES

1. The reimbursement of expenses related to business travel will be on the basis of what is actual and reasonable. Such expenses should be consistent with the line of work for the Board that is being undertaken by the claimant.
2. If extraordinary expenses are envisaged (e.g. hosting a meal) these should be budgeted for and approved by the MENZA Board or NEX sub-committee.
3. MENZA will not meet expenses incurred on behalf of a spouse or travelling companion. In the event of a person travelling with a colleague or family member, a reconciliation of expenses should clearly demonstrate that the organisation did in no way incur additional expenditure.
4. All receipts must be retained and attached to the travel claim. The claim is to be authorised on a one-up basis. All financial records, including travel and accommodation receipts and claims, must be retained for a minimum of 7 years as required by the Tax Administration Act 1994.
5. For expenditure incurred in New Zealand of value greater than \$50 (including GST), a valid GST tax invoice must be obtained containing: supplier's name, GST number, date, description of goods/services, and amount of GST charged. Digital receipts are acceptable if they contain all required information. For international expenses, appropriate documentation must be retained according to IRD requirements to support the organisation 2020 GST returns.
6. Authorisation can still be given for expenditure less than \$50 where there is no receipt, for example if it is not practical to obtain a receipt or if the receipt is lost. The expenditure can be reimbursed provided there is no doubt about its nature or the reasons for it.

The Chair shall institute procedures pursuant to this policy.

On behalf of MENZA:

Date:

This policy will be next reviewed at the Annual General Meeting

Created and Approved: June 2024