# Protocol: ANU/CDU International Travel Fund

All PhD scholars can apply to access the Foundation’s International Travel Fund for up to A$40,000 to be used for international or domestic travel (up to 25 per cent) during the scholarship.

The Sir Roland Wilson Foundation (the Foundation) International Travel Protocol should be read in accordance with the [ANU Travel Policy](https://policies.anu.edu.au/ppl/document/ANUP_000476) and the [ANU Travel Handbook](https://services.anu.edu.au/files/resource/ANU%20Travel%20Handbook.pdf). The ANU travel policy applies to all domestic and international travel arrangements of travellers on approved University business regardless of the source of funds, the duration of travel, or the purpose of travel. The Foundation will only support arrangements that comply with the ANU policy, procedure and guidance.

Travel arrangements must be made in close consultation with your academic supervisor and college/school administration. As a general principle, the Foundation requires all scholars to have completed the confirmation of candidature prior to undertaking international travel.

Please allow sufficient time to make your travel arrangements to minimise the risk of booking delays, as the Foundation is not resourced to support parallel arrangements outside the ANU system.

The Foundation operates in accordance with the [ANU Below-Zero](https://sustainability.anu.edu.au/files/2024-04/Below%20Zero%20Strategic%20Plan%202022-2031.pdf) Program to reduce the university’s carbon footprint, including activities to reach net zero greenhouse gas emissions by 2025 and below zero emissions by 2030. [ANU Travel Policy](https://policies.anu.edu.au/ppl/document/ANUP_000476) states that ‘travel significantly contributes to the overall emissions at ANU’. You are asked to consider the policy and [available resources](https://sustainability.anu.edu.au/solutions/climate-change-energy/university-related-travel#B0023), and the impacts of your travel choices for your research or study. Where possible, this could include avoiding carbon intensive forms of travel or shifting to lower carbon modes.

The Fund is proposal-based and contingent on annual budget approval by the Foundation’s Board of Directors.

Any un-accessed travel money remains with the Foundation and is not payable to the scholar.

## International Travel

The fund can be used to attend and present at conferences, undertake research (i.e. data collection, interviews, or access archives and residencies), and meet with academic and public service counterparts.

The program of travel must complement the scholar’s research, aim to deepen their professional networks, and provide exposure to international models; and is to be developed in consultation with the scholar’s academic supervisor and the Foundation.

In October each year, scholars are invited to submit a 12-month travel plan for the following year that maps out travel opportunities and a proposed budget. Scholars are only able to access the Fund on the basis of the 12-month plan. Subject to budget availability, the Foundation may place an annual cap on expenditure to allow equitable access to the Fund for all PhD scholars.

The Fund covers costs such as airfares, accommodation, conference fees and any other travel-related costs such as visas associated with the scholar’s travel. It does not cover passport fees or any costs associated with any partner or family members who may be travelling with the scholar.

The Foundation asks all scholars to acknowledge and promote the Foundation whilst travelling. This could include submitting a small number of high-quality photos from each trip for the Foundation to share through its social media channels.

**Engagement with DFAT posts**

You should travel with ordinary passports while on scholarship. Most Foundation scholars travel without any engagement with Department of Foreign Affairs and Trade (DFAT) overseas posts. In a small number of instances, you may seek posts’ assistance in advance to support contacts for interviews or high-level meetings to support your research. Please contact the Foundation if you intend to seek DFAT’s support for your overseas travel.

Where post engagement is required, you should reach out early. Your senior APS mentors will usually be the most appropriate and effective conduit to contacting senior staff at posts.

**Gifts**

You must pay for all gifts offered as part of travel, conferences, and visits to other institutions. The Foundation can provide a small amount of branded merchandise to be used as gifts.

## Domestic Travel

If a scholar is required to undertake significant field work domestically, a scholar may apply to the Foundation to use part (up to 25 per cent) of the Fund for domestic travel. A scholar must exhaust their college funds, if applicable, prior to applying for access to the Fund for domestic travel.

Requests for domestic travel funding will be considered by the Foundation and will take into account:

* the relevance of the domestic travel to the scholar’s PhD program;
* the amount of college funding available to the scholar; and
* whether the domestic travel is part of a broader program of international travel by the scholar.

## Travel Approval Procedure - ANU PhD

*(note: you must complete the steps below prior to making any bookings)*

1. Work with your academic supervisor to develop your travel proposal and seek their in‑principle support.
2. Work with the Foundation to complete the ANU/CDU International Travel Proposal Form (*your proposal seeks approval to release Foundation funds for your travel*).
3. Submit the Form with an email from your academic supervisor supporting the travel proposal to [srw.foundation@anu.edu.au](mailto:srw.foundation@anu.edu.au) for approval.
4. Receive approval from the Executive Director for your travel proposal.
5. Work with your school to complete the [Travel e-form](https://eforms.anu.edu.au/Infiniti_Prod/Produce/WebLogin.aspx?ReturnUrl=%2fInfiniti_Prod%2fProduce%2f) for formal financial delegation and ANU approval.
6. Select YES for Per Diem payment to cover meals and incidentals.
7. When selecting Travel Budget, always select ‘Funds Administered by the ANU’.
8. When selecting Payment Type, always select either ‘Direct Payment to Supplier’ or ‘Reimbursement’. The Foundation does not provide cash advances for any travel expense type.
9. For **Sir Roland Wilson scholarship**, enter the general Ledger Code:
   1. Fund = E
   2. Department = (contact Foundation for code)
   3. Project ID = 01
10. For **Sir Roland Wilson Pat Turner (ANU) PhD scholarship**, enter the General Ledger Code:
    1. Fund = W
    2. Department = (contact Foundation for code)
    3. Project ID = 01
11. Under ‘Supporting Documentation’ add approved Foundation International Travel Proposal Form.
12. Submit the ANU Travel e-form for approval.
13. Once approved, email a copy of the Travel Summary to the Foundation.
14. You will need to wait until your ANU Travel e-Form has been approved in the system before you can book travel.

## Travel Approval Procedure – CDU PhD

1. Complete the **ANU/CDU International Travel Proposal Form** andthe[**ANU Approval to Travel form**](https://policies.anu.edu.au/ppl/document/ANUP_000846).
2. Complete an [ANU Vendor Application](https://policies.anu.edu.au/ppl/download/ANUP_000856) form for reimbursements and an [ANU Accounts Payable Voucher Request](https://policies.anu.edu.au/ppl/document/ANUP_000987) form for per diem payments.
3. For per diem payments to be paid in advance, include an Excel spreadsheet with dates of travel and per diem calculations.
4. Submit the forms with an email from your academic supervisor supporting the travel proposal to [srw.foundation@anu.edu.au](mailto:srw.foundation@anu.edu.au) for approval.
5. Receive approval from the Foundation Associate Director for your travel proposal.
6. Book flights and accommodation through CTM or the Sir Roland Wilson Foundation Office Manager.

## Travel (Flights)

All bookings, where possible, should be made with the ANU preferred travel agent, Corporate Travel Management (CTM). Bookings can be made over the phone (1300 014 962) or email: [academic@travelctm.com](mailto:academic@travelctm.com).

Once confirmed, ask your Travel Agent to forward the invoice to the Foundation for payment.

If you wish to make a flight booking yourself instead of through CTM, you must receive approval from the Foundation as part of your travel proposal **before** booking in order to claim reimbursement.

## Accommodation

Accommodation should be booked and paid for prior to travel. Please arrange this through CTM.

If you wish to make an accommodation booking yourself instead of through CTM, you must receive approval from the Foundation as part of your travel proposal **before** booking in order to claim reimbursement.

## Per Diem

Scholars travelling internationally and domestically are paid a [per diem](https://services.anu.edu.au/human-resources/business-travel/travel-allowance-per-diems-for-domestic-and-international-travel) through the ANU Travel e-form process. The per diem covers food, drinks and incidentals (i.e. public transport, SIM cards, and travel adaptor). Per diems are payable from the time of arrival on the first leg of a trip until the time of departure for the final return leg (excluding any personal time).

ANU per diems are paid at 50 per cent of the [Australian Taxation Office](https://atotaxrates.info/allowances/ato-reasonable-travel-allowances/) minimum salary level category per diem rate for daily food and drink and incidentals. Per diem payments will only be processed five days prior to departure.

## Reimbursements

All reimbursement requests must be accompanied by valid receipts or proof of purchase. Reimbursements may be requested for items such as visas, pre-approved accommodation (e.g. AirBnB) and travel expenses (e.g. car hire).

If you are seeking reimbursement for travel costs, please provide reimbursement and e-form documents to the Foundation at the same time as lodging in the ANU or CDU self-service systems. The onus is on scholars to track and account for all expenditure under the Fund.

All reimbursements must be completed in Australian Dollars with an explanation and translation of all foreign receipts and their conversions. For any payments made in a foreign currency, please provide a bank statement in Australian dollars to show the amount paid on that date.

ANU PhD scholars must create and submit a Reimbursement Claim through the ANU [finance self-service portal](https://services.anu.edu.au/information-technology/software-systems/finance-self-service/finance-self-service-reimbursements). Please see [here](https://services.anu.edu.au/files/user-guide/Create%20a%20Reimbursement%20Claim.pdf) for step-by-step instructions on how to process a Reimbursement Claim and [here](https://services.anu.edu.au/information-technology/software-systems/finance-self-service/finance-self-service-reimbursements) for more reimbursement questions and answers.

CDU PhD scholars must complete the [Guest Reimbursement Request Form](https://policies.anu.edu.au/ppl/download/ANUP_7482963) and email the form with all receipts/invoices to [srw.foundation@anu.edu.au](mailto:srw.foundation@anu.edu.au).

If you have any questions about the Reimbursement Claim or Reimbursement Request Form, please consult with the Foundation before submitting.

## Ten per cent buffer

We understand that sometimes costs for travel and accommodation vary in the time between submitting your travel proposal with your proposed budget and booking your travel. This can impact your actual travel expenses and the amount of funds remaining. We strongly recommend that you include an extra 10 per cent on your calculated budget to take into account potential variability in travel and accommodation costs between submitting your travel proposal and making your bookings.

## Additional Travel

ANU PhD scholars must complete a supplementary ANU Travel e-form if, whilst overseas on your approved travel, you need to make additional trips not covered in your original approved plan. You need to complete the e-form, even if you are not requesting any additional funds.

CDU PhD scholars must email the Foundation directly regarding any changes.

## Travel Diaries

[Travel diaries](https://policies.anu.edu.au/ppl/document/ANUP_000847) must be maintained for all international journeys and domestic journeys of more than five night’s duration. Refer to the ANU Travel Handbook for more information.

## Budget tracker

The Foundation strongly recommends scholars use a [budget tracking spreadsheet](https://srwfoundation.anu.edu.au/sites/default/files/2023-10/SRW%20Travel%20Tracking.xlsx) to assist with ensuring all aspects of travel are accounted and paid for in a timely manner.

Should your total travel expenditure exceed your approved budget you **must** let the Foundation know, and you will need to submit a document that accounts for the differences between the approved budget and actual expenditure for each line item.

## Carers’ Assistance/ Travelling with partners or other family members

Scholars with caring responsibilities (including dependent children, an elderly parent, or a family member with a disability) can apply for up to A$2,000 annually for costs related to providing alternative arrangements while traveling internationally. This should be included in the International Travel Proposal Form and is part, not additional to the total possible allocation of $40,000 per scholar.

The Foundation will approve reasonable costs where existing care arrangements are not suitable and alternative care is required in order for the scholar to travel internationally.

Alternative care arrangements include:

* childcare costs for dependent children
* care costs for dependents other than children
* airfares for the dependent to accompany the scholar.

Note funds cannot be used for existing childcare or other related costs of caring.

IMPORTANT: The Foundation does not cover any costs or assist with any bookings for partners or family members travelling with you. As a courtesy, please advise the Foundation if you intend to travel with your partner or other family members.

## Changes to the travel proposal

If for any reason your travel is cancelled after your proposal has been approved by the Foundation and the ANU Travel Form process, you must inform the Foundation as soon as possible, and cancel your approved ANU Travel Form, instructions [here](https://services.anu.edu.au/human-resources/business-travel/travel-approval-eform-faq).

If there are any significant changes to your travel plans after the proposal has been approved, you **must** submit a new travel proposal for approval and amend the ANU Travel Form. Significant changes include:

* altering travel destinations, such as adding or removing a destination
* altering timeframes spent in destinations by more than **two** days
* any other changes that will substantially impact the proposed budget

## Sustainability

The Foundation operates in accordance with the [ANU Below-Zero](https://sustainability.anu.edu.au/files/2024-04/Below%20Zero%20Strategic%20Plan%202022-2031.pdf) Program to reduce the university’s carbon footprint, including activities to reach net zero greenhouse gas emissions by 2025 and below zero emissions by 2030.

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# Proposal Form: ANU/CDU International Travel

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For more details, refer to Protocol: **ANU/CDU International Travel Fund**.

Proposals, once approved by the Foundation, authorise the release of funds. Following Foundation approval, ANU scholars need to complete the ANU e-form process for formal financial delegation and approval from your school/ college. CDU scholars liaise directly with the Foundation.

|  |  |
| --- | --- |
| Name: | |
| Purpose of travel/rationale: |  |
| Proposed dates of travel: |  |
| Proposed institutions:  (Include dates and locations) |  |
| Proposed academics  (include dates and locations) |  |
| Proposed conferences  (include dates and locations) |  |
| Other: | I understand that travel now carries additional risks and I understand and accept the risks of travelling to the [insert country], including the current insurance coverage for those countries. I have provided my travel itinerary to the ANU’s International SOS membership team and will follow the advice they provide, including utilising their emergency assistance options if required. I have completed a risk assessment for [insert relevant contact at your school/ college] to approve. I have reviewed ANU travel policy, and I will adhere to local laws and regulations and have the proper exemptions to be leaving Australia. me.  I have discussed this proposal with my supervisor and they are supportive. Email attached. |
| Proposed budget | |
| Travel  (Include flights, dates and locations, car hire etc.) |  |
| Accommodation  (Include dates and locations) |  |
| Per diem  (Fifty per cent of the ATO minimum salary level category per diem rate. Refer to [ANU travel policy](https://policies.anu.edu.au/ppl/document/ANUP_000476)) |  |
| Visa |  |
| Other  (E.g. conference fees, interpreters) |  |
| Ten per cent buffer  (for variations in travel  and accommodation costs) |  |
| Budget total |  |