



education

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# MDoE TRAVEL AND ACCOMMODATION POLICY

*MDoE Travel and Accommodation Policy*

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## *MDoE Travel and Accommodation Policy*

### **DEFINITIONS**

In this policy, unless the context indicates otherwise:

**Cost Centre Clerk:** Person responsible for making travelling and accommodation arrangements in the relevant unit/branch.

**Department:** Mpumalanga Department of Education (MDoE).

**HOD:** Head of Department

**Employee:**

- Person appointed in terms of the Public Service Act, 1994 (Act no 103 of 1994) and Employment of Educators Act, 1998 (Act No. 76 of 1998) to a post on the establishment of MDoE;
- Person appointed on contract to provide a specific service to MDoE;
- Person appointed as an intern by MDoE and a person appointed by or on recommendation of the HOD as a member of a committee, commission or an institution which is funded by MDoE.
- For the purpose of the application of this policy, a person invited by MDoE to a job interview shall be regarded as if he or she is an "employee" of MDoE.

**Official:** Person who's travelling and accommodation arrangements are being made.

**Authorizing Official:** Person who has been appointed, in writing, to perform functions in respect of approval of travel requests.

**Travel Agent:** The business or company contracted to MDoE to provide travel services.

**TA Form:** Travel Authorisation Form

### **1. INTRODUCTION**

MDoE believes that it should not be expected from its employees to make their own travel and accommodation arrangements when they have to attend to official business away from their headquarters. The relevant services, should be outsourced on a contractual basis and the contract should provide for monthly billing in respect of air travel, hotel accommodation, and car hire as well as quarterly management reports.

Provision should also be made in the contract for the booking of conference venues and related services such as equipment hire and breakaway rooms.

For the reasons stated above and in view of the requirement that travel and accommodation arrangements should be processed through a system which also facilitates accountability and financial control. A travel agent should be appointed on contract to

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provide the relevant services to employees of MDoE on the basis of service agreements that will be entered into.

Competitive bids for such a contract shall be invited in terms of the MDoE procurement policy once every 3 (three) years, with an option to renew for another two years, to ensure that all interested travel agents have the opportunity to compete for the business. The contracted travel agent shall be given instructions by MDoE to arrange bookings strictly in accordance with the provisions of this policy document.

## **2. PURPOSE**

The purpose of this document is to provide for the policy and guidelines according to which employees of MDoE shall request travel and accommodation bookings as well as the hiring of conference venues and services.

## **3. MANDATE**

Part XI of the Annexure to Public Service Co-ordinating Bargaining Council (PSCBC) Resolution number 3 of 1999 mandates MDoE to establish a policy on official travel.

The travel and accommodation policy should be implemented and revised in accordance with the guidelines which are issued from time to time by the Minister for Public Service and Administration.

## **4. REQUIREMENTS**

All requests for bookings shall be submitted on the official travel authorization form (TA). This form must be completed in all respects, signed by the applicant and approved as follows:

<b>APPLICANT</b>	<b>AUTHORISING OFFICIAL</b>
DCES, Assistant Director & below (Regions only)	CES, Deputy Director (Regions only)
CES, Deputy Director and below	Director
Director	Chief Director
Chief Director	Deputy Director General (DDG)
Deputy Director General (DDG)	Head of Department (HOD)
Head of Department (HOD)	Deputy Director General (DDG)

The Objective and Responsibility codes for the relevant programme must be clearly indicated when the form is completed.

**NB:** All travel arrangements should be done and approved in line with the provisions of this policy.

## 5. PROCEDURES RELATING TO AIR TRANSPORT

### 5.1. Travel Classes

Destinations outside the borders of South Africa:

- All officials shall travel business class.

Destinations within the borders of South Africa:

- The Head of Department and Deputy Directors General shall travel business class.
- Officials from Chief Director and below shall travel economy class.

Employee Level	Domestic Flight	International Flight
Deputy Director & below	Economy Class	Business Class
Director	Economy Class	Business Class
Chief Director	Economy Class	Business Class
Deputy Director General	Business Class	Business Class
Head of Department	Business Class	Business Class

If, for certain reasons, an official requests for a different travel class other than one prescribed prior, approval from the Head of Department must be obtained.

### 5.2. Handling of Request (including authorization)

- The travel form is submitted to the authorizing official to obtain approval to travel by commercial airline.
- The authorizing official reviews the request on travel and approves it in order.

#### Approval of official international trips:

- These trips require prior authorization and approval by the HOD, MEC and Executive Council.
- A submission must be compiled and submitted to the Head of Department at least 6 weeks before departure. This is also applicable to official trips that are being funded externally either through sponsorship or by any other means as well.

#### Approval of official local trips:

APPLICANT	AUTHORISING OFFICIAL
DCES, Assistant Director & below (Regions only)	CES, Deputy Director (Regions only)
CES, Deputy Director & below	Director
Director	Chief Director
Chief Director	Deputy Director General

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Deputy Director General	Head of Department
Head of Department	N/A

### 5.3. Booking Process

- If approved to travel, the Cost Centre Clerk will contact the travel agent and make a preliminary booking.
- Approved travel form must be handed in at Supply Chain Management section wherein a responsible official will verify all necessary information and give an order number.
- An approved travel form will be handed to the travel agent.

**NB:** If a preliminary booking has been made for more than one official, each official must have an approved travel form.

- Only when the approved travel form is received, will the travel agent confirm the preliminary booking by issuing the air ticket to the relevant official.
- Tickets should be collected from the travel agent office during normal working hours, i.e. 08:00 to 16:15 on weekdays, where applicable.

### 5.4. Changes to air travel arrangements

- In case of changes occurring to the original travel arrangements, the Cost Centre Clerk must liaise with the travel agent and make the necessary arrangements, with the proviso that such changes are confirmed in writing. The following actions will be taken for the indicated cases:
  - Cancellation of trip: The air ticket is to be returned by the Cost Centre Clerk to the travel agent who will cancel the booking. If payment had been made and an invoice had already been submitted to the MDoE, a credit note will be processed. In the event of the cancellation being charged/levied, the travel agent is to invoice MDoE accordingly.
  - Changes to trip: The Cost Centre Clerk is to approach the travel agent immediately and have the original bookings cancelled and make new bookings.

### 5.5. Replacement of lost air ticket

- The following actions have to be taken:
  - The Cost Centre Clerk will report the loss of the air ticket to the nearest office of the South African Police Services, approach the travel agent to cancel the relevant air ticket and submit the reference number of the particular case as provided by the South African Police Services to the travel agent.
  - The travel agent will approach the airline company concerned to cancel the relevant air ticket and submit the particulars of the report to the South African Police Services.

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- A new air ticket will be issued and forwarded to the official of the MDoE.
- In the case where an invoice has already been issued and submitted to MDoE, a document showing the change in the air ticket number on the invoice only is to be submitted to MDoE.

**5.6. Excess Luggage**

- Official excess luggage will be dealt with as follows:
  - If it is known during the booking process that the official has official excess luggage, MDoE is to include the request in the government order issued to the travel agency when making the booking.
  - If it is discovered while weighing-in at airports, during the trip, the official must pay the cost for any official excess luggage and submit a claim for reimbursement to the MDoE (payments sections).
  - If the official cannot, for any reasons, pay for the excess luggage, he or she must call MDoE emergency line.

**5.7. Lounges at airports**

- Dedicated lounges at airports may only be used by officials if it is at no additional cost to MDoE or if it is included in the relevant air ticket.  
In the event of a reasonable specific and special requirements relating to the trip, MDoE is to make special arrangements with the travel agent at the request of the official who would be travelling.

**6. PROCEDURE RELATING TO VEHICLE HIRE**

**6.1. Rules and Regulations**

- Official vehicles can only be driven by authorized officials.
- Officials from the same Unit/Branch should travel together, wherever possible.

**6.2. Hired Vehicles Classifications**

<b>Employee Level</b>	<b>VEHICLE GROUP</b>
CES, Deputy Director & below	B
Director	C
Chief Director	D
DDG	F/G/H
HOD	J/M/Q

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**6.2.1. Handling of request (including authorization)**

- The Cost Centre Clerk must submit a request on travel form for the renting of a vehicle for use during the official trip to the authorizing official for approval.

**Approval of hired vehicles:**

APPLICANT	AUTHORISING OFFICIAL
DCES, Assistant Director & below (Regions only)	CES, Deputy Director (Regions only)
CES, Deputy Director & below	Director
Director	Chief Director
Chief Director	Deputy Director General
Deputy Director General	Head of Department
Head of Department	Deputy Director General

**6.3. Booking Process**

- After approval of the trip, the Cost Centre Clerk must contact the travel agent and make preliminary bookings. The travel agent will in all instances book vehicles according to the vehicle groups approved by MDoE.
- Approved travel form must be submitted to Supply Chain Management section, wherein a responsible official will verify all necessary information.
- The travel agent will pay the service provider directly and invoice MDoE.
- Vouchers must be collected from the travel agent office during normal office hours, i.e. 08:00 to 16:15, if necessary.
- At the appointed destination, the official approaches the relevant car rental company or meets with the representative of the rental company delivering the vehicle and hands in the voucher for rental. The official will correctly complete and sign the rental agreement on behalf of MDoE.

The following aspects of the rental agreement must be included:

- Collision damage waivers
- Theft waivers

**6.4. Receipt of Hired Vehicles**

- Before taking receipt of the vehicle, the official is to ensure that the vehicle is in good condition, properly filled with petrol, oil and water, and that the mileage on the odometer corresponds with the mileage entered on the rental agreement. Any irregularity or deviation is to be referred to the car rental company before departure.

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#### **6.5. Use of Hired Vehicles**

- While the official is in possession of the vehicle, he/she shall use the vehicle primarily for the official purpose that it was rented for. Furthermore, the official will use the vehicle carefully and take all reasonable precautions to protect the vehicle from theft and damage. If unattended, the official will ensure that the doors and boot are locked, windows are closed, any alarm device or immobilizer is activated and the keys of the vehicle are in the possession or control of the official.

#### **6.6. Changes in Vehicle Hire Arrangements**

- If changes occur to the original vehicle hire arrangements, i.e. a cancellation or changes to the date or time the vehicle is required, the Cost Centre Clerk is to liaise with the travel agent and make the necessary arrangements, with the proviso that such changes are confirmed in writing (through e-mail or fax). The following actions will be taken for the indicated cases:
  - Cancellation of trip: The voucher for rental is to be returned by the Cost Centre Clerk to the travel agent to cancel the booking
  - Changes to trip: The Cost Centre Clerk should immediately approach the travel agent and have the original bookings changed.

#### **6.7. Replacement of Lost Voucher for Rental**

- The travel agent will issue a new voucher for rental of vehicle and forward it to the official.

#### **6.8. Non-acceptance of Hired Vehicle**

- In the event of vehicles not being accepted as booked and the vehicle hire company not being timely advised of any cancellation or changes to the bookings, such non-acceptance of rented vehicles are to be reported by the Cost Centre Clerk to the Supply Chain Management section.

#### **6.9. Return of Hired Vehicles**

- When returning the vehicle, the official must ensure that the vehicle is in good condition.

#### **6.10. Vehicle Collision/Accident/Theft Report**

- In case of any collision, accident or theft of the hired vehicle, or damage to or theft of items from the hired vehicle, the official will immediately report the occurrence to the South African Police Service and the vehicle hire company and complete all the required documentation. If this is not possible, the official will supply the vehicle hire

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company with all relevant documents, statements or particulars concerning the occurrence as reported to the police or traffic authorities.

- In addition to the above, the official shall be required to fill in the MDoE's accident/theft report. All relevant documents, statements or particulars concerning the occurrence must accompany the accident/theft report and be handed in to the Supply Chain Management section.

**6.11. Insurance Claims in Respect of Vehicle Collision/Accident/Theft or Claims in respect of Traffic Fines**

- In case of any claims concerning collision/accident/theft of the rented vehicle, damage to or theft of items from the hired vehicle or traffic offences, the travel agent will submit invoices or summonses containing the relevant information as received from the vehicle hire company. They must be addressed for payment by the MDoE and not the travel agent.

**6.12. Claims against the State**

- The MDoE will consider all invoices received relating to claims in respect of hired vehicle collisions/accidents/damages/thefts, as claims against the State. Such claims will be considered to establish whether:
  - The driver was legally entitled to use the vehicle.
  - The driver was the cause of the collision/accident/damage/theft.
  - A third party was that cause of the collision/accident/damage/theft.
- So that it could be determined whether the State should pay the claims itself or have the responsible official or third party pay the claims.

**6.13. Completion of Rental Agreement on Return of Hired Vehicle**

- The official must endorse on the member's copy of the rental agreement the mileage noted from the odometer, the estimated quantity of petrol used and nature of any damages and/or theft for reconciliation with the invoice received later.

## 7. PROCEDURES RELATING TO ACCOMMODATION ARRANGEMENTS

### 7.1. Accommodation Classifications

Employee Level	Hotel	Extras	Exclusions
HOD	4/5 star	<ul style="list-style-type: none"> <li>• Dinner</li> <li>• Soft drinks</li> <li>• Breakfast</li> <li>• Parking</li> <li>• Laundry /Dry Clean/Valet if away for more than 3 days</li> <li>• Reasonable Service Charge (not over 10%)</li> </ul>	<ul style="list-style-type: none"> <li>• Alcohol</li> <li>• Telephone</li> <li>• TV pay channels</li> <li>• Internet</li> </ul>
DDG's	4 star		
Chief Directors and below	3 star		

- Hotel bookings shall be made on the bed only basis with the following extras:
  - Parking
  - Breakfast
  - Dinner

### 7.2. Handling of Request (including authorization)

- The request for accommodation should be submitted on the travel form to the authorizing official to obtain approval to be accommodated during and official visit away from the headquarters.

Approval of accommodation

APPLICANT	AUTHORISING OFFICIAL
DCES, Assistant Director & below (Regions only)	CES, Deputy Director (Regions only)
CES, Deputy Director & below	Director
Director	Chief Director
Chief Director	Deputy Director General
Deputy Director General	Head of Department
Head of Department	Deputy Director General

### 7.3. Booking Process:

- If approved, the Cost Centre Clerk will contact the travel agent and make a preliminary booking.

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- Approved travel form must be submitted to the Supply Chain Management section, wherein a responsible official will verify the necessary information.
- Only when the approved travel form is received, will the travel agent confirm the preliminary booking by issuing a voucher.
- Vouchers must be collected from the travel agent office during normal office hours, i.e. 08:00 to 16:30 on weekdays, if necessary.

#### **7.4. Changes in Accommodation Arrangements**

- If changes occur to the original accommodation arrangements, the Cost Centre Clerk must liaise with the travel agent and make necessary arrangements, with the proviso that such changes are confirmed in writing. The following actions will be taken for the indicated cases:
  - Cancellation of Accommodation: The voucher for accommodation must be returned by the Cost Centre Clerk to the travel agent.
  - Changes to Accommodation Arrangements: The Cost Centre Clerk must approach the travel agent in time and have the original bookings changed.

#### **7.5. Replacement of Lost Voucher for Accommodation**

- The travel agent will issue a new voucher for accommodation and forward it to the relevant official.

#### **7.6. Arrival at the Booked Accommodation**

- At the reception, the official will hand in the voucher for accommodation, sign the required documents and take possession of the room keys. In case of combined bookings, all officials will individually sign the required documents and take possession of their own room keys.

#### **7.7. Non-utilisation of Booked Accommodation**

- In the event of accommodation not being used as booked and the travel agent not having been timely advised of any cancellation or changes to the bookings, the amount charged as no show fee should be recovered from the official concerned.

#### **7.8. Departure from Booked Accommodation**

- Before departure the official will sign the final voucher. The official must pay cash for the items in the exclusion list under 7.1 above, before departure.

### **8. CONFERENCE VENUES AND SERVICES**

- The contract with the travel agent makes provision for the booking of conference venues and the hiring of related services on behalf of MDoE by the travel agent.
- All bookings for conference venues should be done through the travel agent in order to get a venue at a reasonable cost.

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- The procurement policy and procedures of the MDoE must be complied with, in particular the requirement that competitive price quotations must be obtained through the travel agent from all service providers who can offer acceptable facilities in the area where the event is to be held.
- The travel agent is not obliged to make arrangements/bookings if the supporting documents (e.g. submission, as approved by the relevant programme manager) are not attached to the request for bookings

## **9. PROCEDURES RELATING TO AFTER HOURS BOOKING**

### **9.1. First Step:**

- The official contacts the Cost Centre Clerk who contacts the travel agent and gives all the details.
- The travel agent makes preliminary bookings.

### **9.2. Second Step:**

- The official contacts the Supply Chain Management official and gives all details.
- The Supply Chain Management official completes the after hours booking register.

### **9.3. Third Step:**

- Supply Chain Management official gives approval number to the travel agent to enable the latter to confirm the bookings.

### **9.4. Fourth Step:**

- The official, on return from official trip, forwards a completed and approved travel form to Supply Chain Management section within 24 hours of the day on which the official has returned.
- If not received within 5 working days all expenditures will be deducted from the official's salary.

## **10. INTERNATIONAL TRAVEL**

- International trips will be approved by the HOD, MEC and Cabinet at least 6 weeks in advance.
- The purpose of the trip must be related to the strategic objectives of MDoE.
- When a bigger group is to attend the same event, not more than 2 (two) of the group should be on the same flight.
- An executive council memorandum should be compiled and approved before departure.

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**11. POLICY REVIEW**

The policy will be reviewed as and when necessary.

**12. APPROVAL**

Policy approved:



**MOC MHLABANE (MRS)  
HEAD OF DEPARTMENT**

DATE: 06/10/2010