

**THE ANGLICAN DIOCESE OF GRAFTON
MINISTRY UNIT PROCEDURES**

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| SUBJECT: MINISTRY TRAVEL AND ASSOCIATED EXPENSE REIMBURSEMENT | | PROCEDURE REFERENCE NUMBER MUP-003 |
| DATE APPROVED 1 September 2022 by Bishop-in-Council | | REVISION NUMBER Revision 1 Replaces original of 3 March 2016 |
| POLICY IMPLEMENTATION DATE Revised policy – immediate New reimbursement from 1 January 2025 | REVIEW Annual review of reimbursement rates; 3 yearly review of procedure | RESPONSIBLE FOR REVIEW Stipends and Allowances Committee |

1.0 PURPOSE

Participation in the life of the Anglican Diocese of Grafton can involve travel as part of ministry, duties of an office, or for other purposes. This procedure provides a basis for fair consideration of the arrangements relating to travel and the expenses involved.

2.0 SCOPE

This procedure is applicable for travel that is associated with the work or ministry of the Anglican Diocese of Grafton, including parish ministry, but the reimbursement of expenses is not applicable where:

- Travel has not been appropriately authorised prior to departure;
- Travel expenses go beyond reasonable costs for the journey and fail to account for reasonable joint travel arrangements; or
- Travel is for annual leave or other personal circumstances except where approved in writing.

Where a person's duties relate to a Body Corporate of the Anglican Diocese of Grafton (e.g. Anglicare North Coast, a Diocesan school) the procedures of that organisation will apply in place of this procedure, except for the submission of a travel declaration.

Travel on behalf of The Corporate Trustees of the Diocese of Grafton is subject to this procedure.

3.0 CONDITIONS

3.1 Provision of vehicle

A vehicle is necessary for the ministry of the Incumbent

- (a) Each Parish is to consider providing a vehicle for the use of the Incumbent.
 - (i) When procuring a vehicle for the use of the Incumbent, churchwardens shall use the guidelines in Schedule 1;
 - (ii) Where the Incumbent has an existing arrangement with a parish for reimbursement of their own vehicle, such arrangements are not to change unless with the agreement of the Incumbent;
 - (iii) Where a disagreement arises about the suitability of a vehicle or intended vehicle, such disagreements may be referred to the Bishop-in-Council Executive, if unable to be resolved locally.
- (b) Vehicles may be provided for other ministers subject to agreement with the incumbent and the churchwardens of the parish.

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- (c) For stipended clergy, where they and the churchwardens agree that personal circumstances or the duties are such as do not warrant the provision of a vehicle, the parish shall provide such travelling allowance (or expenses reimbursement) to cover costs associated with travel on behalf of the parish.

3.2 Parish vehicles

Where the parish owns the vehicle¹ the following shall apply:

- (a) The parish shall keep the vehicle in good running order at its expense, and provide all operating expenses.
- (b) The parish shall maintain break-down service membership with the NRMA or a similar service.
- (c) The person to whom the vehicle is provided shall be responsible for ensuring that it is presentable, regularly maintained and generally cared for.
- (d) The person to whom the vehicle is provided shall have the use of the vehicle at all times for parish and personal use², and for travelling outside the parish, including travel on annual leave; provided that:
 - i. agreement with the Churchwardens be obtained prior to using the vehicle on annual leave over long distances, or over rough terrain, or towing a caravan
(Note: Agreement shall only be withheld if the vehicle is unsuitable for the trip.); and
 - ii. the person pays for fuel when the vehicle is used for annual leave.

3.3 Privately owned vehicles

Where the diocesan administration or parish pays a vehicle allowance for the use of a privately owned vehicle, the following shall apply:

- (a) The vehicle owner shall ensure that their vehicle is reliable, roadworthy, registered and adequately insured and fit for the journey to be undertaken;
- (b) The rates for reimbursement of motor vehicle expenses in this Procedure which are considered to adequately cover the fuel, upkeep and maintenance costs attributable to the travel undertaken:

A. Full-time Stipendiary Clergy

A vehicle allowance is provided consisting of a fixed component and a variable component based on kilometres driven in cases where no vehicle is provided with the appointment. The applicable rate of reimbursement is in Schedule 2.

¹ All vehicles must be registered in the name of The Corporate Trustees of the Diocese of Grafton. Parishes are exempt from Stamp Duty provided the vehicle is retained for at least 12 months. Parishes need to include vehicle details on their annual insurance declaration to ensure that full motor vehicle insurance cover is maintained.

² Includes use by family members in compliance with this regulation except where personal use causes a conflict with ministry duties

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Payment of vehicle expenses may be made either:

- a. In regular monthly increments based on an agreed estimate of distance expected to be travelled over the year. The agreed estimate is established prior to the commencement of the year but can be reviewed if the actual motor vehicle travel appears to be substantially different from that expected.
- b. Each month based on the actual travel in the previous month.

The actual method of payment should be by agreement between the clergyperson and the churchwardens. A log book (or equivalent) should be kept in both cases.

The usual journey from home to or from the clergy's place of work should not be included in the claim for reimbursement.

Other appointments with a similar reliance on motor vehicle use may adopt the principles and rates of reimbursement provided for full-time stipendiary clergy.

B. Occasional Travel

Where persons (other than full-time stipendiary clergy) are required to use their own vehicle for approved travel for ministry or official duties, a vehicle allowance is payable. The applicable rate of reimbursement is in Schedule 2.

For employees covered by an industrial award, the terms of the award are to take precedence.

In such cases, payment is made after completion of the trip after submitting a travel reimbursement form.

Travel within the person's own town or city area is generally not reimbursed.

3.4 Hire Cars

The decision to use a hire car should be based on whether it is a practical and cost-effective travel option. Vehicle selection should also be based on practicality and cost instead of status.

If the trip is covered by Travel Insurance, there will be no need to pay for a reduction of the car hire company's standard excess as this will be covered under the terms of the Travel Insurance held by the Diocese.

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3.5 Other obligations relating to driving

- (a) Those driving in connection with their role or duties for the church shall:
- Have a current driver's licence valid in New South Wales and for the vehicle being driven;
 - Show courtesy to other road users at all times;
 - Drive with a safe and cautious approach;
 - Comply with all road and parking rules;
 - Ensure that they have no medical or physiological reason that would prevent them from driving safely;
 - Ensure that they are not intoxicated or impaired by alcohol, medication or other substances while driving;
 - In the event of an infringement, the driver shall be responsible for any fines or penalties involved.
- (b) No driver shall convey children in a vehicle as part of church duties where the child's parent or guardian is not present unless they have a current Working With Children Check registered with the relevant parish or group and unless written permission has been received from a parent (or guardian) of each child travelling.
- (c) Drivers on a Learner's Permit shall not drive in connection with their role or duties for the church³.
- (d) Drivers on a Provisional Licence driving in connection with their role or duties for the church shall not carry passengers with the exception of family members. The appropriate Provisional Licence sign shall be displayed.
- (e) Drivers are to complete an Authority to Drive Motor Vehicles Form (Attachment 1) prior to driving in connection with their role or duties for the church.

3.6 Other modes of travel

The mode(s) of travel used for a journey (e.g. aeroplane, train, bus, ferry, taxi) shall be chosen on the basis of practicality and cost-effectiveness. The modes of transport need to be declared as part of the Travel Authorisation.

Travel by chartered aeroplane or helicopter requires declaration for insurance purposes prior to any booking being made. Use of this mode of transport will not be permitted if insurance cover is unavailable. Application for insurance cover for a chartered flight shall be sent to the Diocesan Insurance Officer by email to insurance@graftondioocese.org.au

³ This does not apply to family of a full-time stipendiary clergy who have been provided with a vehicle for their role however driver training should be organised to avoid any conflict with ministry duties. This is subject to adequate insurance cover.

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3.7 Meals and Accommodation

Persons on authorised travel as part of their role or duties for the church are entitled to reimbursement of reasonable expenses incurred for accommodation and meals in addition to transportation costs. Travellers should be conservative in choice of accommodation and meals.

The use of per diem (daily) allowances is discouraged.

In the case of clergy carrying out ministry duties as visiting clergy to parishes other than their own, reimbursement of the cost of accommodation and meals should be met by the requesting parish or supplied free of charge by the parish, friends or family.

3.8 Travel Authorisation

The appropriate authorisers of travel are:

| <u>Organisation</u> | <u>Authoriser</u> |
|---|--|
| Parish | |
| - Churchwarden | Another Churchwarden or Incumbent or Locum |
| - Other person | Churchwarden |
| Diocesan Administration | |
| - Ministry purpose | Bishop (or as delegated) |
| - Registrar travel | Bishop (or as delegated) |
| - Staff travel | Bishop, Registrar or delegated |
| - Synods/Corporate Trustees/Councils/Committees | Bishop, Registrar or delegated |

Diocesan Bodies Corporate As per authorisation schedule of the organisation

Where travel is conducted for more than one parish or entity, authorisation is required from each with a prior agreement of how expenses will be shared.

3.9 International Travel

For international travel on behalf of the Diocese or one of its entities, each traveller shall complete a Travel Declaration (Attachment B) and submit it to the parish or diocesan entity that is reimbursing the travel. The completed form is to be sent to the Diocesan Insurance Officer by email to insurance@graftondiocese.org.au

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3.10 Reimbursement

Reimbursements require the completion of an Expense Reimbursement Claim Form with originals or copies of tax invoices for any fares, accommodation or meal to be reimbursed.

Reimbursement claims for travel expenses are to be sent to the body responsible for the expense. In most cases this is the same body as represented by the authoriser of the travel.

3.11 Special Arrangements

- (a) The travel policies of incorporated Diocesan Bodies Corporate override this procedure for all travel on behalf of that entity, except for providing a Travel Declaration to the Bishop's Registry for chartered flights or international travel.
- (b) For parishes, the arrangements for how travel and/or vehicle expenses are reimbursed can be varied to suit individual circumstances. Where this is required, it shall be done via a clear written agreement⁴ signed by the traveller and the organisation's authorisers and lodged with the Bishop, Registrar or delegate. No agreement will be current until the Bishop, Registrar or delegate confirms approval of the arrangements.
- (c) No special arrangement shall reduce the safety or risk management provisions of this regulation.

⁴ Can be incorporated into an employment contract or a ministry covenant

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SCHEDULE 1 Guide for Selection of Parish Motor Vehicles

The following factors are to guide Parishes when procuring a motor vehicle that is to become the vehicle regularly used by the Incumbent or another minister.

Age of vehicle:

At the time of purchase a vehicle should be in very good condition and not more than 2 years old and within the new car warranty period. New or near new vehicles are preferred.

At the time of disposal, the vehicle should be not more than 5 years.

Turnover of vehicles should take into account the condition of the vehicle, its service history and distance travelled. Vehicles that are used frequently on rough roads or have high usage should be disposed of at a younger age.

Environmental

Vehicles with better environmental credentials are preferred with electric and hybrid vehicles given strong consideration.

Where petrol fuelled vehicles are considered, the vehicle selected should have a manufacturers advertised fuel economy not greater than 9 litres per 100 kilometres for a combination of town and highway driving.

Type of vehicle:

A sedan or hatch vehicle in the medium car class is considered appropriate for the majority of Parish circumstances. In 2022, the medium car class included, for example, Hyundai Sonata, Mazda 6, Skoda Octavia, Subaru Liberty, Toyota Camry and Volkswagen Passat. These example vehicles have petrol engines with capacities ranging from 1.8 to 2.5 litres.

Selection of a vehicle should take into account:

- affordability - including the availability of fleet discount and prospective trade-in value
- passenger capacity – suitable to carry the driver and three adult passengers in reasonable comfort on a trip of up to 6 hours;
- servicing – access to service centres and expected cost of servicing
- reliability
- safety
- running costs
- access to fuel type

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Choice of a different size or style of vehicle should be based on genuine needs rather than the driver's or churchwardens' preferences. For example, where the vehicle is to be used to access properties on unsealed roads a higher clearance vehicle such as Nissan X-trail, Subaru Forrester or Toyota RAV 4 may be more appropriate.

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SCHEDULE 2 Rates for reimbursement for motor vehicle use

Rates applicable from 1 January 2025 (as approved by Bishop-in-Council 12 December 2024):

- A. Use of private vehicle as a requirement of role
Allowance
Fixed component: \$9,715 per annum
Variable component: 32 cents per kilometre
- B. Occasional use of private vehicle
Allowance
Fixed component: Nil
Variable component: 88 cents per kilometre

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ATTACHMENT A



ANGLICAN DIOCESE OF GRAFTON

Authority to Drive Motor Vehicles

Full Name: _____

Address _____

Declaration

In accepting nomination as an authorised driver of motor vehicle owned, leased or hired by The Corporate Trustees of the Diocese of Grafton (Anglican Diocese of Grafton) or one of its bodies Corporate, I hereby declare:

1. I am the holder of a current motor vehicle driver's licence and have no knowledge of any current circumstances which could cause its cancellation or suspension.
2. I have not been refused motor vehicle insurance or continuance thereof by an insurer.
3. I have no known medical or physiological condition that prevents me from driving safely.
4. I have read and understand the procedure MUP-003 (Ministry Travel and Associated Expense Reimbursement) and agree to act in accordance with the conditions contained in the regulation.
5. I undertake to inform the Anglican Diocese of Grafton (and any of its parishes or organisations for which I drive) as soon as practicable if there is a change in my circumstances affecting my compliance with MUP-003. This would include (but is not limited to):
 - Loss or suspension of driver's licence;
 - Change of licence conditions;
 - Adverse change of health affecting driving ability;
 - Being denied motor vehicle insurance cover.

Signed: _____

Date: _____

Employee Licence Details

State Issued: _____ Licence No: _____

Licence Class: _____ Expiry Date: _____

You must attach a copy of your current drivers licence to this form

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ATTACHMENT B



ANGLICAN DIOCESE OF GRAFTON

Travel Declaration

Parish or Organisation Name: _____

Traveller's Full Name: _____

Traveller's Home Address: _____

Traveller's Contact Details

Phone: _____ Mobile: _____

Email: _____

Detail of travel

Destination: _____ via _____

Travel dates: From _____ to _____

Reason for travel: _____

Mode(s) of travel: _____

Note: Damage to electronic equipment is not covered by insurance when travelling by aircraft, bus or waterborne vessel unless it is carried as personal cabin baggage.

Accompanying Persons _____

(Please note that any accompanying person will need to complete a Travel Declaration if their travel is to be authorised.)

Traveller's Signature: _____ Date: _____

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Signed by Parish Churchwarden: _____
(or signed by person with authority to approve travel for the organisation)

Return prior to departure to insurance@graftondiocese.org.au