



Information for PLD Providers

Centrally Funded PLD Travel Policy

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3.0	04/07/18	<ol style="list-style-type: none">1. Tier 7 budget update2. Travel pre-approval online update3. Rate GST update

Document signoff

Role	Name/Title	Approval	Signature
Senior Manager	Chris Harwood	07/06/17	
Programme Manager	Dean Stanley	04/07/18	

Introduction

This document refines and provides operational guidance on the use of the Centrally Funded PLD Travel Policy as originally provided in the Request for Proposal documentation in August 2016.

All travel expenses incurred when delivering Central Funded PLD must comply with the intent of the following policy and calculation framework.

Guiding Expectations:

The Policy is set around three primary expectations:

1. The Ministry of Education is expected to make sure the use of finite funding is as effective and efficient as possible.
2. The PLD system is expected to display good justification and value for money expended where travel is required.
3. Providers of PLD services are expected to actively keep travel expenditure to a minimum level.

Travel policy summary:

The PLD travel policy uses defined rates of travel and sets expectations of minimum delivery of 'contact hours' based on the nature and extent of the travel expenditure. This meets the expectation to justify expenditure and value whilst still allowing the sector access to any skills and specialisations they may require.

The PLD redesign aims to strengthen local expertise. This policy complements the new system by creating incentives for the sector to use local facilitators.

Incentives for local facilitator selection include more flexible delivery options, direct access and more of the available resource being applied to actual PLD delivery time.

Despite the local incentives the policy still provides a fair and equitable system to reimburse providers for travel expenditure. However the minimum delivery must be adhered to by the sector in planning activities.

To ensure providers have the ability to deliver the required services, and create efficiencies to reduce expenditure, the travel policy uses two methods:

1. Flexibility across travel expense components

The maximum values available are used to calculate a funding level and ensures that the funding is available to that level.

Using the travel policy calculation framework as a guide the provider may then have the flexibility within the travel expenses line items (not including travel time) to use an under and over system based on actual and reasonable costs (all records must be retained for future audit purposes).

2. Additional nights:

The initial calculation is made on the basis of each travel tier as described however, where appropriate, tiers include the ability to add additional nights. Where available and used, the tier value can be increased on an additional per night basis as defined in the travel policy calculation framework below.

Providers are expected to use any other reasonable means to ensure that the travel expenditure is minimised. Examples include: facilitators combining travel, arranging multiple PLD appointments in one trip, using or partially using local facilitators.

The travel policy calculation framework:

Table one:

Tier	Description	Minimum Delivery Conditions per claim	Additional Nights
Tier 1	<ul style="list-style-type: none"> No Restriction 	<ul style="list-style-type: none"> No minimum requirement 	<ul style="list-style-type: none"> N/A
Tier 2	<ul style="list-style-type: none"> Driving 50km to 100km each way Maximum travel time of 2 hours per claim No accommodation or meals available. 	<ul style="list-style-type: none"> Minimum of 4 contact hours delivered 	<ul style="list-style-type: none"> N/A
Tier 3	<ul style="list-style-type: none"> Driving 101km to 200km each way Maximum travel time of 4 hours per claim Accommodation & meals available 	<ul style="list-style-type: none"> Minimum total of 8 contact hours delivered Minimum average 4 contact hours delivery per day 	<ul style="list-style-type: none"> Accommodation & Meals (up to 4 nights)
Tier 4	<ul style="list-style-type: none"> Driving 201km – 300km each way Maximum travel time of 6 hours per claim Accommodation & meals available 	<ul style="list-style-type: none"> Minimum of 8 contact hours delivered Minimum average 4 contact hours delivery per day 	<ul style="list-style-type: none"> Accommodation & Meals (up to a total of 4 nights)
Tier 5	<ul style="list-style-type: none"> Short return flights Maximum travel time of 2 hours per claim Accommodation & meals available Destination Taxi/rental car 	<ul style="list-style-type: none"> Minimum average 4 contact hours delivery per day 	<ul style="list-style-type: none"> Accommodation & Meals (up to a total of 4 nights) Airport parking Destination transport
Tier 6	<ul style="list-style-type: none"> Return flights Maximum travel time of 4 hours per claim Accommodation & meals available Destination Taxi/rental car 	<ul style="list-style-type: none"> Minimum of 8 contact hours delivered Minimum average of 4 contact hours delivery per day 	<ul style="list-style-type: none"> Accommodation & Meals (up to a total of 4 nights) Airport parking Destination transport
Tier 7	<p>BY NEGOTIATION</p> <ul style="list-style-type: none"> Travel in excess of 8 hours (e.g. Stewart Island, Chatham Island, Far North and Southland) 	<ul style="list-style-type: none"> As negotiated Minimum average of 4 contact hours delivery per day 	<ul style="list-style-type: none"> As negotiated

Note: Where available accommodation is to a maximum of 4 nights in any one claim (i.e. if there is 1 night included).

Note: Please be advised that when requesting pre-approval for travel at Tier 7, a Tier 7 travel budget will have to be produced before a Statement of Work (SOW) can be generated.

Travel calculation rates:

The following rates apply to any claims made under the travel policy calculation framework above

Please ensure that you follow the framework carefully to ensure you understand the components available.

Table two:

Expense	Rate (excl. GST) (chargeable to maximum value for tier per claim)
Travel time	50% of the facilitators agreed hourly delivery rate

Note: Agreed facilitator delivery rates exclude GST.

Table three:

Expense	Travel policy rates (incl. GST) (chargeable to maximum value for tier per claim)
Driving rate	\$0.73 per km
Accommodation	Maximum \$143 per night
Meals	Maximum \$50 per night
Flights	Maximum \$500 per return flight
Airport parking	Maximum \$50 per day & additional night (only available with flights)
Taxis	Maximum \$50 per day & additional night (not available with 'Rental car')
Rental car	Maximum \$120 per day & additional night (not available with 'Taxis')
Fuel (Rental car)	Maximum \$20 per day & additional night (with 'Rental car' only)

Note: Travel policy rates include GST.

When using the framework the Ministry will always ensure that the maximum available value is available for the selected tier description. However the provider is still expected to display a commitment to reduce travel expenditure for these services.

The following table provides the available funding in each tier. The value of travel time would be calculated by multiplying the travel time by half of the facilitator's agreed hourly rate.

Table four:

Tier	Description	Standard Expenses*	Travel Time Cap (Hours)	Travel Time Rate	Minimum Delivery (Contact Hours)	Expenses per Additional Night
T1	Less than 50km	\$0	N/A	N/A	N/A	\$0

T2	Drive 51 – 100km	\$146	2	½ hourly rate	4	\$0
T3	Drive 101- 200km	\$485	4	½ hourly rate	8	\$193
T4	Drive 201km +	\$631	6	½ hourly rate	8	\$193
T5	Short flight	\$690	2	½ hourly rate	4	\$383
T6	Flight	\$1073	4	½ hourly rate	8	\$383
T7	By negotiation	TBC	TBC	½ hourly rate	TBC	TBC

**Standard expenses is the maximum available funding per tier (excluding any additional nights)*

*Note: this only represents the total values, the full calculations for reaching the available funding (including additional nights) is included as **Appendix 1**.*

Change control:

Amendments to the Travel Policy contained in the Request for Proposal document (August 2016):

The rates and calculations from the original document remain the same however this policy amends the original document as follows:

- One additional tier has been added (Tier 5 – Short flight) to allow for short air journeys (e.g. Wellington to Nelson).
- The tiers have been re-numbered.
- The largest tier has been made 'by negotiation' to allow flexibility and is only expected to operate by pre-approval (now Tier 7 – By negotiation)
- The driving rate has been updated from \$0.72 per km to \$0.73 per km for journeys after the 1st April 2017. Table three reflects the updated rate.

Claiming travel expenses:

Travel expenses are linked to each Statement of Work for a PLD appointment.

Actual travel expenses within agreed tier limits must be included in the six monthly invoice cycles for that appointment.

Any invoices out of normal payment cycles must be negotiated and by agreement with the Ministry of Education Relationship Manager.

The Relationship Managers may seek early submission of travel expenses towards the end of the financial year (May to June each year).

Each travel claim included in an invoice must contain:

- Statement of Work reference number
- For each facilitator:
 - The total value of the travel expenses claimed
 - The total value of travel hours claimed
 - The number of visits made to the school, kura or Community of Learning (claims per period)
- The invoice must also include the following statement:

'It is confirmed that all travel expenditure contained in this invoice has met the 'minimum delivery conditions' as outlined in the Centrally Funded PLD Travel Policy'

All evidence of expenditure, records of travel and records of contact hours delivered must be retained for audit purposes.

Please note that travel time is only claimable on the Journey from the facilitator office location and the delivery destination and the corresponding return journey.

Online Forms:

We are moving some of our processes online – if you are looking to apply for travel pre-approval please use the form below.

- Travel Pre-approval Form - <http://services.education.govt.nz/pld/information-for-providers/travel-request>

Pre-approval:

Travel to locations inside a ‘home region’

Travel expenses incurred by facilitators working within their home region do not require pre-approval. However all claimed travel must comply with the PLD travel policy and calculations framework.

Travel to locations outside a ‘home region’

The PLD Panel Agreement (December 2016) specifies that any facilitator wishing to accept work outside their home education region should seek email approval from the Ministry of Education before accepting the appointment.

Pre-approval is only required once for each Statement of Work. Once approved the travel budget will be available for each instance of travel during the appointment.

PLD travel: pre-approval procedure:

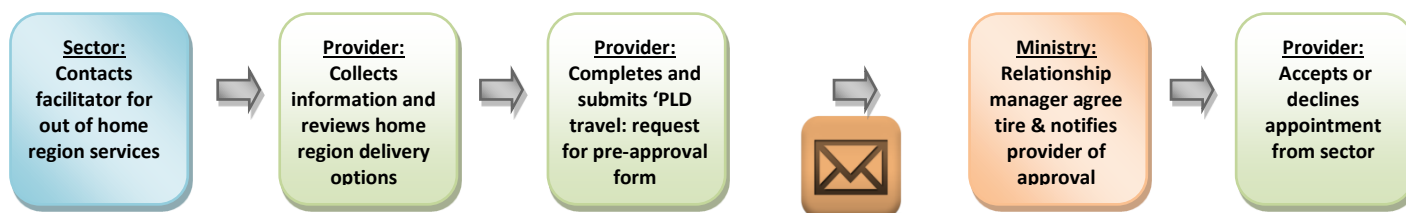
When requesting pre-approval for travel expenditure outside of home region the following must be completed:

The Provider must seek approval by email to

PLD.Providers@education.govt.nz

The email should attach the Ministry of Education ‘**PLD Travel: request for pre-approval**’ form. A copy of the form is included at the end of this document as **appendix 2**.

The below process map displays the high level steps for pre-approvals:



PLD.Providers@education.govt.nz

The Pre-approval request form

The 'PLD Travel: request for pre-approval' form will seek the following information from the provider:

Request information:

Date of request: *the date the form is submitted*

Request made by: *the person making the request*

Email: *the email address for the person making the request*

Tel: *the telephone number for the person making the request*

Request from (provider name): *the name of the provider organisation (as on contracts)*

School, Kura, Community of Learning information:

Type of recipient: *School, kura or Community of Learning*

Name of recipient: *the name of the school, kura or Community of Learning*

I.D. number: *the ID number of the school, kura or Community of Learning*

Proposed number of contact hours: *the number of 'contact hours' offered*

Reason for selection (*What is the school, kura or Community of Learning's reason for seeking the facilitator's out of home region services? – e.g. specialisation, availability, continuity*):

Facilitator details:

ACC number: *the accreditation number of the facilitator*

Name: *the name of the facilitator*

Office location: *the office location of the facilitator*

Delivery destination: *the delivery destination for the PLD*

Distance to destination (km):

Proposed travel tier: *the travel tier requested based on the PLD Travel Policy*

Additional notes: *Any other relevant information for the request*

Minimising cost and maximising efficiency:

What mechanisms are likely to be available to reduce cost of the travel for the proposed PLD (i.e. combining PLD appointments, sharing travel for multiple facilitators)?

Once received the Ministry will consider factors including:

- The school, kura or Community of Learning's reasons for selection of the facilitator
- The availability of suitable local expertise and whether it is reasonable to seek the skills and specialisation from outside the school, kura, Community of Learning home region.
- Effectiveness of the appointment (i.e. if a referral is for 4 hours only we cannot justify the longer term benefits of the expenses value)

The relationship manager will confirm the availability of travel funding as requested by return email notification.

Upon receipt of a delivery plan from a school, kura or Community of Learning which commissions the preapproved facilitators, a Statement of Work will be generated which includes confirmation of the relevant travel tier for each facilitator, and sets the expenditure cap for this work.

Where necessary during the assessment the relationship manager may contact the provider to discuss and agree a suitable pre-approval before confirmation notification is sent.

Working with Sector

Travel approved - Travel tier listed in the Statement of Work:

Once the provider organisation is pre-approved for travel they will engage with the school, kura or Community of Learning to complete the PLD delivery plan in the PLD Journal.

The facilitator will provide the appropriate tier number to the school, kura or Community of Learning to be recorded on the PLD Journal 'start' page. This will be checked against the Ministry of Education request log and included in the statement of work which is created when the delivery plan is submitted.

Travel not approved:

Where travel is not approved this means that there will be no centrally funded budget available for travel expenses for the PLD appointment described. However, it does not restrict the use and payment for the 'Contact Hours'. Accordingly the following may occur:

- The provider may decline the appointment
- The provider may accept the appointment with no travel claims available and use other means for the funding of travel

In circumstances where the appointment is accepted without centrally funded travel available then the 'Centrally Funded PLD Travel Policy' no longer applies.

Appendix 1: Calculation tables

Table five: Travel Policy Calculation Framework

Policy components and calculation framework rates:												Additional nights rates in red	
Description	Travel expenses											Travel time	
	Driving (km)		Driving	\$	per day (\$)				per night (\$)		Minimum	Hrs	% rate
	min	max	\$/km	Flights	Rental car	Parking	Fuel	Taxis	Acc	meals	contact hrs		
T1	Less than 50km												
T2	102	200	0.73								4	2	50%
T3	202	400	0.73						143	50	8	4	50%
T4	402	600	0.73						143	50	8	6	50%
T5	Short flight			500	120	50	20	50	143	50	4	2	50%
T6	Flight			500	120	50	20	50	143	50	8	4	50%
T7	Negotiated		TBC	TBC	TBC	TBC	TBC	TBC	TBC	TBC	TBC	TBC	50%

Tier maximum value calculations based on policy tier description																		
Description	Driving (km)		Driving	\$/claim	Per tier claim based on days				Per tier claim (Per night)		Min per claim	Travel expenses	Travel time available per claim			Additional nights: expenses per night in additional to claim expenses		
	min	max	\$/km	Flights	Rental car	Parking	Fuel	Taxis	Acc	Meals	contact hrs	Total \$	Hrs	% rate	Total \$	Total \$	Additional nights: components per additional night	Expenses per night
T1	N/A		0	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	N/A	\$ -	0	0	\$ -	\$ -	N/A	N/A
T2	\$ 74.46	\$ 146.00	0.73	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	4	\$ 146.00	2	50%	N/A	TBC	N/A	N/A
T3	\$ 147.46	\$ 292.00	0.73	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 143.00	\$ 50.00	8	\$ 485.00	4	50%	N/A	TBC	Acc, meals	\$ 193.00
T4	\$ 293.46	\$ 438.00	0.73	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 143.00	\$ 50.00	8	\$ 631.00	6	50%	N/A	TBC	Acc, meals, rental fuel, airport parking	\$ 193.00
T5	\$ -	\$ -	0	\$ 500.00	\$ 120.00	\$ 50.00	\$ 20.00	\$ 50.00	\$ 143.00	\$ 50.00	4	\$ 690.00	2	50%	N/A	TBC	Acc, meals	\$ 383.00
T6	\$ -	\$ -	0	\$ 500.00	\$ 240.00	\$ 100.00	\$ 40.00	\$ 50.00	\$ 143.00	\$ 50.00	8	\$ 1,073.00	4	50%	N/A	TBC	Acc, meals	\$ 383.00
T7	Negotiated		TBC	TBC	TBC	TBC	TBC	TBC	TBC	TBC	TBC	TBC	TBC	TBC	TBC	TBC	TBC	TBC

Table six: Total travel expense budget by number of nights (per tier lookup)

Tier	Description (km each way)	Travel time/rate		Total expenses available per claim based on No. of nights required					Min delivery	
		Max	Rate@	Start	1 night	2 nights	3 nights	4 nights	Per claim	Ave Per day
T1	Less than 50km	N/A	N/A	\$0	\$0	\$0	\$0	\$0	N/A	N/A
T2	Drive 51 – 100km	2	50%	\$146	\$0	\$0	\$0	\$0	4	4
T3	Drive 101-200km	4	50%	\$485	\$485	\$678	\$871	\$1064	8	4
T4	Drive 201km-300km	6	50%	\$631	\$631	\$824	\$1017	\$1210	8	4
T5	Short flight	2	50%	\$690	\$1073	\$1456	\$1839	\$2222	4	4
T6	Flight	4	50%	\$1,073	\$1073	\$1456	\$1839	\$2222	8	4
T7	By negotiation	TBC	50%	TBC	TBC	TBC	TBC	TBC	TBC	4



PLD Travel: Request for pre-approval (Form)

Administration

Date of request:	
Request made by:	
Email:	
Tel:	

Send requests to PLD.Providers@education.govt.nz

1. School, Kura, Community of learning details:

Type of PLD recipient (School, kura, CoL):	
Name of recipient:	
I.D. number:	
Proposed number of contact hours:	

What is the School, Kura or CoLs reason for seeking the facilitator's services (e.g. specialisation, availability, continuity)?

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2. Facilitator details:

Please provide the details of any facilitators you are seeking to have pre-approval for during the proposed PLD.

ACC no.	Facilitator name	Facilitator office location	Destination location	KM	Travel tier
Additional notes:					

3. Minimising cost and maximising efficiency

What mechanisms are likely to be available to reduce cost on the travel for the proposed PLD (i.e. combining PLD appointments, sharing travel for multiple facilitators)?

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