



UNIVERSITY TRAVEL POLICY

Effective immediately.

Introduction:	This document defines the policy for travel on University business, including overnight accommodation. The purpose is to achieve travellers' service requirements in the most safe, convenient, cost-effective and environmentally friendly manner. The policy applies to all staff spending University funds on travel and associated expenses regardless of the origin of the funding. This includes funds awarded in the form of research grants (Note that if travel is being funded by an external source, any travel rules which are applied by that source must also be followed (and in the event of conflict refer queries to the Director of Purchasing). Travel and/or accommodation costs borne by other parties where the source is not a research contract or similar should be recorded in the Gifts / Hospitality Register.
Objectives:	The objectives of the policy are: <ul style="list-style-type: none">• To obtain maximum value for money,• To ensure that expenditure on travel represents only the necessary and reasonable costs incurred,• To obtain pre-travel authorization, where appropriate, especially for significant expenditure
Scope and Application:	Council members, staff, contractors, consultants, external examiners, and any non-employee service providers where claiming expenses has been contractually agreed. Staff wishing to travel with family members or friends shall bear the entire cost of travel, accommodation and insurance for their family member/friend: see Private Travel below
Safety:	Staff intending any travel, especially outside the UK, should undertake a Risk Assessment. Where the Foreign and Commonwealth Office advise against travel the risk assessment should be discussed with your Head of Department and the University Health & Safety Manager in Occupational Health (0207 040 8009)
Passports:	When necessary, please ensure passports and visas (single or multiple entry) satisfy the travel requirements of the UK Immigration Service and the Immigration Services of the destination countries.
Budgets and Value for Money	Bookings must be justified, appropriately authorised and appropriately receipted. A value for money (vfm) judgment should be made prior to booking (e.g. cheap flights to airports distant from the destination which require considerable onward travel or overnight stays might not offer vfm). Consider the time required to navigate around unfamiliar air-terminals or large train stations.
Authorisation	<ul style="list-style-type: none">• A Travel Authorisation Form must be completed and authorised by the appropriate budget holder for any trip costing greater than £500.• When colleagues incur expenses for lunch/travel the bill should be paid by the most senior person.

Applicable Standards and Legislation	Nolan Committee Report – Standards in Public Life, Corporate Manslaughter, Health & Safety, HMRC Tax Liability
Compliance	Senior Officers, Deans, and Service Directors should take steps to monitor compliance with the policy in their areas. Internal Audit shall regularly audit compliance and report accordingly.
Air Miles, other personal benefits	Incentive schemes should not influence the purchasing decision. Air miles etc may be retained by the traveler for their personal use.
How to book:	Bookings should preferably be made using an SAP Purchase Order or a University Purchasing Card. Where this is not possible personal credit/debit cards or cash may be used and receipts claimed via the expenses process: please refer to: Reimbursement of Expenses: General Policies within the Finance Regulations. Consideration should be given to the likelihood for changes to arrangements: fixed fares may have “no change” stipulations.
When to book:	Travel should be booked as far in advance as possible to achieve value for money.
Where to book:	The University recommends a travel agent, details of which can be found on the University Marketplace https://uss.city.ac.uk/cms/purchasing_services/staff/marketplace.html however an alternative source may be used provided: <ul style="list-style-type: none"> • Value for money can be demonstrated, • Records are kept of the prices quoted • The agent used is fully ATOL bonded (4 digit ATOL number), note this will not be applicable for low cost airlines and funds dispensed will be at risk until you travel (note the PCard does not carry insurance)
Group activities/Conferences:	Where a group activity or conference specifies travel agents or hotels they may be used subject to the >£500 Travel Authorisation Form being duly authorised.
Corporate Responsibility:	Where possible staff should elect to travel on the most environmentally friendly mode and/or route
Insurance:	<ul style="list-style-type: none"> • Full details are available from the Chief Accountant who acts as the University’s Insurance Officer. • Staff travelling on University business are covered for normal travel requirements. Staff adding a vacation to the beginning or end of a business trip should ensure they (and their family member/friend) are appropriately insured especially for any hazardous sporting activity. • Staff’s own vehicles are NOT covered and are the responsibility of the staff member. • NB: the University insurance does not cover commuting to or from the place of work.
Oyster Cards:	Oyster card claims should be made using the TfL Oyster Card statement available from stations.
Departmental Oyster Cards	<ul style="list-style-type: none"> • £50 is the maximum credit allowed on any card, • A designated card holder should be appointed by the Head of Department • Cards should be signed in and out and a dated log of journeys kept, • Top ups should be recorded in the log,

	<ul style="list-style-type: none"> • Statements for the card should be obtained monthly and retained for 7 years. • If lost, the loser must reimburse the University for the balance on the card.
Private Travel	<ul style="list-style-type: none"> • Staff may arrange to extend a business trip for private travel at their own cost, • Staff may arrange for family members/friends to join them on business trips entirely at their own cost, <ul style="list-style-type: none"> ○ Where room rates are quoted irrespective of the number of occupants there is no additional cost and this is permitted, • Attendance by spouse, partner, companion for a bona fide business purpose must be approved by the Vice Chancellor or the Chief Finance Officer. <ul style="list-style-type: none"> ○ For a partner of the Vice Chancellor approval must be sought from the Chair of Council ○ For a partner of the Chief Finance Officer approval must be sought from the Vice Chancellor
Travel & Health and Risk Assessment	<ul style="list-style-type: none"> • Please visit www.city.ac.uk/healthservice/travel.htm • Please obtain advice on appropriate vaccinations etc from the Occupational Health Service who can offer a travel risk assessment particularly for staff involved in prolonged overseas trips. <ul style="list-style-type: none"> ○ In such circumstance a safety risk assessment should be conducted and checked with the University Health & Safety Manager on (0207 040 8009).
Cancellations	<ul style="list-style-type: none"> • Where possible trips should be cancelled in a timely fashion to achieve a refund or a credit, such refunds or credits must be paid to the University.

Modes of Travel

Air Travel	<ul style="list-style-type: none"> • Economy class for all flights under 6 hours duration, • Business class may be booked for flights over 6 hours duration at the budget holders discretion, where Premium Economy is available then this should be booked as opposed to business class, • First class travel is not allowed (anyone travelling First Class will be required to repay the excess cost to the University and may be subject to disciplinary action),
Cars	<ul style="list-style-type: none"> • Public transport shall be used wherever possible, • Private car usage must be preauthorized, the car must be road worthy, reliable, presentable and insured for “business use”. • Hire cars should normally be used unless it is considerably cheaper to use a private vehicle, notwithstanding the point above, • The University has a preferred vendor list for hire cars available from the University Marketplace https://uss.city.ac.uk/cms/purchasing_services/staff/marketplace.html • Local hire is allowed where it is cheaper than the University preferred vendor. • Group B cars will normally be requested, in exceptional circumstances a budget holder may preauthorize a more expensive car group.
Mileage and other Allowances:	<ul style="list-style-type: none"> • £0.32 per mile up to 10,000 miles, thereafter £0.25 per mile (due to IR regulations) • The London Congestion Charge (or similar) is not claimable unless it is absolutely essential to bring a car into the charging zone. • Home to work/work to home is not expensable.
Rail:	<ul style="list-style-type: none"> • Local rail and tube fares can be claimed through the expense process, • Internet booking in advance may achieve best value for longer distance rail travel: staff should book in advance to achieve lower fares, • Staff should travel standard class • If fixed time tickets are purchased journey insurance should also be purchased.
Bus:	<ul style="list-style-type: none"> • Bus fares can be claimed through the expense process using the ticket or Oyster Card Statement as receipt.
Taxis:	<ul style="list-style-type: none"> • Taxis may only be used between University locations by exception and the claim in these cases shall be limited to £10. • Where possible public transport should be used; taxis should only be used where there is genuinely no public transport alternative or staff are required to travel late at night. • Claims should not normally be for more than £20. • Taxi fares must be receipted and claimed through expenses • For London trips please use the Marketplace vendors • Use of black cabs when hailed is permitted • Please beware of waiting times which may be charged should the taxi have to wait prior to the journey. • Note commuting travel is not covered under the University insurance • Private journeys cannot be expensed • Car hire might be an alternative (if it is safe to drive in that country) if there is to be considerable travel

Accommodation & Subsistence:

<p>Hotel Reservations:</p>	<ul style="list-style-type: none"> • Where possible Marketplace vendors should be chosen • Hotels should be UK 3 Star or equivalent • Exceptions to the above rule: • Where safety may be an issue then a higher grade hotel may be chosen • When attending a conference which nominates a higher standard
<p>Subsistence:</p>	<ul style="list-style-type: none"> • Values below include VAT and any local taxes: • Breakfast £10.00 (business travel or a home departure prior to 06.00hrs), • Lunch £15.00 (can only be claimed if lunch is not provided) • Evening Meal £27.50 (can only be claimed for overnight stays or home returns after 20.00hrs) • Nightly Incidental Expenses: £5.00 fixed rate to cover personal phone calls, coffee in transit, newspapers etc: no receipt required. • Essential business phone calls or connections to the University network may be claimed through the expenses process. • Dry cleaning and/or laundry may be claimed if trip exceeds 4 days or when the trip duration has been extended. • Other than for the Nightly Incidental Expenses receipts must be produced: no receipt: no claim. <p>The following may not be claimed:</p> <ul style="list-style-type: none"> • Personal phone calls • Entertainment unless approved in advance • Meals consumed by a family member or friend.



Travel Policy Quick Reference Guide

Any Travel	<ul style="list-style-type: none">Any trip where the total cost is likely to exceed £500 per person, must be authorised in advance by the relevant Budget Holder (or if the Budget Holder is the traveller, the Budget Holder's Line Manager)
Air Travel & International Train Travel	<ul style="list-style-type: none">Should be Economy Class unless flight / train journey exceeds 6 hours when business class can be used with Budget holder's authority; where Premium Economy is available then this should be booked instead of Business Class. First class air travel is never acceptable.
UK Travel	<ul style="list-style-type: none">Usually by train in standard class or by bus / coach (for environmental and cost reasons)Can be by air if cost effective versus rail / coach.Hire car (group B) or own car (if roadworthy and insured for business etc) possible if clear business case exists.
Taxis	<ul style="list-style-type: none">Between University locations by exception: such claims capped at £10.Otherwise claims for general taxi travel should not normally exceed £20.
Hotels	<ul style="list-style-type: none">Should be booked per guidance on Purchasing Services Marketplace web page.
Subsistence	<p>Max Claims as follows;</p> <ul style="list-style-type: none">Breakfast £ 10.00 – can only be claimed if required to travel on business and leave home before 6amLunch £15.00 – can only be claimed if no suitable staff canteen facilities exist in visited location and no lunch is otherwise providedEvening Meal £27.50 – can only be claimed when staying a night away from home or if travelling on business and arriving home after 8pmNightly Incidental Expense payment - £5.00 fixed rate – can only be claimed when staying a night away from home on business – covers personal telephone calls / cups of coffee in transit etc. No receipts required.Personal telephone calls of any value cannot be claimedThe above values are all inclusive of VAT or any other local taxes
Private Travel	<ul style="list-style-type: none">Extension of business trips for personal reasons to be paid for in full by the staff member – there could also be income tax implications in doing this.Also any persons accompanying a staff member on a business trip must pay all costs themselves.In both cases insurance should be arranged by the travellers for the private travel at their own expense.Commuting between home and the University may not be claimed.
Conferences	<ul style="list-style-type: none">If a package for attendance and accommodation is offered, this can be used. If large numbers of people from City are attending, a discount should be negotiated.
General	<ul style="list-style-type: none">Safety is paramount; any issues should be discussed with the University Health & Safety Manager in advance of travel.Receipts MUST be provided for all claims (except Nightly Incidental Expenses)University recommended travel service providers should be usedAll claims must be reasonable and justifiableBest value for money should always be obtainedThe rules relating to the expense claims process applies