



Travel Subsistence and Expenses Policy

Operations Board Sponsor:	CFO
Senior Owner:	Head of Procurement
Approving Committee/Body:	Operations Board
Last Approved:	01/03/2016
Next due for review:	Dec 2019 Dec 2021
Brief Summary of Purpose:	To ensure a travel, subsistence and expenses policy is in place which ensures value for money is achieved, whilst ensuring the safety of University employee's at all times.
Notes:	

Note: unless otherwise stated, this corporate policy applies to all LSBU workers.

TRAVEL, SUBSISTENCE AND EXPENSES POLICY

Effective Immediately

Introduction	<p>Travel by employees is often an essential element in delivering the University's corporate objectives. It accounts for a significant proportion of the University's running costs, and through this policy, the University aims to achieve value for money through safe, convenient, cost-effective and sustainable travel.</p> <p>Work based activities commonly requiring travel include recruitment visits, attendance at conferences, business meetings, research and teaching overseas.</p>
Scope	<p>This policy applies to:</p> <ul style="list-style-type: none">• the University and any subsidiary companies• all forms of travel, including flights, rail, vehicle hire, taxis, accommodation and travel related services.• all employees and visitors to the University incurring travel and associated expenditure on behalf of the University.• all sources of funding and payment methods, including partly funded projects <p>This policy should be read in conjunction with the University's Travel Procedure and Expense Guidance documents.</p>
Aims and Objectives	<p>This policy aims to achieve value for money (doing the right thing, at the right price, the right way) through safe, convenient, cost-effective and sustainable travel. The following principles underly the policy approach:</p> <ul style="list-style-type: none">• all staff conduct themselves in accordance with the University's EPIIC values, working towards the best outcome for the University at all times• travel processes aim to create a trouble-free experience, enabling travellers to focus on delivering business priorities• staff safety is of paramount importance at all times• travel occurs only when necessary
Compliance	<p>Adherence to this policy is mandatory. Non-compliance constitutes a breach of Financial Regulations and may also result in the employee not being covered by the University's insurance policy. This would render them subject to disciplinary action and ineligible to claim expenses.</p>

Process

<p>Step 1: Needs Assessment</p>	<p>Travel will only be booked when it has been established that:</p> <ul style="list-style-type: none">• the travel is necessary• it supports delivery of the University's corporate objectives• it is proportionate• there are no practical alternatives to achieve the same outcome, such as video conferencing or reducing the number of travellers
<p>Step 2: Safety, Risk and Insurance</p>	<p>High standards of health and safety during foreign travel are paramount. They must override all other considerations, including academic and should be the result of thorough planning, care and common sense. Travel abroad may expose staff to a number of health and safety hazards arising specifically from the travel itself and/or the conditions of the country being visited. These may not be necessarily work related.</p> <p>The University has a statutory duty of care to protect, so far as is reasonably practicable, the health, safety and welfare of its staff and students whilst undertaking foreign travel. Managers, under the requirements of Regulation 3 of The Management of Health & Safety at Work Regulations 1999 must ensure that all trips and associated work activities are covered by a suitable and sufficient risk assessment and that appropriate control measures have been adopted.</p> <p>Adequate and effective management arrangements will be put in place by the University to protect the health and safety of its employees. All individual employees embarking on trips should take heed of the advice training, instruction and guidance given to them and act upon it. It remains the responsibility of each individual to give adequate consideration to their own health and safety and the likely conditions and situations they are likely to encounter, and to notify the University if additional arrangements need to be put in place. This includes insurance cover.</p> <p>Risk Assessments are integrated into the travel authorisation process and must be completed and kept up to date. High risk trips will require additional authorisation. Travellers and Line Managers must act proactively in response to any risk alerts relating to the trip at any stage.</p>

<p>Step 3: Authorisation</p>	<p>All travel plans outside the UK, or within the UK and involving flights must be approved in advance through the completion of a Travel Authorisation form. A full disclosure of the purpose of travel must be made when the travel is approved. This must include personal travel, recovery time and any non-University business related activity. Additional approvals may be required depending on the trip's level of risk.</p> <p>Only costs necessary to perform University business are to be approved.</p> <p>Non-flight travel in the UK must be approved by the Line Manager and Budget Holder in advance if applicable. Travellers should make full use of available public transport and opportunities for walking or cycling if appropriate.</p>
<p>Step 4: Booking</p>	<p>The University's Travel Buying team are to be used for all:</p> <ul style="list-style-type: none"> • travel booking relating to flights, rail, accommodation • travel-related services (including visas and additional passports) <p>Bookings are to be made in accordance with the following:</p> <ul style="list-style-type: none"> • no personal gain or loss to the individual • a total cost approach • travel must be in economy class, except for flights exceeding 6 hours, where Premium economy class may be booked. Business class may be booked for flights over six hours where Premium Economy is not available or where no rest period is possible and critical client facing work needs to be undertaken on arrival (advance approval is required through the Travel Authorisation Form.) First class travel is not permitted. Free upgrades may be taken if offered at checkin. • Employees must ensure that they meet all passport, visa and vaccination requirements for the areas they will be travelling to, and allow sufficient time for any additional services to be obtained if using the Travel Buying team services. <p>Travellers may make bookings direct with the agreed providers for the following forms of travel:</p> <ul style="list-style-type: none"> • vehicle hire • taxis • travel within London on Transport for London (TFL) operated services <p>Guidance on how and where to make these bookings are detailed in the University's Travel and Expense Procedure and Guidance documents.</p>

<p>Step 5: Subsistence and Expenses</p>	<p>Travellers are expected to exercise reasonable judgement regarding expenses incurred under this policy and to neither personally gain or lose financially from its implementation.</p> <p>Staff can claim expenses in line with the this policy, the University's Travel and Expense Procedure and Guidance documents and the University's Gifts and Hospitality Policy. This includes the cost of meals, entertainment, public transport within London, mileage for use of a private vehicle or bicycle and taxi's taken while abroad. Certain items are excluded and cannot be claimed through expenses including travel between home and work, the congestion charge and any of the services that must be booked through the Travel Buying team.</p>
<p>Step 6: Outcome Review</p>	<p>To enable effective management of the University's travel arrangements, review and feedback is required. On completion of their trip, travellers must complete the Travel Review section of their original Travel Authorisation Form.</p> <p>This records whether or not planned business objectives were met and captures feedback experiences from the trip that can be incorporated into future travel policies and procedures as part of a continuous improvement approach.</p> <p>Quarterly reports of all travel expenditure showing name, purpose, travel class, cost and outcome will be presented to Executive for review.</p>
<p>Amendments</p>	<p>The University reserves the right to make changes to these policies from time to time, and amendments will be circulated to staff in accordance with current employment law legislation. Updates may be by individual letter, memorandum, update to the document, or by means of notice/bulletin boards.</p>
<p>Definitions</p>	<p>See University's Travel and Expense Procedure and Guidance documents</p>
<p>Supporting Documentation</p>	<p>University's Travel and Expense Procedure and Guidance documents Travel Authorisation Form Gifts and Hospitality Policy University values</p>