

Staffordshire University

Travel

Policy and Procedures

1. Introduction

This Travel Policy and Procedures document is issued on 1st August 2005. It supersedes all other policies, procedures and manuals relating to travel currently in issue. It should be read in conjunction with the University's Financial Regulations and Employee Business Expense Claims Policy and Procedures.

This Policy and Procedures document is applicable to all employees of the University. It does not apply to self-employed persons or non University employees.

2. Policy

Travel costs and related expenses form a substantial part of the University's total expenditure. It is essential that they are managed efficiently and effectively.

The objective of this Policy is to ensure that employee travel arrangements are managed in a manner which:

- Has concern for the welfare and safety of employees travelling on behalf of the University
- Fulfils the needs of the University and the employee
- Ensures cost effectiveness

3. Definitions

The following definitions apply throughout this Policy and Procedures document.

University's Travel Partner – Key Travel Ltd.

4. General Procedures

The University's Travel Partner is responsible for the enforcement of this policy and for the provision of Management Information to the University.

It is a University requirement that all travel arrangements are made in strict adherence to this Travel Policy, in order that financial benefits are maximised.

If travel related arrangements are made through another agent, other than the appointed Travel Partner, the expenses incurred may not be passed by the University and the individual may be required to settle these accounts.

4.1 Traveller Profile Forms

All employees expected to travel abroad at least three times a year should submit a completed Traveller Profile Form to the Travel Coordinator who will forward it to the University's Travel Partner.

These forms are available from the University's Travel Partner and it is the responsibility of each traveller to keep the University's Travel Partner up to date of any changes to individual requirements. The information is held by the University's Travel Partner in the strictest of confidence in accordance with the provisions of the Data Protection Act.

4.2 Reservations and Ticket Request Procedure

For all travel enquiries and reservations contact your Travel Coordinator who will liaise with the University's Travel Partner.

Full information and advice will be available from University Travel Partner consultants dedicated to Staffordshire University.

An order number must be obtained from Financial Services and forwarded to the Travel Partner in order for reservations to be confirmed and for travel documentation to be raised and delivered.

PLEASE NOTE DOCUMENTATION AND TICKETS CANNOT BE ISSUED WITHOUT THE CORRECT ORDER NUMBER BEING RECEIVED.

Order numbers can be obtained via travel coordinators.

Travel documentation will be delivered to the travelling employee at the University unless alternative instructions have been received e.g. TOD (Ticket on Departure) or posted direct to home address.

4.3 Spouse's/Partner's/Children's Travel

The University will not meet any costs relating to the spouse, partner or child of an employee who accompanies the employee on a business trip.

4.4 Passports and Visas

The travelling employee is responsible, where applicable, for all passport and visa requirements. Facilities are available through the University's Travel Partner for the issue/renewal of passports and visas. Costs associated with the issue/renewal of passports must be met by the employee and are not normally reclaimable from the University. If this service is required, the travelling employee should contact their travel coordinator for details.

4.5 Medical Emergencies

If a medical emergency or hospitalisation occurs while an employee is travelling on University business it is suggested that contact is made with your Faculty or Department so that advice and/or support can be given.

5. Travel Procedures

5.1 Air Travel

Whilst the needs of the traveller will be taken into account all travel must be cost and time effective. The University's Travel Partner will discuss the best options with travelling employees whilst making the reservation. The University's Travel Partner is committed to our cost reduction programme and will offer the lowest cost practicable fare at the time of booking. A change of itinerary may be offered as a cost effective alternative.

Unauthorised requests will not be processed. All air travel must be in either tourist or economy class subject to the exceptions noted below.

Travelling employees must help the University's Travel Partner to provide an efficient and economical service by:

- Planning travel well in advance wherever possible – this will ensure the best prices are obtained.
- Planning travel with as much certainty as possible – 'open' tickets are expensive and should be avoided.
- Discussing travel arrangements with the University's Travel Partner – this may assist with your itinerary and will ensure that promotional fares are taken advantage of where possible.
- Specifying any non-standard criteria such as the need for flexibility – this will avoid late changes to bookings which can be costly.
- Utilising Apex fares wherever possible – this will reduce costs.

5.1.1 Group Bookings

Bookings required for groups of travellers will be obtained at the most economical fare.

5.1.2 Trading Down

"Trading down" of travel tickets; i.e., travelling by a lower class in order to claim an extra ticket for a guest of the employee, is not permitted and is considered to be a serious offence.

5.1.3 Business Class Air Travel

Only in exceptional circumstances may employees travel in Business Class and only if prior approval is granted by a member of the Executive in writing.

5.1.4 Air Travel Upgrades

Upgrades may only be made if available at no additional cost or if a Business Class fare is available at the Economy Class price.

5.1.5 Cancelled or Unused Tickets

Travellers must notify the University's Travel Partner of all cancelled travel arrangements which have been booked, returning all tickets immediately to ensure a credit is issued.

5.1.6 Frequent Flyer

Travellers may retain frequent flyer programme benefits. However, participation in these programmes should not result in any incremental costs to the University. The University will not be responsible for any tax liability, which may result from the use of these benefits.

5.1.7 Management Reports

The University's Travel Partner has been instructed to supply Air Fare Savings reports on a monthly basis. These reports show realised and missed savings. Reports will be forwarded to the University's Financial Director to ensure that the disciplines of the University's Air Travel Policy are adhered to.

5.1.8 Excess Baggage

Excess baggage caused by the necessity of taking items for business reasons must be authorised by the University and advised to the University's Travel Partner at the time of booking.

5.1.9 Lost Luggage

Losses in airports or in transit must be immediately reported to local authorities and documentation evidencing this must be obtained. Local authorities must be pressed for action. On return to the UK, travelling employees must report any losses to their Faculty or Department head.

5.2 Rail Travel

Tickets, whenever possible, should be arranged through the University's Travel Partner, via their website, and paid for using a University purchasing card.

All University staff will travel second class (with seat reservations where required) and are expected to investigate the possibility that day return tickets or "savers" may be available at lower cost.

In exceptional circumstances staff may travel first class provided prior approval is granted which must be given by a member of the Executive in writing.

5.3 Taxis

Travelling employees should avoid the use of taxis unless alternatives are not available or are impractical. The use of cost effective public transport or airport/hotel courtesy buses is encouraged whenever possible.

5.3.1 Taxis for late working

The University will cover costs of taxis for late working subject to the following conditions:

- The employee is required to work until after midnight.
- Late working is on an occasional basis only and is neither regular nor frequent.
- For these purposes regular means a predictable pattern e.g., every Friday night.
- For these purposes frequent means more than 60 occasions per year.
- Public transport is unavailable or it would not be reasonable to expect the employee to use it.

See Employee Business Expense Claim Policy and Procedures for information on reimbursement of costs.

5.4 Hotels

All hotel accommodation (other than where included in a conference package) must be booked through the University's Travel Partner. The company adopts a policy of restricting choice of hotels in key locations to take advantage of negotiated rates.

Payment for the cost of the room (including breakfast and VAT where appropriate) will normally be settled directly by the University through the University's Travel Partner. On checking out the employee will be required to settle all other charges. Reimbursement of such costs is subject to rules on allowable expenses as detailed in the University's Employee Business Expense Claims Policy and Procedures.

5.4.1 Hotel Rates

London	£70 per night
Other UK Cities	£65 per night
Other UK Location	£60 per night
<i>Above rates must include breakfast and VAT Single standard (with en-suite facilities)</i>	
Europe and USA	£80 per night
Far East and Australia	£80 per night

If a hotel is required which exceeds the authorised rates then **prior permission** must be obtained from the Financial Director.

5.4.2 Cancellations

Hotels booked through the University's Travel Partner will be guaranteed for late arrival. Travelling employees are responsible for cancelling reservations either by contacting the University's Travel Partner or dealing direct with the hotel. In the latter case, a 'cancellation reference' should be obtained as evidence of the cancellation.

'No show' charges are not reimbursable by the University and **the traveller will be held responsible for these costs.**

5.4.3 Miscellaneous Hotel Services

For information on miscellaneous hotel services which will be reimbursed by the University please refer to Employee Expenses and Benefits Policy and Procedures.

6. Incentives

University policy is to regard incentives as discounts on travel and any other service paid for by the University.