University of Liverpool Business Travel Policy

Introduction

Interaction and collaboration with colleagues and other stakeholders is an important part of our University operation. There are many different ways in which we can interact, some of which involve travel.

The COVID-19 pandemic has had a huge impact on the way we work, which is likely to continue into the future. It has highlighted the potential to move to more sustainable ways of working, including the ability to conduct most of our interactions without travel, in fact often without leaving our homes. We are introducing this travel policy at a time when change is inevitable, and we encourage all those who are considering the need to travel to think carefully about whether the travel is needed or whether the interaction can be successful in a different way, without the need for travel. Travel should be a last resort option. For those instances where travel does realise a significant benefit, we then need to think about how to travel in a sustainable way.

With this in mind, the University Business Travel Policy adheres to the following principles:

**Sustainability:** Although there are occasions when travel is essential, it is critical that all alternative options are considered prior to any travel being approved, in line with the University commitment to zero carbon.

**Value for money:** Travel is a significant cost to the University, and it is important to ensure that this money is disbursed in accordance with a policy and procedures aimed at fairness and good value for money. Again all alternatives to travel should be considered – the most cost efficient way to conduct our business is not to travel.

**HMRC compliance:** The University must demonstrate to HMRC that adequate controls are in place to ensure compliance with their rules and requirements for tax dispensations.

**Universal policy:** The University’s Travel Policy applies to all employees and students using University and other official funds to pay for travel.

**Health and safety:** The University has a duty of care to its staff and students under the Health and Safety at Work Act. To comply with the Act the University must ensure that it has adequate and effective management arrangements in place to protect the health and safety of its staff and students when travelling on University business.

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1 **Sustainability and carbon emissions**

It is recognised that travel, and in particular air travel, has a significant impact on pollution and carbon emissions, therefore consideration should always be given to how these negative impacts can be minimised. The most environmentally friendly option is always not to travel and we ask you to consider any alternatives to travel that are available. The value and versatility of platforms enabling online meetings and video conference calls has been proven to have a much lower impact both environmentally and financially, and therefore must be the preferred option wherever practical.

The University will measure, monitor and strive to minimise the environmental impacts of its business travel and adherence to this policy is key in enabling this.

2 **Definition of business travel**

To determine which journeys may be considered as business travel the following rules apply:

A business journey is one necessarily undertaken by an employee to carry out their duties for the University, or to attend training courses or conferences necessary for the performance of those duties. Travel between the permanent workplace and a temporary workplace or travel between home and a temporary workplace or travel between two temporary workplaces are all considered business journeys.

Business travel may also be undertaken by students who are required to travel for learning or research purposes as part of their programme of studies.

Subsistence incurred during a business journey may be reclaimed from the University within the rules and limits set out in the Expenses Policy. Further information can be found in the Payroll Office web pages (https://www.liverpool.ac.uk/intranet/hr/my-hr/information/policies/pay/expenses/)

3 **No personal gain**

The following rules apply for implementing the policy that employees should neither gain nor lose financially in relation to expenditure on business travel arrangements:

3.1 **Loyalty incentives**

The purchasing decision should not be influenced by any loyalty incentives such as airline mileage credits, hotel points/free nights or personal cash credit card discounts.

3.2. **Partner’s expenses**

A partner may accompany a member of staff for personal or business reasons. In instances of personal travel the University must not be charged for more than if the member of staff had travelled alone. Wherever possible in such cases the partner’s travel costs should be paid privately. If the invoice includes both private and official travel costs where the private costs are the greater the member of staff should settle the total invoice and reclaim the official element from the University. Private insurance must be taken out to cover the partner’s travel.
3.3 **Holidays linked to business trips**

Normally holidays should not be linked to business trips. Where there is a desire to do so prior approval must be sought from the individual’s line manager. Where it has been agreed that a holiday can be linked to a business trip the costs to the University must not exceed those that would have been incurred had there not been any holiday linked to the trip. An employee shall not claim any additional travel costs, subsistence or other expenses for days taken as holiday linked to a business trip. The University’s insurance policy will cover the full trip provided that the time spent on holiday is no more than 50% of the total period of the trip.

4 **Travel bookings**

All employees must adhere to the Business travel policy and the supporting travel booking procedures when incurring travel and associated expenditure on behalf of the University.

It is expected that all travel bookings should be made in advance of travel, excepting in any emergency situation.

Wherever possible, and subject to business needs, travel reservations should be made in good time in order to take advantage of cheaper fares or accommodation (eg off-peak, Apex).

The mode of travel should be the most cost-effective consistent with the business needs of the University and having regard to environmental impact.

Employees should travel and be accommodated in safety and reasonable comfort.

The University appoints one or more travel management companies (TMCs) as the designated University TMC. The appointment(s) are made following a selection process to enable the University to obtain the most favourable service and terms available. The appointed companies must be used for travel reservations, however there are a number of exceptions listed in the Travel booking procedures.

4.1 **Rail travel**

Rail travel should be booked in advance through an approved TMC to take advantage of early booking concessions. It is expected that Standard Class travel will normally be used, however there may be occasions when a first class ticket is cheaper. Any exceptions to standard class must be approved in advance through the relevant approval route as outlined in the procedures. [https://www.liverpool.ac.uk/procurement/intranet/travel_procedures](https://www.liverpool.ac.uk/procurement/intranet/travel_procedures)

4.2 **Air travel**

The least expensive class of travel must normally be used by all staff.

Examples of circumstances giving rise to exception to this requirement:

- When the flight requires six or more hours in the air, there is strong business reason for travelling non-standard class, and prior approval is obtained
- When the least expensive class is not available at the required time and flights at other times cannot meet the trip requirements
- There will be occasions when travel is already paid for by a third party or is to be reimbursed by a third party and in those instances the former does not apply. Consideration here must be given to whether there is any personal gain for either party.
The following table gives guidance on the class to be used for travel by air:

**Class of travel by air**

<table>
<thead>
<tr>
<th>Single leg journey time (scheduled flight time)</th>
<th>Class of travel</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 6 hours</td>
<td>Economy/Standard</td>
</tr>
<tr>
<td>Over 6 hours</td>
<td>Economy/Standard is the expected class of travel, by exception non-standard classes of travel may be used with prior approval as outlined in the procedures</td>
</tr>
</tbody>
</table>

Exceptions outside of the above – to be approved in advance through the relevant approval route as outlined in the procedures. [https://www.liverpool.ac.uk/procurement/intranet/travel_procedures](https://www.liverpool.ac.uk/procurement/intranet/travel_procedures)

### 4.3 Travel costs – direct payment by the University

All travel bookings must be supported by an authorised purchase order or a purchasing card. The appointed TMC will present invoices for all business travel bookings made through them and the University will pay these directly to the TMC.

A traveller should not be out of pocket by paying for their own travel requirements. In compliance with the University expenses policy, travel related expenditure should not be claimed back through the expenses process unless in exceptional circumstances where it is not possible to pre book and/or use corporate cards.

The University expenses policy can be found in the Payroll Office web pages. ([https://www.liverpool.ac.uk/intranet/hr/my-hr/information/policies/pay/expenses/](https://www.liverpool.ac.uk/intranet/hr/my-hr/information/policies/pay/expenses/))

If there are exceptional circumstances for making a travel booking other than through the University’s appointed travel management company, and settlement is to be made by a direct invoice to the University, then the University’s established purchasing procedures must be followed. This entails the use, in advance, of a University purchase order.

### 4.4 Vehicle hire

It will usually be more economical and environmentally friendly to use communal transport options than to use a private vehicle. Where business can be reasonably fulfilled as or more economically by using bus, train, shared taxi or other communal modes of travel, it is expected that these will be used above a hired, private or fleet vehicle. We recognise that this is dependent on social distancing advice at the time of travel, with the priority being the safety and wellbeing of our employees.

The University has a number of pool cars that can be used, the suitability and availability of these should be checked before hiring a vehicle. For single day road journeys exceeding a total of 150 miles, it is more beneficial to use a hired vehicle rather than a private one. Alternatively members of staff who use their own vehicles on University business must ensure that their
motor insurance policy covers them for business use. The University does not provide insurance cover for such use of personal vehicles. It is the responsibility of the individual to ensure that their vehicle is legally roadworthy with the relevant insurance, tax, MOT certificate (when applicable) and is suitable for business use.

Exceptions outside of the above are to be approved in advance through the relevant approval route as outlined in the procedures https://www.liverpool.ac.uk/procurement/intranet/travel_procedures

4.5 Accommodation

When employees are necessarily away from home on University business they are entitled to hotel or other suitable accommodation. Basic standards include cleanliness, privacy, personal security and the availability of breakfast.

Hotel accommodation both for UK and overseas should be booked through the chosen University service provider directly or via the approved TMC.

4.6 Travel insurance

The University will provide adequate travel insurance for all business trips (excluding motor insurance for travel in a private vehicle). In respect of overseas travel, this insurance is subject to specific approval prior to journeys being undertaken.

Details of the cover available can be found at https://www.liverpool.ac.uk/intranet/legal/insurance/

Insurance problems may arise where the Foreign Office advises against travel, if in doubt contact the Insurance section.

Employees are adequately insured through the University insurance policy when on business abroad or when travel in the UK requires an overnight stay. Additional insurance should not be necessary and cannot be reimbursed by the University. The University’s policy will also cover any private travel in conjunction with the business travel (accompanied by partner, extra days linked to the business trip, etc.) provided that the time spent on the private part of the trip is no more than 50% of the total duration of the trip.

4.7 Passports

Employees are responsible for ensuring that they have valid passports for overseas business travel. For any journey, the expiry date of the passport must be at least 6 months after the date of returning to the United Kingdom. It is generally expected that employees have passports for their own personal use, in which case the cost of the passport will not be refunded. However, if an employee has to obtain an additional passport solely for the purpose of travelling on University business, then the cost of the passport may be claimed. The University is not responsible for the cost of replacing lost or stolen passports.

4.8 Visas, vaccinations

Employees must use the University’s appointed travel management company to seek advice on the need for visas and vaccinations for overseas business travel. The cost of visas and vaccinations may be charged to the same cost centre as the travel tickets.