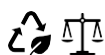


A4 Expenditure incurred while travelling and working away from primary place of work



A4.1 Scope

This appendix sets out rules and guidance relating to specific types of expenditure as referred to in Section 2 of the Procurement and Purchasing Policy, and in particular, expenditure incurred while travelling or working away from the University. The appendix covers expenditure on the following:

- travel
- accommodation
- subsistence
- telephone calls and internet access while travelling
- internet and phones for personal use
- extensions to business trips
- alcohol.

All of these categories of expenditure are an appropriate use of University funds when wholly, exclusively and necessarily incurred in order to perform University business. There is particular public scrutiny over the types of expenditure dealt with in this appendix so it is of the utmost importance that VFM in purchasing can be demonstrated and expenditure is met only where it is an appropriate use of University funds.

Anyone purchasing goods, services and works in these categories is subject to the provisions of this appendix; this includes anyone engaged in University business and some examples are:

- members of University staff and students
- external parties, e.g. external examiners, visiting researchers and other third parties, where the travel is directly related to University activities and has the prior approval of the University
- interview candidates for University jobs.

All purchases and any judgements made in respect of business need and/or VFM must be in accordance with the flowchart in appendix A1.2.1.

A4.4 Travel

A4.4.1 Travel planning

Travellers should plan their trips in advance to ensure they are able to establish a solution that meets their business need and provides the best

possible value for money. This will help to increase certainty around travel plans, ensuring that expensive 'open' tickets can be avoided; the best prices are obtained taking advantage of promotional and discounted fares avoiding costly late changes to bookings.

A4.4.2 Managed travel provider

The University's managed travel provider should be considered in the first instance for overseas travel, and for UK and overseas accommodation. If business need cannot be met or a better value for money solution can be found, an alternative provider may be used (see appendix A1.2.1). Comparative quotes should be obtained to evidence alternative solutions, and these should be retained by the purchaser. Advice can be obtained from the Procurement and Commercial Services team.

The managed travel provider will be able to assist with planning (particularly with more complicated trips) to ensure flexibility is built into arrangements where necessary, while still maximising low cost options that meet requirements.

The managed travel provider offers a price match guarantee on like-for-like bookings, and will help travellers to ensure they find the most cost effective mode of transport and lowest logical fare when on University business.

They have the capability to identify where travellers should be, according to their itinerary, and provide early advice if staff travel unexpectedly into areas of risk (e.g. extreme weather, natural disasters, terrorism or civil unrest) - including a 24 hour helpline for travellers. These value added services, along with those provided by the University's travel insurance provider, help the University to meet its duty of care obligations to staff and students.

The Finance website contains more information about the managed travel provider.

A4.4.3 Air travel and air miles

Members of staff and other external parties are required to travel in the cheapest available class of travel. This should normally be economy class. Travelling in a more expensive class requires advance authorisation from the Head of School or Director of Professional Service.

As a guide for Heads of School and Directors of Professional Service - travelling in a more expensive class is considered to be an appropriate use of University funds in the following circumstances:

- where the length of the journey and its timing in relation to business meetings or presentations requires good sleep and/or work on the flight, and better value alternative arrangements are not available. As a guide, planned flight durations of up to five hours should be economy, whilst

those with a total flight time of over five hours may be business class. The five-hour flight time guide is a total journey duration, which may involve more than one flight. Travellers will be expected to demonstrate value for money, and use premium economy or similar fares if available

- it is essential to the journey to accompany and work with someone from another institution who is travelling business class or equivalent
- the funding sponsor for the trip specifically allows business class travel and refunds the full cost, without creating the need for cuts elsewhere in a project.

In situations where you have extended periods between flights, the use of airport lounges is an appropriate use of University funds.

Air miles may be earned as a result of regular business travel. Any such air miles must be used for business purposes; for example, the purchase of facilities such as seat upgrades, the use of member departure lounges and priority booking arrangements. Air miles cannot be used for private purposes such as holidays, or to allow a traveller to be accompanied on a business trip by family or friends.

A4.4.4 Rail travel, Eurostar, Eurotunnel and ferry services

All rail and ferry services can be booked via the managed travel provider.

Other providers may be used, such as nationalrail.co.uk or thetrainline.com. Eurostar, Eurotunnel and ferry services can be booked direct with the service provider online.

The most economical class of travel should be used (taking advantage of all types of 'saver' tickets).

A4.4.5 Use of a private vehicle or hire car

Members of staff, students and other travellers are encouraged to travel by public transport wherever possible as this often provides better value for money, and supports the achievement of our environmental objectives.

In situations where public transport does not provide a viable travel solution on grounds of either cost or practicality, or where a number of travellers use a single vehicle, it would be an appropriate use of University funding to travel by private vehicle or hire car.

Where there is available public transport and the traveller chooses to use a private or hire vehicle, the lesser of the calculated mileage or hire charge and the total cost of available public transport for all the vehicle occupants will be met.

In all cases when using a private vehicle or hire car the driver is responsible for ensuring:

- the vehicle is in good working condition and maintained in accordance with the manufacturer's instructions with a valid MOT certificate if necessary
- valid car insurance is in place for the vehicle, specifically including cover for business use where necessary, which must be obtained at the personal cost of the individual.

The driver must be medically fit as described by the DVLA medical rules on driving and must hold a valid driver's licence for the class of vehicle used.

University funds will meet the cost of private car travel on University business, calculated using the mileage rates approved by HM Revenue and Customs (<https://www.gov.uk/government/publications/rates-and-allowances-travel-mileage-and-fuel-allowances>). The approved mileage rate is deemed to cover all of the costs associated with the use of a private vehicle.

The maximum the University will fund is the "standard cost of travel" by private vehicle, calculated as mileage rate multiplied by the distance travelled between the normal place of work and the business destination. If your journey is shorter because you started from or returned to a different location such as your home, the cost that will be funded will be based on the actual travel distance multiplied by the mileage rate.

In the case of a hire car, the University will fund the cost of car rental and fuel for the journey. Hire cars should be booked through the University's managed travel provider for bookings overseas and the nominated UK car hire provider for UK bookings unless it can be demonstrated that business need could only be met by using an alternative service provider. A vehicle appropriate to the distance travelled and the number of people travelling should be hired.

A4.4.6 Use of motor cycles and bicycles

It is appropriate use of University funds to meet the cost of motor cycle or bicycle travel at the mileage rates approved by HM Revenue and Customs (<https://www.gov.uk/government/publications/rates-and-allowances-travel-mileage-and-fuel-allowances>). The criteria for the use of private vehicles, described above, applies where appropriate.

A4.4.7 Taxis

It is an appropriate use of University funds to meet the cost of taxi travel on University business in cases of urgency, if no other public transport is available or where several people travelling together make it cost effective.

For anyone on University business, the actual cost of a taxi between a home

address and the University's campus or other location, such as a railway station, is appropriate use of funds only if the following conditions **all** apply:

- the member of staff is required to work later than their normal working hours or if they have been away on University business
- it is after 9.00pm at night
- public transport has ceased or it is unreasonable to use public transport.

The University will fund taxi journeys of up to a distance of 20 miles.

A4.4.8 Travel insurance

Travel insurance is a mandatory requirement for all University business travel that involves either an overseas trip, or an overnight stay if in the UK. Members of staff or students must arrange travel insurance through the University's Insurance Manager. More information is available on the Finance website - <http://www.sussex.ac.uk/finance/how/expenses/travel-insurance>

The University will not fund privately arranged travel insurance.

A4.5 Accommodation

Where an overnight stay is required, staff should consider in the first instance booking through the University's managed travel provider, unless accommodation is provided as part of a conference package arranged by the host institution or is specified for an event.

If the managed travel provider is unable to provide a solution that meets business need, and it is good value for money, staff may book an appropriate class of hotel independently with the prior approval of the Budget approver or, in the case of Budget approver's, their line manager.

Accommodation should normally be three star or equivalent for single occupancy. In circumstances where other classes of accommodation are deemed more suitable (proximity to destination, security considerations etc.), evidence of value for money should be retained. The cost of accommodation, excluding meals, can vary considerably from location to location and the amount the University will fund is therefore stated as a guide of £100 for standard locations and £200 for high cost locations, such as major cities, depending on the typical cost of three star accommodation. Staff are expected to be able to demonstrate and evidence good value for money judgements when deciding on an appropriate cost of accommodation.

Members of staff, students and other travellers should exercise caution if they use online or other similar services that arrange accommodation in private homes (for example, Airbnb). Whilst these may appear cheaper than other options, there is no certainty that the accommodation has been checked to ensure it is in accordance with acceptable health and safety standards and the University may be prevented from meeting its duty of care obligation.

Where the use of this accommodation is unavoidable, it is the responsibility of the individual to assess the suitability of the accommodation. Guidance on how to do this is available on the University of Sussex Health & Safety webpage under 'Travel'.

A4.6 Subsistence

It is an appropriate use of University funding to meet the cost of meals eaten while travelling away from the normal place of work on University business. As a guide to Budget approvers, trips of around 4 hours and more would be a reasonable basis for this. The following table details the maximum level of expenditure for meals considered an appropriate use of University funds. Actual costs incurred should be reasonable for the location.

Breakfast	£15 max	Following overnight stay, or journey starting before 6 a.m.
Lunch	£15 max	Total cost including soft drink. Alcohol is not an appropriate use of University funds (see Appendix A4.10)
Dinner	£30 max	Total cost, including any soft drink, if on an overnight stay, or unlikely to be home before 9.00 p.m. Alcohol is not an appropriate use of University funds. (see section 4.10)

The table above contains the only allowances for subsistence.

A4.7 Telephone calls and internet use while travelling

4.7.1 Use of personal mobile phones and devices for business

It is an appropriate use of University funds to meet the cost of telephone calls and internet access of members of staff for business purposes whilst travelling on University business where they do not have use of a University device. The cost of calls or internet access must be separately identifiable and supported by evidence (for example, provider call logs indicating cost).

Personal calls when away overnight are also allowable, within the limits below:

UK travel	£5 max	Total cost, per day.
Overseas travel	£10 max	Total cost, per day.

4.7.2 Use of University mobile phone for personal purposes

Except within the limits in the table above, whilst travelling on University business or in an emergency, it is not considered appropriate use of University resources for members of staff to use University-provided mobile phones for personal use.

A4.8 Internet and phones for personal use

It is not an appropriate use of University funds to meet the cost of internet access at the home address of members of staff or students, or the use of personal telephones (landline or mobile) when not away on University business unless approved in advance by the Director of Finance.

A4.9 Extensions to business trips

Members of staff may extend their business trips, for non-business reasons - e.g. holiday, personal research. The Budget approver and the line manager must approve the extension in advance. Clear evidence to support the cost of business trips must be retained (e.g. web print out demonstrating the cost of travel with and without the extension for a non-business reason).

Costs that are wholly and necessarily incurred in respect of the business element of a trip are an appropriate use of University funds. If the arrangement results in higher travelling costs, University funds will meet the equivalent cost had the traveller's journey been purely for business. If the arrangements result in the cost being less than would otherwise have been incurred, University funds will meet the actual cost incurred and no more.

A4.10 Alcohol

The consumption of alcohol at University organised events and business events attended by University staff should be appropriate and modest. It is only considered an appropriate use of University funds in specific circumstances expressly identified in this policy and set out in appendix A5. The University will fund conference delegate fees that include the cost of a conference dinner at which alcohol is served as part of an event package.