



UNIVERSITY *of*
WORCESTER

Travel and Expenses Policy

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1. Purpose

- 1.1 This document sets out the University's policy relating to travel, subsistence, and expenses. The Policy aims to provide clear guidance to enable University activity whilst complying with statutory regulations and the University's charitable and strategic objectives.
- 1.2 Expenses may only be incurred where required for University activity and should aim to keep the overall cost to the University to a minimum.
- 1.3 The Policy seeks to support the University's broader environmental objectives by encouraging more sustainable behaviours and discouraging carbon-intensive methods of working and travelling.
- 1.4 The core principles of the University's Travel and Expenses Policy are:
 - **Value:** The University's resources are used responsibly to achieve its goals. Value considers well-being, safety and security, the environment and cost effectiveness.
 - **Integrity:** Colleagues are trusted to do 'the right thing' and to ensure that the proposed travel is necessary, and that costs are reasonable, legitimate and incremental to normal expenditure. The University commits to reimburse legitimate expenses on the basis that an individual should not be 'out of pocket' from undertaking University business.
 - **Approval before expenditure:** All travel and expenses should be appropriately approved before any costs are committed.
- 1.5 This Policy is supplementary to the University's Financial Regulations. In the event of any conflict between the Regulations and Policy, the Regulations will prevail.

2. Scope

- 2.1 This Policy applies to all University expenditure and all funding sources.
- 2.2 This Policy applies to the following groups:
 - University staff, employed by the University or its subsidiary companies
 - University students.
 - Members of the University's Board of Governors.
 - Directors and non-Executive Directors of the University's subsidiary companies
 - Any person undertaking activity on the University's behalf.
- 2.3 This Policy applies to the following categories of expenditure and activity:
 - Business travel of all modes, including bikes, car, rail, and aeroplane.
 - Accommodation while travelling on University business.
 - Miscellaneous expenses, including training, conferences, gifts, telephones, wi-fi, eye tests, work clothes.

3. Booking Travel and Approval

3.1 Approval to travel

3.1.1 Travel should only be undertaken where:

- There is no reasonable, effective alternative to travel, e.g. attending an event virtually.
- There is a legitimate strategic business/academic requirement to do so.
- The risks of undertaking travel have been considered, see Section 5.

3.1.2 If considering overseas travel it is essential that advice is sought from the University's Insurance Office and the Foreign, Commonwealth and Development Office (FCDO) website to assess whether it is safe to travel to the proposed destination. Please note the University does not allow travel to areas where FCDO advises against all travel. Further information on overseas travel risk assessments and approval can be found on the [University's Travel Sharepoint](#) site.

3.1.3 Prior to booking any travel away from Worcester (or the staff member's normal place of work), approval must be sought from their line manager or Head of School or Professional Service in line with the University's current UK and Overseas Travel Approval Process which is available on the [University's Travel Sharepoint](#) site. From time to time and/or in specific circumstances, the University may introduce additional approval requirements which will be published on the Sharepoint site. Travellers should ensure they are following the latest University UK and Overseas Travel Approval Process and Guidance.

3.1.4 It is the responsibility of Heads of Academic Institutes/Schools or Professional Services to ensure they maintain appropriate records of Travel Approval requests and decisions.

3.2 Booking travel without approval

3.2.1 It is recognised that there may be instances, albeit rare, when it is necessary to book travel or incur expenses at short notice and Travellers are not able to request prior approval. These claims will require financial approval, in line with the University's normal approval requirements, post them being incurred, and non-compliant spend may not be reimbursed.

3.3 Responsibilities

Role	Responsibility
Travellers (individuals travelling on University business or in relation to study at the University)	Responsible for: <ul style="list-style-type: none">• ensuring that they have obtained appropriate approval to travel and incur costs• complying with all provision of this Policy• meeting any additional requirements of external funding bodies

Role	Responsibility
Line Managers	Responsible for: <ul style="list-style-type: none"> • Considering requests in line with this Policy and the University’s latest UK and Overseas Travel Approval Process • Ensuring that risk assessments for overseas travel have been completed • Ensuring that existing and new staff are made aware of policies, procedures and processes relating to travel and expenses
Heads of Academic Institutes/Schools and Professional Services	Responsible for: <ul style="list-style-type: none"> • Ensuring that the relevant budget has sufficient funds • Considering and, if appropriate, approving requests in line with this Policy and the University’s latest UK and Overseas Travel Approval Process • Ensuring that, for overseas travel, all appropriate travel documentation is in place • Ensuring that spend complies with any relevant funding rules and/or dates
PVC Academics and UEB members with line management responsibility for Heads of Academic Schools and Professional Services	Responsible for: <ul style="list-style-type: none"> • Considering and, if appropriate, approving requests in line with this Policy and the University’s latest UK and Overseas Travel Approval Process • Considering and, if appropriate, approving exceptional items specified within this Policy
Travel Bookers or their delegates	Responsible for ensuring that this Policy has been adhered to when booking travel on behalf of another individual
Insurance Office	Responsible for ensuring that travellers, particularly those travelling overseas, have completed the necessary risk assessments, mitigating actions have been put in place where necessary and travel insurance is in place
Procurement Team	Responsible for: <ul style="list-style-type: none"> • Supporting travellers with complex bookings and travel queries • Management of the University’s Travel Management Company (TMC) contract
Travel Management Company	Responsible for supplying travel itinerary and administrative support for travel on behalf of the University including: <ul style="list-style-type: none"> • Assistance with complex booking • Amendments to bookings

Role	Responsibility
	<ul style="list-style-type: none"> • Repatriation arrangements • Refunds and monitoring quality standards of services and products
PVC Finance & Resources	Responsible for: <ul style="list-style-type: none"> • Ensuring the University’s UK and Overseas Travel Approval Process is reviewed regularly, and updates communicated to the University community • Ensuring that the University’s Travel and Expenses Policy is reviewed in line with the University’s standard 3-year review timeframe

3.4 Travel Management Company (TMC)

The University has contracted a Travel Management Company (TMC) for the purchase of the University’s travel requirements.

3.4.1 The TMC offers a range of benefits:

- A reactive emergency response where an incident has occurred, helping the University to fulfil its duty of care to those travelling on its behalf.
- Access to a wider range of ticket rates and options (such as more flexible ‘academic fare’ and/or ‘charity fares’) than can be found through internet searches, including exclusive discounts for the University sector, and so will try to price match any fares found elsewhere.
- Advice on travel to Sanctioned Countries or countries where the Foreign & Commonwealth Office has given travel advice.
- Protect the University from incurring travel operator’s liability under The Package Travel and Linked Travel Arrangements Regulations 2018. This means that duties to provide information and emergency response service would be met by the TMC, which has the capability and expertise to deliver them on a 24/7 basis. The University is not able to provide this service. This is a particularly important consideration where the University organises field trips and inclusive travel arrangements on behalf of students and staff, where the TMC is better placed to arrange travel.

3.4.2 For these reasons the TMC must be used for all approved overseas travel requirements: flights, accommodation and in-country travel, unless the required itinerary can only be arranged by an alternative method. Those seeking to book such arrangements should contact their Head of Academic Institute/School or Professional Service if this presents urgent barriers to booking required travel. Advice can be sought from the Procurement Office.

3.4.3 The TMC may also be used for booking UK rail, flight and accommodation requirements. However, it is recognised that for a number of reasons, as set out in Section 8, travellers may be able to secure more cost-effective solutions through other routes.

3.5 Booking method

Travel should be booked using the University's preferred method as set out in this Policy and on the [University Travel Sharepoint](#) site.

3.6 Loyalty schemes

Travellers are required to travel in the most cost-effective class available regardless of carrier. Provided there is no cost impact to the University, the traveller's private loyalty scheme points may be used to upgrade flights or accommodation, or purchase lounge passes but the University will not reimburse the corresponding costs.

3.7 External funders

In all circumstances the University's Travel and Expenses Policy takes precedence over external funders' policies. When bids, which include funding for travel, are costed the costs identified should reflect the University's travel limits as far as possible.

3.8 Travel to Worcester/commuting

Commuting (travel to the place of work as specified in the staff member's contract) is not a permissible expense and would be deemed a taxable benefit by HMRC. For most people this will mean travel from their home to Worcester is not allowable as an expense claim. However, if someone's contractual place of work is elsewhere, or 'remote', then travel to Worcester would be allowable. Travelling to the office on a day that a staff member typically works from home is not an allowable expense as it is not a contractual right. Travel between the University's campuses is not an allowance expense.

A number of worked examples for claiming mileage are shown in the Mileage Examples document in the [University Travel Sharepoint](#) site.

3.9 Business journeys extended for holiday

It is permissible to extend a trip to include a period of leave provided that the personal travel is entirely incidental to the business trip and the cost to the University is not increased. This includes the change in flight costs from travelling on a different day. The University's insurance policy will only cover the traveller for the business element of their trip. Please refer to Section 5.

3.10 Compliance monitoring

All travel bookings and expenses claims will be subject to compliance monitoring. Non-compliance with the Policy could result in:

- Claims being escalated for further approval, ultimately by the member of UEB with responsibility for the relevant area of the University.
- Expenses not being reimbursed and/or the University seeking recovery/ reimbursement, from the claimant, of any non-compliant costs charged or incurred.
- In extreme cases of breach or fraudulent claims, disciplinary action may be taken.

3.11 Data protection and document retention

Expenses claims and associated data, including personal data, will be stored in line with the [University's Document Retention Schedule](#) and [Data Protection Policies](#).

3.12 Equality and diversity

This Policy supports the University's commitment to equality and diversity by allowing flexible travel options for travellers. Decisions on whether a trip represents value for money and appropriate sustainability should be made before any additional costs are incurred to accommodate any protected characteristic.

3.13 Reasonable adjustments

Reasonable adjustments to this Policy will be considered for those with relevant disabilities or medical conditions. There is no concrete definition of what constitutes a reasonable adjustment, as it depends on a person's specific needs and circumstances. As such, individuals requiring an adjustment for reasons relating to disability or a medical condition should discuss this with their line management in the first instance.

4. Payment and Reimbursement

4.1 Payment and purchase cards

Where possible travel and expenses should be paid for via the University Travel Management Company or a departmental University Purchase Card. Purchase Card holders are responsible for ensuring that all travel and expense-related purchases are accounted (i.e. allocated to the correct accounting codes and submitted) for by the 10th of each month, or within project close day if earlier. The timely submission of data enables budget holders to manage their budgets effectively.

4.2 Expenses claims

- #### 4.2.1
- Expenses claims are required to be submitted via the University's electronic expenses system, Access aCloud. If staff require access to aCloud, they should contact their Departmental Expenses Administrator, who will request set-up from the Payroll Department in Finance.

4.2.2 Claimants should ensure claims are:

- Submitted in a timely manner (no later than 60 calendar days from the return date or date of incurring the expenditure, or within project close date if earlier),
- Are reasonable, legitimate, within limits set out in this Policy, and
- Relate to genuine business expenditure incurred while undertaking their role/duties.

The timely submission of expenses claims is important as it enables budget holders to manage their budgets effectively and ensure that grant claims can be processed in a timely manner.

4.3 Expenses claims without prior approval

It is acknowledged that there may be times when a claimant will not have been able to get approval in advance, i.e. an unforeseen taxi or the need for a meal due to delays. The claimant is still able to claim for these unforeseen expenses although they will require approval. It is expected that these will be low value claims and they will be monitored to ensure overall understanding and compliance with this Policy. Non-compliant spend may not be reimbursed.

4.4 Receipts

4.4.1 Itemised receipts are required to support all claims; a general principle of 'no receipt, no reimbursement' will be applied, in line with HMRC guidelines. Credit card slips are not accepted as a receipt with a limited number of exceptions, e.g. road toll or London underground charges.

4.4.2 It is acknowledged that there are some locations where receipts are not commonly issued. For claims to be reimbursed under these circumstances, the claim must be supported with a brief reason/justification for the lack of receipt. A decision will be made based on the reasonableness of the claim and its compliance with appropriate rates and any supporting evidence such as the supplier's business card which are provided.

4.4.3 For lost receipts, claimants should provide a redacted bank/credit card statement to support the claim and a decision will be made on whether to reimburse based on the reason/justification provided.

4.5 Transactions in a foreign currency

4.5.1 Allowable expenses incurred in a foreign currency can be converted to GBP as part of the expense claim process:

- At the actual rate when converting GBP to local currency (on a formal receipt).
- At the actual GBP rate charged on a debit/credit card.
- Using the Finance system rate of the month the claim is made; this is available from the Finance Office.

- 4.5.2 When using a personal card for business expenses, claimants are reminded that some card providers levy significant charges for overseas transactions. Travellers are asked to check their providers' fee structure in advance and wherever possible select a purchase method with minimum fees.

5. Before Travelling

5.1 Health and safety when travelling

The University is committed to providing a safe and healthy workplace by preventing accidents and work-related ill health, eliminating hazards, and reducing risk. This should be done through risk assessments which form part of the Overseas travel approval form and is available on the [University Travel Sharepoint](#) site.

The [Health and Safety incident reporting procedure](#) helps the University to manage incidents and to learn lessons from incidents that either did, or had the potential to, cause harm. Travellers should familiarise themselves with the procedure which must be followed if an accident, incident or near miss occurs, whether in the UK or overseas.

It is recommended that Travellers sign up to the Call My App ahead of travelling. This App gives the user the ability to press a button for help wherever they are in the world and a message will be received by the University's security team who will escalate accordingly. Further information is available on the [Health & Safety website under Lone Worker](#).

5.2 Vaccinations

The NHS provides advice on recommended vaccinations and other precautionary measures to be taken when travelling overseas. This information is also available from the Foreign, Commonwealth and Development Office (FCDO) website. Some vaccinations are available free on the NHS, but where recommended vaccinations are only available privately or other medication is recommended, these costs will be reimbursed. Further information is available at the [NHS Fit to Travel webpage](#).

5.3 Travel Insurance

5.3.1 The University has a corporate Travel Insurance Policy covering:

- UK travel where there is at least 1 overnight stay
- Overseas travel

This only covers University business travel and not any personal element of a trip. Any additional/private travel insurance cost will not be reimbursed by the University.

- 5.3.2 Information and guidance on specific insurance requirements can be found on the [University's Travel Sharepoint](#) site. Please review this guidance regularly as the insurance policy is renewed annually and the requirement/cover can change from year to year.
- 5.3.3 Travellers requesting approval for journeys through the University's Travel Approval Form will automatically be referred to the University's Insurance Office where their requirements will be addressed. Any traveller not using the University's Travel Approval Form, for whatever reason, will need to ensure that they contact the Insurance Office themselves to make the necessary arrangements.

5.4 Passports and travel visa

- 5.4.1 The University will not reimburse the cost of a standard passport. However, where additional or second passports, or additional pages are required due to the frequency of travel on University business, or the requirement for visa applications, the incremental cost can be claimed.
- 5.4.2 The University will cover the cost of visas and other associated documentation required for business related travel. These should be arranged through the relevant countries' online Immigrations Service directly or the University's TMC rather than chargeable third-party service providers.
- 5.4.3 This Policy does not cover visas or work permits as part of recruitment or relocation.

6. Business Travel Rules

6.1 General

- 6.1.1 As set out in par 3.1.1 travel should only be undertaken where:
- there is no reasonable, effective alternative to travel e.g. attending an event virtually;
 - there is a legitimate strategic business/academic requirement to do so;
 - the risks of undertaking travel have been considered, see Section 5.
- 6.1.2 When considering options for travel consideration should be given to identifying the most cost-efficient approach as well as the most sustainable approach, recognising the University's strategy to reduce carbon emissions. It is recognised that these considerations may not always align, and priority should be given to cost efficiencies.
- 6.1.3 Public transport is the preferred method of transport but travel by car or motorcycle can be used if it is more cost effective, there is a significant time saving, or a need to transport heavy or bulky items. As with all travel plans, safety is paramount.

6.1.4 Car sharing with colleagues from within or external to the University should be considered as a viable option wherever appropriate and safe to do so.

6.1.5 Transport via active travel (e.g. walking or cycling) is encouraged whenever possible, recognising that for some travellers this will not be possible.

6.2 Taxis

6.2.1 Taxis should only be used when other forms of public transport are not available or suitable. Justification for the use of taxis is required when claiming.

6.2.2 An example of when other forms of public transport might not be suitable might be:

- Individual circumstances, e.g. disability, personal safety/security, illness, or injury.
- Requirement to carry luggage or bulky equipment.
- Group travel – value for money.
- Time constraints.
- Language difficulties/unfamiliarity with local geography.

6.3 UK car hire

6.3.1 Hire cars must be booked through the University's approved supplier; details on the [University Travel Sharepoint](#) site. Hire cars should, in the first instance, be delivered to the University campus during normal business hours. The delivery of hire cars to domestic addresses is subject to prior approval in line with this policy. Delivery of hire cars to domestic addresses outside of normal business hours is not permitted.

6.3.2 Staff and students will only be covered by the University's motor insurance policy:

- Once the appropriate driver approval documentation has been completed and received.
- When driving in the UK on University business.
- From the specified start and end times on the hire agreement (hire vehicles must not be used outside of these times). Hire vehicles are strictly for business use only – personal use is not permitted.

6.3.3 Staff and students are not insured:

- Before or after the specified start and end times of the hire agreement (even if a vehicle is delivered/collected outside of these times).
- When driving for social domestic or pleasure purposes.

6.3.4 Fuel costs (not mileage) can be claimed when supported by a full VAT receipt.

6.3.5 Hire cars must be returned with a full tank of fuel/fully charged to avoid excessive refuelling service fees.

6.3.6 Staff planning on hiring a vehicle for Work Related Travel need to complete a [Work Related Driver Questionnaire](#).

6.4 Overseas car hire

6.4.1 Overseas car hire can be arranged through the TMC alongside flights and hotel bookings. This approach removes the need to claim for car hire via the expenses system.

6.4.2. Overseas car hire can also be booked by the traveller and claimed as an expense. Expense claims should be submitted with confirmation of the car hire booking and evidence of payment.

6.4.3 Please note the University's insurer does not provide cover for hire vehicles overseas; travellers must ensure appropriate insurance for the hire period is in place.

6.4.4 The cost of fuel for vehicles hired for University business can be claimed with a fully itemised receipt.

6.4.5 Staff planning on hiring a vehicle for Work Related Travel need to complete a [Work Related Driver Questionnaire](#).

6.5 University Executive Car

6.5.1 The University owns a MPV which may be booked, subject to availability, by a group of staff travelling on University business. The vehicle can accommodate 7 people, including the driver. You can make a booking via the [Executive Car Booking Portal](#). Initial enquiries can be submitted to minibusbookings@worc.ac.uk

6.5.2 A record of each journey including the start/end mileage and name of the driver will be retained by the University. University vehicles must not be used for non-University business.

6.5.3 Vehicles must be kept on University premises overnight unless written permission has been given in advance as part of the booking process.

6.5.4 Fuel cards should be used where applicable, if a vehicle does not have a fuel card, the cost of fuel (not mileage) can be reclaimed with a full VAT receipt. Credit card receipts are not permitted. The cost of cleaning a vehicle can be reclaimed with a receipt; credit card receipts are not permitted.

6.5.5 The driver is liable for any fixed penalties or fines when driving a University owned vehicle.

6.5.6 Staff planning to drive the University owned vehicle need to complete a [Work Related Driver Questionnaire](#). Any damage incurred to the University owned vehicle will be charged to the relevant School/Department.

6.6 Private vehicles

6.6.1 The use of private vehicles should be kept to a minimum and public transport and the University owned vehicle should be considered.

6.6.2 The driver must ensure that they have the appropriate level of insurance for any journeys they are undertaking on University business. The Insurance Certificate and a valid MOT (where applicable) should be uploaded onto the University's expenses system. Any additional costs for business use insurance cover will not be reimbursed by the University.

6.6.3 Mileage rates are reimbursed as follows:

Transport	Mileage rate
Car and vans	<ul style="list-style-type: none">• 55p up to 10,000 miles per annum• 25p over 10,000 miles per annum
Motorcycle	<ul style="list-style-type: none">• 25p per mile
Bicycle	<ul style="list-style-type: none">• 20p per mile

6.6.4 Claims covering commuting (travel to staff member's place of work as specified in their contract) are not permissible as this is deemed to be a taxable benefit by HMRC. See section 4 for details and the worked Mileage Claim Examples on the [University Travel Sharepoint](#) site.

6.6.5 Staff planning to use their own vehicle for work related travel need to complete a [Work Related Driving Form](#).

6.7 Other driving costs and fines

6.7.1 Reasonable parking costs incurred whilst on University business are allowed with a supporting receipt/proof of purchase. The cost of parking for staff member's normal place of work is not allowed.

6.7.2 Toll Road charges and congestion charges are an allowable expense. It is accepted that receipts for these journeys may not be available (see section 4.4).

6.7.3 Claims for parking or driving fines/violations will not be reimbursed under any circumstances.

6.8 Bicycle hire

6.8.1 Bicycle hire is an allowable expense when utilised for business purposes. It is accepted that receipts for these journeys may not be available (see section 4.4).

6.9 Coach and bus

6.9.1 Travelling by coach and bus is often highly economical and is encouraged. Travellers are asked to book these on the relevant website, or pay on the bus itself, retain the receipts and claim reimbursement.

6.10 Rail and tube/metro

6.10.1 Standard class rail tickets must be used on rail journeys. First class travel is only permitted in exceptional or emergency situations with appropriate approval (see section 3.1). When booking Open/Anytime rail tickets, a suitable justification must be provided; Open/Anytime rail tickets to London are not permitted. Staff are not required to use the University TMC to book UK rail tickets (see section 3.4.3)

6.10.2 Rail cards can be used when purchasing tickets, however the University cannot reimburse the cost of staff rail cards as they are deemed a taxable benefit by HMRC. The University may reimburse student rail cards which fall outside the HMRC rules.

6.10.3 Staff are encouraged to look for the most cost-effective ticket option for their journey including split tickets and off peak.

6.10.4 Travel on the London Underground can be charged against a contactless or Oyster account whilst travelling on the underground. Paper tickets can also be purchased at National Rail and Tube stations. The cost of these can be claimed back with a valid receipt or redacted bank/credit card statement.

6.11 Overseas rail

6.11.1 Short notice, local/regional transport can be booked and paid for locally and claimed as expenses.

6.11.2 Travellers are expected to book equivalent to UK standard class in respect of comfort and safety.

6.11.3 Eurostar and other European train bookings should be considered as a potentially more sustainable option to flying when travelling to some European countries. This needs to be balanced against the cost and time spent flying to ensure the best value for money option.

6.11.4 Bookings for Eurostar and other European train bookings can be made through the University's TMC.

6.12 Domestic flights

6.12.1 UK flights are subject to approval in advance of booking (see section 3.1). It is not necessary to book UK flights through the University TMC (see section 3.4.3).

6.12.2 Where UK air travel is approved, economy class must be booked.

6.13 Overseas flights

6.13.1 Overseas flights are subject to approval in advance of booking (see section 3.1). Overseas flights should be booked via the University's Travel Management Company (see section 3.4) or for more complex travel arrangements, via the Procurement Office, unless alternative arrangements have been agreed. .

6.13.2 Class of travel is set as below:

Class	When to book
Economy	When flying time is 7 hours or less
Premium Economy	For any leg of a journey where the uninterrupted flying time is greater than 7 hours (where this service is available)
Business	Only if approved to meet reasonable adjustment and/or business effectiveness

6.13.3 Airport lounges – for long haul flights or flights with a long stopover, airport lounges will be considered with pre-approval (see Section 3.1).

6.13.4 The University will not pay for items that are considered personal choice expenses (e.g. seat selection or personal excess baggage).

6.14 Cancellations, refunds, and compensation

6.14.1 The traveller is responsible for initiating any refund claim and ensuring that the funds are returned to the payer:

Booked/Paid	Refund Process
Booked through Travel Management Company (TMC)	Traveller notifies TMC and the refund is automatically returned to the University or funder as appropriate
Booked directly by the traveller and claimed as an expense	Refund must be claimed by the individual traveller and returned to the University or deducted from expenses claim

6.14.2 Compensation for the inconvenience of a delay or cancellation can be claimed and retained by the traveller. Additional costs (such as refreshments and accommodation) due to delays, over and above those provided by the airline, may be claimed from the University.

7. Accommodation

7.1 UK accommodation

7.1.1 UK overnight accommodation is subject to approval prior to booking (see Section 3.1). The maximum rates per night inclusive of breakfast, all taxes and fees are:

Location	Rate
London and major cities (excluding Birmingham)	£150
Rest of UK (excluding Birmingham)	£120

7.1.2 The University has an account with Premier Inn which provides advantageous rates for the University. This accommodation can be booked directly via the University's business account. Please contact Procurement (email: purchasing@worc.ac.uk) to be set up on the account.

7.1.3 Colleagues are not required to use the University's TMC when booking UK Accommodation.

7.1.4 If breakfast is not included in the overnight room rate a separate claim can be submitted for reimbursement of these costs provided the room and breakfast costs combined do not exceed the maximum room rates stated above.

7.1.5 The cost of overnight accommodation in or near Worcester, including Birmingham, is not an allowable expense for Worcester-based staff (as specified in the staff member's contract of employment) unless there is specific funding for an event or conference.

7.1.6 In exceptional circumstances where staff are required to be on site in Worcester significantly outside of normal working hours, overnight accommodation may be booked in the University's [B&B provision, Barrington House](#). Staff should be aware that as a general rule the University will not fund stays in Barrington House where the employee's contracted place of work is Worcester, regardless if the stay is needed due to University business. Any exceptions to this will require prior approval from the Vice Chancellor and any approved stay will be subject to a P11D charge as it would be considered a taxable benefit by HMRC.

7.2 Conference accommodation

7.2.1 If attendance at a conference has been approved and a conference discount is available for accommodation which is within the University's set limits for the cost of accommodation, then the conference discounted accommodation may be booked.

7.3 Overseas accommodation

- 7.3.1 Overseas accommodation is subject to approval prior to booking (see Section 3.1). Overseas accommodation should be booked via the Travel Management Company, details available on the [University Travel Sharepoint](#) site.
- 7.3.2 The maximum rate per night inclusive of breakfast, all taxes and fees, is £150.
- 7.3.3 It is recognised that there are some instances where it may be necessary to pay a higher rate per night depending on the location travelled to, for example: for security reasons or where the local costs are significantly higher. This higher rate should be identified as part of the approval process and an appropriate justification provided.
- 7.3.4 If a traveller is having difficulty with rates or availability of suitable accommodation for their destination, please contact the University's Travel Management Company for advice. Contact details available on the [University Travel Sharepoint](#) site.

7.4 Staying with friends and family

- 7.4.1 Travellers may stay with friends and family whilst on University business instead of staying in a hotel. Up to 50% of the hotel rate, per night of the stay, for a meal as a gesture of thanks, can be claimed. No payment can be made directly to the host(s). A fully itemised receipt must be included with the claim.

7.5 Extended stays

- 7.6.1 Where business travel (to a single destination) is anticipated to exceed 1 calendar month, separate arrangements should be agreed in advance by the Head of Academic Institute/School or Professional Service and/or relevant funding body. In these circumstances it may, for example, be appropriate to consider more suitable and cost-effective accommodation options alongside an alternative subsistence allowance, to be agreed with relevant funding bodies.

8. Subsistence

8.1 UK subsistence

- 8.1.1 Staff who are necessarily away from their normal place of work, which for most people will be Worcester, on University business, are entitled to claim subsistence. Claims, supported by receipts, will be reimbursed up to the maximum level of expenditure as shown below. These rates are inclusive of tips and drinks:

Meal	Maximum reimbursed
Breakfast	£10

Lunch	£10
Dinner	£30

8.2 Overseas subsistence

- 8.2.1 Staff who are travelling overseas on University business are entitled to claim subsistence. Claims, supported by receipts, will be reimbursed up to a maximum level of expenditure as show below. These rates are inclusive of tips and drinks:

Meal	Maximum reimbursed
Breakfast	£10
Lunch	£15
Dinner	£30

8.3 Tips and gratuities

- 8.3.1 In countries, including the UK, where it is the culture to tip, the costs can be reimbursed. Tips above 18% will require specific justification. If during audit(s) tip amounts are deemed excessive a claim may be rejected. All tips and gratuities are included in the subsistence rates.

9. Miscellaneous expenses

9.1 Telephones and wi-fi

- 9.1.1 Personal telephone (landline or mobile) contracts cannot be reimbursed as this would have Tax and National Insurance implications. However, additional one-off charges incurred for utilising a personal mobile phone for business use (for example to resolve urgent matters whilst travelling) can be reimbursed with appropriate justification and supporting documentation, e.g. a redacted itemised bill.
- 9.1.2 Before travelling it is important to ensure that the appropriate package is uploaded to the mobile phone. University mobile phone users should seek advice in advance from IT. Where a personal mobile phone is being used advice can be found on the network providers website. Additional costs to access communication (e.g. wi-fi/internet access) whilst travelling can be claimed as a business expense provided it is required for business use.

9.2 Training and conferences

- 9.2.1 All training and conference attendance must be approved and booked in advance (see Section 3.1). Approved training/conference events should be booked and paid directly by the University and not claimed as an expense.

9.3 Gifts

- 9.3.1 There may be occasions where it is appropriate to give gifts, e.g. it may be culturally expected in some countries. If this is the case, in the first instance consideration should be given to corporate gift, e.g. University print or book. Please see [Policy on Gifts, Hospitality and Bribery Prevention](#) for further information.
- 9.3.2 Expenditure on flowers, on behalf of a department or team, is an acceptable charge in the case of long-term sickness or bereavement of a current member of staff/student. These items should be purchased through University procurement channels and cannot be claimed as an expense.
- 9.3.3 Expenditure relating to other gifts, sympathy, retirement, or goodwill tokens are not permitted.

9.4 Incidental travel expenditure

- 9.4.1 In urgent or emergency circumstances low value items can be purchased provided a full itemised invoice/receipt, evidence of payment and a full justification is provided to support an expense claim. This would include, for example, the replacement of a broken laptop charger in order to continue working.
- 9.4.2 Minor incidental expenses can be claimed such as laundry costs when travelling on University business. Incidental expenses that cannot be claimed include toiletries and newspapers.

9.5 Childcare

- 9.5.1 The University does not fund childcare for staff in any circumstances including when a member of staff works outside standard office hours or travels.

9.6 Eye tests

- 9.6.1. The University can offer limited contributions towards the costs of eye care due to HMRC restrictions. Information on how to claim for eye tests is available on the [Health & Safety webpages](#).

9.7 Work clothes

- 9.7.1 The University will provide specific items to ensure safety, such as protective goggles, as well as uniforms, but will not reimburse for items ordinarily worn by any member of staff e.g. waterproof coat.

9.8 Other

9.8.1 Expenses claims for goods or services that are available through the standard procurement process are not allowed. Where a University contract for goods or services is unavailable or unable to supply a suitable product to meet the need, claimants should liaise with the Procurement Team or the holder of a Departmental Purchase Card to discuss purchase.

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