



# The University of Manchester

## Travel Policy

## **1 Introduction**

- 1.1 The University of Manchester's Strategic Plan articulates three core goals: world-class research; outstanding learning and student experience; and social responsibility. We aim to be a truly international university, with a global reach in our research, teaching and social responsibility, and commit to environmental sustainability as a key priority across the full range of our activities.
- 1.2 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, we have to ensure that the University has adequate and effective management arrangements in place to protect the health & safety of its staff and students.
- 1.3 Every individual proposing to work or study overseas on University business should give adequate and serious thought to their own health and safety as well as the conditions and situation that they are likely to encounter. It is the responsibility of each individual to actively participate and co-operate with the University in the execution of its responsibility.

## **2 Policy Aims and Objectives**

- 2.1 The aim of the policy is to consider the health, safety, resource and environmental implications of all University related travel and to put in place procedures which control the risks and resources associated with working and travelling abroad on behalf of the University.
- 2.2 This policy sets out measures to help protect the health, safety and welfare of staff and students working or studying outside the United Kingdom, and sets out controls to ensure that the trip is in line with the University's strategic aims and is an effective and economical use of University resources.
- 2.3 This policy provides guidance to staff and students planning an overseas visit and to their line managers and supervisors, and sets clear roles and responsibilities as well as expectations for staff and students on business trips.

## **3 Scope**

- 3.1 This policy applies to all University staff at all levels within the organisation who are required to travel outside the United Kingdom on University business and on University funds irrespective of the origin of the source of funding.
- 3.2 This policy applies to students of the University who are required to travel outside the United Kingdom for learning or research purposes as part of their degree programme of studies.
- 3.3 The terms "traveller" and "travellers" used in this policy refer to staff or students as defined in 3.1 and 3.2.
- 3.4 All of this policy applies to University students undertaking self-funded overseas placements as part of their degree programme of studies with the exception of Section 5.1 covering travel bookings.
- 3.5 Whilst the policy specifies the means of organising travel outside the United Kingdom, its guiding principles and values apply to all travel including travel within the United Kingdom.
- 3.6 All of this policy applies to travel which is wholly funded and administered by another institution with the exception of Section 5.1 covering travel bookings.

## 4 Pre-Travel Authorisation

- 4.1 All travellers intending to travel overseas on University business must obtain prior approval from their line manager or supervisor before making any related travel arrangements or commitments.
- 4.2 The policy requires travellers to provide the following to their School/Research Institute/ Professional Unit to seek official approval from their line manager or supervisor before travelling:
- Dates of period away from the University
  - Purpose of the trip or expected outcomes of the trip
  - Funding source/Account code(s)
  - Note of preliminary agreement from the Budget Holder; or a confirmation of funding availability if the traveller is the budget holder
  - Health and safety arrangements of the proposed trip
  - Cover arrangement whilst away where appropriate
- 4.3 Failure to obtain approval prior to arranging travel may result in the traveller not being covered by the University's travel insurance and render them ineligible to claim any expense incurred. Failure to obtain approval prior to arranging travel is a serious breach of the policy and may be addressed under the University's disciplinary procedures.

### Purpose of trip pre-approved by Line Manager

- 4.4 The University aims to limit annual emissions from air travel to 50% of our 2018/19 level (pre the Covid-19 pandemic), taking advantage of the related advances in virtual engagement to reduce our environmental impact. All international travel must be justified and the traveller must be able to demonstrate that the proposed journey fits with the academic and business strategy of the University, and that the expense, environmental impact and risks associated with the journeys are proportionate to the anticipated outcomes. The traveller should demonstrate that alternatives to travel, such as video-conferencing, having been fully considered and are not appropriate.

### Financial pre-approval by Budget Holder/Line Manager

- 4.5 Reducing the environmental impact of travel is an important part of ensuring sustainability and protecting the environment. When travel is necessary, travellers must assess their different journey options and preference should be for the most carbon-efficient option possible. This needs not be the cheapest option. Rail should be the default option for travel within the United Kingdom. Domestic air travel will only be permitted in exceptional circumstances that must be discussed in advance with the relevant approver. When feasible, travel to European destinations within reasonable reach of the high-speed rail network should be made by train (e.g. Paris, Brussels) and, whenever possible, ongoing European connections.
- 4.6 Expenditure on travel, including rail and air fares, car and bicycle mileage and hotel accommodation, is no different to all other University spending. It must be:
- for *bona fide* University purposes; and
  - approved in advance by the relevant budget holder; and
  - budgeted funds must be available to meet the full cost.

- 4.7 Travellers must ensure with the budget holder or the Finance Office that there are sufficient budgeted funds available. Financial pre-approval must be sought from the budget holder for all trips.
- 4.8 If the traveller is the budget holder, he/she can provide preliminary self-approval up to £2000. If the total estimated cost including VAT is greater than £2000, preliminary financial approval will need to be sought from the Head of School/Research Institute/Professional Unit.
- 4.9 If the cost of travel at the time of booking is 10% or more<sup>1</sup> than the estimated cost, the traveller will need to seek re-approval of the higher cost by the budget holder / Head of School.
- 4.10 Air travellers should travel tourist or economy class. However, business class air travel may be reimbursed for journeys outside Europe with the prior written approval of the Head of School / Director of Professional Services. In the case of travel by a Head of School or Director of Professional Services, this must have the prior written approval of the Vice President / Dean of Faculty / Registrar.

#### Risk Assessment checked by Line Manager

- 4.11 Travellers must comply with the University's Health and Safety Policy and Arrangements, and complete a suitable and sufficient health & safety risk assessment of the proposed trip and submit it to their line manager or supervisor as part of the pre-approval process.
- 4.12 The University will provide model risk assessments and prompts to support the completion of a fit-for-purpose risk assessment. When assessing the risks, travellers should consult the Foreign, Commonwealth & Development Office (FCDO) website, which gives specific travel advice on all countries of the world, including advice on crime, health, terrorism and natural disasters.
- 4.13 If the trip is to a region where the FCDO advises against all but essential travel, travellers must discuss the details of the proposed trip and the associated risk assessment with their line manager. The line manager may seek further advice from the Director of Compliance and Risk. Travel to an area described by the FCDO as "all but essential travel" requires approval from the relevant Vice President and Dean of the Faculty.
- 4.14 If the FCDO is advising against all travel to an area, then travellers must not attempt to travel to, or through, those regions unless specific approval is sought from the Registrar, Secretary and Chief Operating Officer through the Vice President and Dean of the Faculty.
- 4.15 Following a submission/approval of the risk assessment, if there is any significant change in risks, the traveller should re-assess the risks involved and seek re-approval from their line manager or supervisor before travel. Such risks may include, but are not limited to, political/civil disorder, significant environmental health issues and natural disasters.

## **5 Travel Bookings**

- 5.1 All travel arrangements that can be pre-booked in advance must be arranged through the University appointed travel agent. It is a mandatory requirement for travellers to organise their overseas travel arrangement through the University official travel booking agent. This may be done on-line for routine travel or off-line, direct with the University appointed travel agent, for more complex trips.

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<sup>1</sup> Or £200 whichever is greater

- 5.2 It is accepted that it may not always be possible for every type of transport overseas to be pre-booked through the University appointed travel agent, such as local taxi, internal country rail and tube journeys. In these circumstances these may be reclaimed as expenses or paid for on travel expense cards.

## **6 Emergency Contacts**

- 6.1 In order for the University to identify and manage any risks associated with overseas travel, travellers must inform the University of their overseas travel plan and emergency contact details.
- 6.2 It is a mandatory requirement for travellers to provide their overseas contact details to the University through the University's official travel agent or other appointed supplier. In addition to their School/Research Institute/Professional Unit, travellers should also ensure that they have their up-to-date contact details on the University HR system and Campus Solutions as appropriate.
- 6.3 In an event of an emergency incident, the University will contact travellers in the country where the emergency incident occurs. Travellers must respond to the University's text or email and confirm their safety as soon as they practically can.

## **7 Non-Compliance**

- 7.1 Non-compliance with this policy may result in action being taken in accordance with the University's disciplinary procedures for staff and students.

## **8 Expense Claims**

- 8.1 The expenses claims system is intended to reimburse actual expenditure incurred by travellers while on University business. Accordingly, the University does not pay a daily subsistence rate or similar system.
- 8.2 The University will reimburse only those costs that are wholly, necessarily and exclusively required for University purposes.
- 8.3 No member of the University shall make a claim in respect of any expense that was not incurred, or claim a sum in excess of that actually incurred or shall otherwise profit or cause anybody else to profit at the University's expense from such a claim, or make a fresh claim for any expense incurred and previously claimed from the University or another body.
- 8.4 All claims for payment must be completed in a form approved by the Director of Human Resources, and comply fully with the detailed rules in the Financial Procedures, Expenses Guidelines and the statutory regulations.

## **9 Inoculation and Vaccinations**

- 9.1 Travellers must ensure that they have the appropriate vaccinations necessary for the trip. Common vaccinations may be obtained from the University's Occupational Health Service. Any fees incurred in obtaining other vaccinations for business travel can be paid by the University.
- 9.2 If in doubt, travellers should meet with a health consultant in the University Occupational Health Service for guidance and advice.

## **10 Personal Health**

- 10.1 Any traveller who is required to travel on any University related matter should not do so if their doctor has advised against this. Any traveller who has an existing medical condition and is concerned about their ability to travel should seek their doctor's advice before travelling.
- 10.2 The traveller must obtain a doctor's note of fitness-to-travel if they suddenly fall ill before starting their trip or returning back home. The University insurance may not cover the trip or any expenses incurred in the event of a failure to seek prior medical clearance.
- 10.3 It is the traveller's responsibility to ensure that they take ample supplies if they require any medication which has been prescribed to them by their doctor. They should check with their doctor and be aware that certain countries have specific regulations that may prevent them from taking some medicines into the country and obtain a medical certificate that the drugs are certified for personal use. It is the traveller's responsibility that such a certificate is obtained and carried with them during the whole journey.

## **11 Personal Travel**

- 11.1 If there is element of personal travel combined in the business trip, travellers must meet all of the costs relating to the personal element of the trip. Business trips must not be planned solely for the purpose of facilitating personal travel.
- 11.2 Travellers shall not claim any additional travel costs, subsistence or other expenses for days taken as holiday linked to a business trip. Private travel insurance must be taken out to cover the private part of the journey.

## **12 Travelling with a Companion**

- 12.1 The University will not meet any costs relating to the spouse, partner or child of a traveller who accompanies the traveller on a business trip. Such costs must be paid directly, and cannot be charged to the University and then reimbursed. Companions must not travel, or incur any accommodation, meals or other costs, at the University's expense.
- 12.2 If the invoice includes both private and University business travel costs, the traveller should settle the total invoice and reclaim the University business element from the University. Private insurance must be taken out to cover the partner's travel.

## **13 Promotional Incentives**

- 13.1 A traveller should neither gain nor lose financially in relation to expenditure and reimbursement on business travel arrangements. The purchasing decision shall not be influenced by any promotional incentives such as airline mileage credits or personal cash credit card discounts or rebates.
- 13.2 If air miles are gained as a result of University funded travel, these must be used whenever possible for future travel on University business. Travellers must not book flights with a more expensive airline to gain personal benefits such as air miles.

## 14 Roles and Responsibilities

### 14.1 Travellers should ensure

- that they maintain communication with the University and have a suitable and functional phone appropriate for the country to be visited. If they do not possess one, they should discuss ways to communicate with the University in case of emergency;
- that they manage their own health and safety whilst undertaking off-site visits and other activities, and not compromise the safety of colleagues with whom they may be travelling. If the risk profile has changed whilst in country, travellers should conduct a dynamic risk assessment to re-assess any new emerging risks.

### 14.2 As far as reasonably practicable, line managers and supervisors should ensure

- that a suitable and sufficient risk assessment is completed prior to each overseas trip, taking account of up-to-date information on the FCO website. Where a significant residual risk is identified, sign-off should be secured from a member of the Senior Leadership Team, on behalf of the University;
- that the traveller who undertakes travel as part of their work is suitably trained, knowledgeable about their destination and sufficiently experienced to do so;
- that the traveller is medically fit for travel. If in doubt, line managers and supervisors should ask to receive a fitness-to-travel note from the traveller;
- that the traveller has provided emergency contact details to the University;
- that suitable action is taken to manage incidents which may arise involving University travellers.

### 14.3 The Head of School/Research Institute/Professional Service is responsible for the overall well-being of all staff and students within their area. They should ensure that their travellers act in accordance with this policy.

Document control box	
Policy / Procedure title:	Business Travel Policy
Date approved:	20 September 2022
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Version:	3.0
Supersedes:	2.0, 1.0
Previous review dates:	5 October 2021
Next review date:	To be confirmed (every 2 years)
Related Statutes, Ordinances, General Regulations:	

Related policies:	<ul style="list-style-type: none"> <li>• The University of Manchester Financial Regulations <a href="http://documents.manchester.ac.uk/display.aspx?DocID=1741">http://documents.manchester.ac.uk/display.aspx?DocID=1741</a></li> <li>• Anti-Corruption and Bribery Policy <a href="http://documents.manchester.ac.uk/display.aspx?DocID=17994">http://documents.manchester.ac.uk/display.aspx?DocID=17994</a></li> <li>• Bribery Act Statement <a href="http://documents.manchester.ac.uk/DocuInfo.aspx?DocID=15635">http://documents.manchester.ac.uk/DocuInfo.aspx?DocID=15635</a></li> <li>• Gift Acceptance Policy and Processes <a href="http://documents.manchester.ac.uk/display.aspx?DocID=15157">http://documents.manchester.ac.uk/display.aspx?DocID=15157</a></li> </ul>
Related procedures:	<ul style="list-style-type: none"> <li>• The University of Manchester Financial Procedures <a href="http://documents.manchester.ac.uk/display.aspx?DocID=1742">http://documents.manchester.ac.uk/display.aspx?DocID=1742</a></li> </ul>
Related guidance and or codes of practice:	<ul style="list-style-type: none"> <li>• University Health &amp; Safety Arrangement Chapter 9: University Health &amp; Safety Risk Management and Risk Assessment – Key Principles <a href="http://documents.manchester.ac.uk/display.aspx?DocID=13900">http://documents.manchester.ac.uk/display.aspx?DocID=13900</a></li> <li>• University Health &amp; Safety Arrangement Chapter 24: Health &amp; Safety in Off Campus Work including field work, field trips and business travel <a href="http://documents.manchester.ac.uk/display.aspx?DocID=15496">http://documents.manchester.ac.uk/display.aspx?DocID=15496</a></li> <li>• Safety Service Guidance: Risk Assessment – frequently asked questions <a href="http://documents.manchester.ac.uk/display.aspx?DocID=10128">http://documents.manchester.ac.uk/display.aspx?DocID=10128</a></li> <li>• Safety Service Guidance: The Role of Generic and Dynamic Risk Assessment <a href="http://documents.manchester.ac.uk/display.aspx?DocID=10129">http://documents.manchester.ac.uk/display.aspx?DocID=10129</a></li> <li>• General Risk Assessment Form with guidance for use <a href="http://documents.manchester.ac.uk/display.aspx?DocID=10019">http://documents.manchester.ac.uk/display.aspx?DocID=10019</a></li> <li>• General Risk Assessment Form <a href="http://documents.manchester.ac.uk/display.aspx?DocID=12097">http://documents.manchester.ac.uk/display.aspx?DocID=12097</a></li> <li>• Online Expenses Claim for Staff <a href="http://www.staffnet.manchester.ac.uk/human-resources/current-staff/pay-conditions/expenses/">http://www.staffnet.manchester.ac.uk/human-resources/current-staff/pay-conditions/expenses/</a></li> <li>• Expenses Claim for Non-University &amp; External Personnel <a href="http://documents.manchester.ac.uk/DocuInfo.aspx?DocID=8287">http://documents.manchester.ac.uk/DocuInfo.aspx?DocID=8287</a></li> </ul>
Related information:	<ul style="list-style-type: none"> <li>• Occupational Health Services: Travel Risk Assessment Questionnaire <a href="http://documents.manchester.ac.uk/display.aspx?DocID=9752">http://documents.manchester.ac.uk/display.aspx?DocID=9752</a></li> </ul>
Policy owner:	Director of Compliance & Risk
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### Version amendment history

Version	Date	Reason for change
0.1	Oct 2016	Creation, draft version
0.2	21 Oct 2016	Incorporated comment from Registrar, Secretary and Chief Operating Officer
0.3	25 Oct 2016	Incorporated comments from REMG
0.4	14 Nov 2016	Incorporated comments from PRC
0.5	2 Dec 2016	Incorporated further comment from Registrar, Secretary and Chief Operating Officer



1.0	15 Feb 2017	Version 1.0 approved by Board of Governors
2.0	7 July 2020	Scope of policy reviewed by ex-Registrar, incorporated comment in 3.4 and 3.6
3.0	13 Oct 2022	Revision in 4.4, 4.5 and 4.10 in line with the University Environmental Sustainability Strategy.