



<b>Title:</b>	Business Travel Policy & Procedures
<b>Keywords:</b>	Travel, Business, Expenses, Air Travel, Rail Travel, Passport, Visas, Reservations, Hotel Cancellations, Hire cars.
<b>Description:</b>	Policy regarding Business Travel at BU
<b>Version number:</b>	V3
<b>Approved by:</b>	ULT
<b>Approval date:</b>	October 2019
<b>Publish Date:</b>	October 2019
<b>Next Review Date:</b>	6 March 2021
<b>Policy Owner:</b>	Finance Director
<b>Audience:</b>	Staff & Students

## Business Travel Policy & Procedures

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## 1. Introduction

This document establishes mandatory policies for staff required to travel on business on behalf of the University. Travel costs and related expenses form a substantial part of the University's total expenditure so it is essential that the economic costs are managed efficiently and effectively.

Viewed alongside the environmental impact of the travel itself, and the social impact of our duty of care to our staff, this policy forms our sustainable approach to travel procurement.

### 1.1 Policy Objectives

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

- Has concern for the welfare and safety of students and staff travelling on behalf of the University;
- Fulfils the needs of the University and the employee; including the University's Duty of Care to its travellers;
- Ensures economic cost effectiveness through the use of a single travel company, including the aggregation of travel spend categories allowing the University travel partner to achieve low fares and tariffs;
- Ensures that travel is the only option; travellers should always consider alternatives such as web seminars or video conferencing before travel costs are committed;
- Confirms that if travel is required, staff complete business travel in the most cost effective and sustainable way.

The need to travel should be considered prior to any commitment to purchase. Only once this need has been identified as absolutely necessary, and authorised, should any bookings for travel be made. The single largest contribution to sustainability is not to travel if it can be avoided.

### 1.2 University's Travel Management Company (TMC)

Having a TMC ensures that there is support through every step of the journey. Pre-trip, mid-trip and post trip. The benefits of using a TMC include:

- Expert advice from a Dedicated Travel Team providing a high level of customer service to meet your bespoke requirements exclusively. This includes full 7/24 in house support, free of charge, when you require assistance outside of the normal office hours.
- One stop shop – provides a single point of contact for all your travel requirements to help you avoid having to book yourself or claim back on expenses. As a full service Travel Management Company they will book all your travel requirements within the boundaries of the BU Travel Policy. No trip is too simple or complex.
- Variety of Booking Methods – provides an online booking solution for simple point to point travel itineraries through the link to a Dedicated Travel HUB. For more complex requirements the Dedicated Travel Team at the TMC are on hand to service your travel requirements and provide expert advice via email and

telephone.

- Bespoke Travel HUB – provides access to a tailored online HUB for “all things travel”. This online website house access to the online booking systems, visa portal, traveller profiles, and tracking tool to name a few. Travel advice such as travel alerts, vaccinations, weather, and foreign advice can all be accessed through the HUB. The core contact details are easily accessible and there is the ability to leave customer service feedback online.
- Duty of Care - BU has a duty of care to all employees. When travel arrangements are made independently neither BU nor the TMC can ensure the safety and wellbeing of employees at any given time. The TMC monitors worldwide events on our behalf and proactively contacts our travellers to avoid risk where possible through their Crisis Management Programme. This helps keep us covered under the Corporate Manslaughter & Homicide Act 2007.
- Traveller Profile Suite – provides 7/24 access to all travellers to create, update and manage their personal information securely via an individually defined unique password. Having a Traveller Profile not only ensures that you can provide your travel preferences such as seat request, dietary requirements etc. but also your emergency contact details for those unexpected travel emergencies when you most need the support. Access can be provided to Travel Arrangers within BU to manage on your behalf along with the TMC Dedicated Travel Team.
- Price Match Guarantee – Should you find a cheaper travel quote, on a like for like basis, the TMC will book this price on your behalf and not charge a booking fee. Price matches should be from a reputable source to ensure the financial stability and safety concerns are addressed. Cheaper costs may not represent similarities in terms of flexibility and cancellation costs. You should also consider the cost of your time in searching the internet for that “better deal”.
- Variety of Fares – utilises a multi-source approach to booking travel and therefore will utilise multiple sources through the Dedicated Travel Team to ensure the most cost-effective travel quotations are provided. The TMC have access to a variety of airfares including budget airlines, published fares and discounted Academic and negotiated fares and rates not available in the public domain. Benefits include holding fares, reduced cancellation fees etc. There are no booking fees charged by the TMC to amend or cancel travel bookings.
- Travel Policy Compliance – only bookings that adhere to the BU travel policy are accepted meaning you don't breach the BU travel policy.

### 1.3 General Procedures

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

**No other suppliers will be permitted, and the majority of all travel arrangements covered in this policy must be conducted through this supplier (TMC).**

The only exceptions to this Policy are:

- Travellers attending a conference or training and hotel accommodation has been pre-arranged at a more cost effective rate by the organiser;
- For long terms stays over 2 weeks which must be made through an ABTA certified agent;
- When students are awarded funding by BU but are responsible for booking their own travel arrangements, which must be made through an ABTA certified agent;
- When the locations of the hotels available through the TMC are not suitable for the business need (but travellers or bookers must make the TMC aware of these instances so they can put in place arrangements for future trips).
- UK Coach Hire is excluded from this policy. Staff should follow the University's normal processes to obtain competitive quotes from appropriate bus & coach suppliers.
- The TMC can organise group travel events for both staff and student trips but there are a number of specialist providers for these trips who will often receive preferential group travel rates and additional benefits such as on-site representatives/co-ordinators. Group travel events can therefore be competitively bid but must include the TMC. If a.n.other travel provider wins the competition staff leading the process must ensure that chosen providers have the experience and travel credentials necessary to maintain safe group travel events including a recognised travel industry standard such as ABTA or ATOL. Alternative providers must also provide similar services to the TMC such as arrangements to offer alternative travel arrangements including getting groups home in emergencies.

In order that financial benefits are maximised and staff welfare is safeguarded, it is a requirement that all travel arrangements are made in strict adherence to this Travel Policy. In support of this, the use of unregulated services to provide accommodation or travel is not permitted irrespective of cost savings.

**If travel related arrangements are not formally agreed with line management prior to travel and are made through another agent, other than the appointed TMC, the expenses incurred may not be approved and authorised by the University and the individual may be required to settle these accounts.**

#### 1.4 Corporate Manslaughter & Corporate Homicide Act 2007

##### Important Regulation Note:

The University has a responsibility/duty of care under The Corporate Manslaughter and Corporate Homicide Act 2007 to ensure all staff are protected. By using the Travel Management Company staff have access to 24-hour assistance. This means that if there is an incident anywhere in the world, the TMC will be able to contact travellers in the area to rearrange travel at no additional expense and at the traveller's convenience.

Unregulated services such as AirBnB are strictly prohibited under this policy.

For further information, please contact:  
D Lifford – [dlifford@bournemouth.ac.uk](mailto:dlifford@bournemouth.ac.uk) 01202 962772

## 2. Objectives of the Business Travel Policy and Procedures

This policy seeks to define the travel in terms of the tenements of sustainability; Social, Economic and Environmental:

### **Social Factors**

- To ensure all business travellers have a clear and consistent understanding of policies and procedures for business travel and related expenses;
- To ensure that the travel services offered to those travelling on business will be of an appropriate standard to enable the University to fulfil its duty of care to business travellers and deliver value for money;
- To provide the framework for a quality travel service that meets the needs of the University.

### **Environmental Factors**

- To enable the University to work towards reducing the carbon footprint or environmental impact of business travel where practical.

### **Economic Factors**

- To maximise the University's ability to negotiate discounted rates with preferred suppliers and thereby reduce travel expenses through pro-active utilisation of management information;
- To provide guidance on the types of expenditure that will and will not be reimbursed by the University. To inform business travellers and those approving expenses of their responsibilities when controlling and reporting travel expenditure. (see BU Expenses Policy);
- Aim to relieve business travellers from the need to declare travel expenses in their income tax returns.

## **3. Other Important Linked Travel Policies**

BU Expenses Policy - All costs incurred by BU must meet the BU Expenses policy for reimbursement to take place.

Insurance - go to [BU Travel Insurance](#)

Health & Safety provide information for overseas travel available on the Staff Intranet – go to [BU Overseas Travel](#).

## **4. Policy and Procedures**

### **4.1 Policy**

All business travellers will adhere to the Business Travel Policy & Procedures when incurring travel and associated expenditure on behalf of the University.

These policies & procedures include:

- Internal procedures and rules around reimbursement of expenses (BU Expenses Policy);
- To purchase the most cost effective tickets for all travel when using the University's Travel Management Company i.e. the BU policy is to purchase standard class rail tickets and economy flight tickets (*see paragraph 1.3 and 6.1 for exceptions*);
- Promotional incentives, including airline preference based upon personal frequent flyer membership – these schemes must be fully transparent to the University and should not be chosen where alternative fare/airline options provide greater value;
- The University has a number of corporate schemes registered with the TMC;
- Members of UET, Deans and Directors of Professional Services are responsible for ensuring the policy is implemented and adhered to;
- Partners can travel with members of staff and partner travel arrangements can be

organised through the University's Travel Management Company. However, all charges and costs associated to the travel and expenses of the partner must be paid in full by the traveller through personal credit or debit card facilities and line manager approval must be obtained;

- The TMC invoices the University monthly in arrears for all booked travel. Bookers and travellers must obtain budget approval before committing to Purchase Order;
- If you intend to take a period of annual leave at the destination you are visiting immediately before or after your scheduled engagements, this must be agreed in advance by your line manager. The University's travel insurance covers any business trip plus seven days in total as 'leisure' time. The seven days can be split to cover leisure time before, during and/or at the end of any business trip. Personal insurance must be organised for any time additional to this. Any tax liability arising as a result of a potential financial benefit linked to personal time taken around a period of overseas travel will remain the responsibility of the individual member of staff. Accommodation or any other travel arrangements for personal use may be arranged through the University's Travel Management Company, but must be paid for with a personal credit or debit card at the time of booking.

## 4.2 Procedures

Before undertaking any journey, please consider whether travel is the appropriate use of resources; for example is the meeting necessary and if the answer is yes, please consider the most sustainable route and mode of transport. Please use the [Sustainable Travel Hierarchy](#) to inform your choices.

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

A business journey is one necessarily undertaken by an employee to carry out his or her 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.

In contrast, the cost of travelling from home (or any other place the employee attends for personal reasons such as the home of a friend or relative) to a permanent place of work is generally not claimable as this is regarded for tax purposes as "substantially ordinary commuting" and therefore a private journey. The University will reimburse the cost of these journeys only where there is an authorised standing arrangement for special circumstances such as emergency call-outs, but any payment will always be taxed.

## 5. Travel Arrangements

All air, rail, hotels, ferry, and overseas car rental reservations, including en-route changes and additional services such as visa requirements, will be arranged through the University's Travel Management Company (both for UK and overseas travel).

All UK based car rentals are made through our locally contracted supplier, not our travel management company, and must be made in accordance with BU's driving policy. Staff should book hire cars via the [online system](#), which will provide live availability of vehicles and the opportunity to extend hires directly should this be required.

Booking all travel through the University's Travel Management Company will not only ensure that cost saving opportunities are maximised, but will also ensure that in the event of an emergency, the University knows who to contact and can quickly and easily find out where travellers are.

### **5.1 Reservations and Ticket Request Procedure**

The Business Travel section on the Intranet should be referred to for details regarding the travel booking process.

Online bookings can be made directly via our Travel Management Company online system. This includes features to hold flights "look, don't book", which enables flights to be held until authority to book is obtained. This is also a very useful feature for general searching for journey options without the need to book the travel at that time.

### **5.2 Passports and Visas**

The travelling employee is responsible, where applicable, for all passport and visa requirements. Facilities are available through the University's TMC 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.

### **5.3 Traveller Profiles**

Due to increased airline security requirements and to ensure the TMC can provide an efficient and effective service, all business travellers will have a traveller profile created with their personal data.

It is the responsibility of each traveller to keep the University's TMC up to date of any changes to individual requirements or personal details. The information is held by the University's TMC in the strictest of confidence in accordance with the provisions of the Data Protection Act 1998.

For staff safety, the TMC has been instructed not to offer any flight provided by an airline on the European Commission banned list. More information can be found on the [European Commission Travel](#) website.

## **6. Air Travel**

Whilst the needs of the traveller will be taken into account, all travel must be cost and time effective.

The University's TMC will discuss the best options with the travel coordinator/traveller when making the reservation.

All business travellers are expected to accept the lowest available airfare as determined by our TMC.

Where the online tool is used, staff members booking the travel must apply these air travel rules. Exceptions will be identified in monthly management reports where this process has not been followed.



## 6.1 Class of Travel

Economy travel is the BU standard, with premium economy (where available) for daytime flights over 8 hours (daytime flights are defined as those which are completed within a day, in relation to the departure time zone).

Business Class is explicitly excluded unless nil cost upgrades are offered or in exceptional circumstances, where for example a research grant funder has specifically allowed Business Class air travel as part of the funding agreement and will be paying the Business Class fare. Any such exceptional Business Class ticket purchases must have been pre-authorised by the Dean of Faculty or the Director of Professional Services. The TMC will not accept the order without this pre-trip authority.

Premium economy class tickets are only available where the intensity of the trip warrants travel at this level or where this class of travel is less costly than the lowest available economy ticket for the individual journey. Where premium economy is required due to the exemption above, approval from Department Head/Budget holder must be obtained.

## 6.2 Flexibility of flight arrival/departure

Flight departure or arrival time within two hours before or after the requested times should be accepted where a saving can be identified.

## 6.3 Indirect Flights

One stop or connecting flights may be utilised if savings of £200 or more can be achieved and the total travel time does not increase by a maximum of 2 hours.

## 6.4 Airline Preferences

Business travellers may not specify a preferred carrier.

Participation in airline frequent flyer schemes is only permitted provided they do not conflict with Travel Management Company recommendations on the most cost effective journey.

## 6.5 Limit of key personnel travelling together

University personnel travelling together should generally be restricted to 4 per flight, wherever feasible. Risk assessments of the potential impact to the business should be undertaken when group travel decisions are made.

## 6.6 Travel planning tips

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

- Planning travel well in advance wherever possible – this will ensure the best prices are obtained;
- Discussing travel arrangements with the University's TMC – 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 academic fares where possible.

The key to obtaining the best possible fares for flights or rail travel is early booking as soon as the trip is confirmed as being necessary. The TMC can offer many excellent airline fare deals, including a range of special academic air fares which can provide great value, but good planning and booking early is key to obtaining these deals.

## 7. Rail Travel

Tickets, whenever possible, should be arranged through the University's TMC, via the rail booking tool on their website and obtaining a booking reference number or QR code which can be used at all stations to either retrieve tickets or instead of a ticket in the case of the QR code. The use of this tool is the most cost effective way of booking rail tickets.

All staff will travel standard class (with seat reservations where required) and are expected to investigate the possibility that two single tickets may be cheaper than a return and that saver tickets may be available at lower cost.

Consideration should also be given to travelling at off peak times where significant savings can be made, and tickets should be purchased well in advance of travel to take advantage of the discounts offered by Advanced Purchase (APEX) tickets.

In exceptional circumstances staff may travel first class provided prior approval is granted which must be given by their line manager in writing.

## 8. Hotel Accommodation

All hotel accommodation must be booked through the University's Travel Management Company.

### 8.1 Rooms

Business travellers should stay in standard rooms (single occupancy) with private bath/shower, minimum 3\* (or UK 3\* equivalent overseas) where applicable. Business travellers may accept room upgrades to suites or executive floor rooms if the upgrade is at no additional cost to the University.

### 8.2 Payment for room

Payment for the cost of the room (including breakfast and VAT where appropriate) will normally be settled directly by the University through the TMC. On checking out, the employee will be required to settle all incidental charges. Reimbursement of such costs is subject to rules on allowable expenses as detailed in the expenses policy.

*The University's standard hotel rate restrictions are detailed in the BU Expenses policy.*

## 9. Cancellations

All requests for cancellations must be made directly to the University's TMC.

Cancellation conditions vary depending on the travel supplier (i.e. airline, hotel). It is advisable to familiarise yourself with the cancellation conditions for your flight/rail

journey/hotel/hire car when you receive your confirmation itinerary.

### **9.1 General Cancellation Procedure**

When a trip is cancelled after the air/rail ticket or hotel/car hire voucher has been issued, the traveller should firstly enquire about using the same ticket for future travel.

You may be liable for cancellation charges if you do not cancel your reservation prior to travel.

No-Show charges are not reimbursable.

### **9.2 Ticket Refunds**

All ticket refunds must be supported by returning the unused portions to the TMC with details of the original order number, invoice number if known, and full booking details.

### **9.3 Airline ticket cancellations**

Airline tickets may sometimes be reissued for a nominal fee or no fee at all dependent on airfare eligibility requirements. It should be noted that some airlines now charge 100% cancellation charges if the ticket is not cancelled prior to departure or when the restrictions advise.

If it is not possible to reuse the tickets, proceed as follows:

- Cancel the reservation as soon as possible through the University's TMC;
- Confirm cancellation in writing;
- Obtain a reference for the cancellation;
- Ask for confirmation of cancellation charges and refunds due in writing, these should be included with any insurance claim;
- Obtain details of charges for administering the cancellation;
- Give the original order number to the TMC and ask for the credit to be put against that order number;
- Advise your commercial contact of the cancellation and amount to be reimbursed to the order so that they can cross reference the refund.

### **9.4 Unused/voided airline tickets**

Unused airline tickets or flight tickets must never be discarded or destroyed as these documents may have a cash value. In general, the minimum value would be the airport taxes that can be reclaimed via the agency where the ticket was purchased.

### **9.5 Hotel Cancellations**

Contact our TMC to cancel a hotel booking. Always obtain a reference.

If you do not cancel a hotel reservation and do not show up at the hotel, you may be liable for the cost of the room for the duration of the stay you booked. Even when a booking is cancelled, you may still be liable for a cancellation fee, depending on the time of cancellation.