



GLOBALSEAWEEDSTAR TRAVEL & SUBSISTENCE POLICY

*Created: 13/03/2018
Last updated: 20/09/2019*

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Policy Statement

GlobalSeaweedSTAR may require project team members to travel on official business, and will reimburse claimants for the costs of travelling. The aim of this policy is to ensure that there are equitable rules identifying what expenses can be reasonably incurred in the fulfilment of duties and how those expenses will be recovered. Travel and subsistence claims, as all GlobalSeaweedSTAR expenditure, are met by funds received from UKRI therefore, it is imperative that there is full compliance with this policy and that claims are processed in a consistent and effective manner. All those travelling on GlobalSeaweedSTAR business, and making claims under this policy are expected to recognise their obligations to consider whether the trip is necessary, to consider alternative, cheaper options, and make claims only on costs properly incurred.

In line with GlobalSeaweedSTAR commitment to environmental sustainability, claimants are encouraged to consider and try to minimise environmental impact of journeys made on behalf of GlobalSeaweedSTAR whilst achieving travellers' requirements in the most convenient and cost-effective manner.

This policy applies to all GlobalSeaweedSTAR partners and sub-contractors of a permanent or temporary nature who intent to claim travel and subsistence via the GlobalSeaweedSTAR budget. This may also apply to non-Global Seaweed STAR parties such as Advisory Board members and GlobalSeaweedSTAR Fund grant holders. For further information on the application of this policy, please contact the GlobalSeaweedSTAR project management board at GlobalSeaweedSTAR@sams.ac.uk

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| Date of update | Changes made | Updated by |
|-----------------------|---|-------------------|
| 26/08/2018 | References to RCUK changed to UKRI | Sarah Forgiveve |
| 20/09/2019 | Worldwide Subsistence Rates links updated to reflect rates effective April 2019, formatting change & logo update. | Sarah Forgiveve |

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1. Principles

1.1 The objectives of the GlobalSeaweedSTAR Travel & Subsistence Policy are:

- To reimburse claimants promptly for expenses properly incurred on GlobalSeaweedSTAR business
- To obtain maximum value for money from the GlobalSeaweedSTAR expenditure on travel and subsistence whilst taking account of the safety and wellbeing of employees and environmental considerations.
- To ensure that the GlobalSeaweedSTAR expenditure on travel and subsistence represents only the necessary and reasonable costs incurred by or on behalf of those who are properly engaged on GlobalSeaweedSTAR business;

1.2 The reimbursement of expenses is on a receipted actual basis, in the case of overseas expenses these must be within the maximum limits set by the HMRC's benchmark scale rate payments

(https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/781249/Worldwide_subsidence_rates_effective_6_April_2019.pdf).

1.3 Expenses will only be reimbursed if they are claimed in line with this policy.

1.4 The cost of travel between home and the normal place of work is the responsibility of the claimant and will not be reimbursed.

1.5 The GlobalSeaweedSTAR management recognises that in exceptional circumstances (e.g. emergencies, inability to obtain a receipt, travelling in certain countries abroad) a claimant may have to deviate from this policy. If travelling to countries abroad with a recognised risk of this and where a daily subsistence rate would be more appropriate this must be agreed in advance with the Senior Project Manager.

1.6 Individual claims must be approved and checked for compliance with the requirements of this policy.

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Localised policies that override the GlobalSeaweedSTAR Travel & Subsistence Policy are not permissible.

2. Definition of terms

2.1 Travel

2.1.1 The term of this policy covers short visits away from the vicinity of the employee's usual place of work for up to a maximum of 30 working days on GlobalSeaweedSTAR business.

2.1.2 This policy excludes daily travel to and from the claimant's normal place of work.

2.2 Subsistence

2.2.1 The actual necessary and reasonable cost of meals and/or accommodation incurred by those engaged on official GlobalSeaweedSTAR business, whilst away from claimant's normal place of work.

2.3 Claimant

2.3.1 A person making a claim to GlobalSeaweedSTAR within the provisions of this policy.

3. Travel claims

3.1 Travel Approval

3.1.1 The authorising manager must approve all travel prior to being booked or undertaken.

3.1.2 Each institute will have their own local arrangements for giving permissions to travel on official GlobalSeaweedSTAR business but in each case, approval needs to be given by the authorising manager in accordance with the provisions of this policy.

3.2 Mode of Travel

3.2.1 Claimants may choose their own form of transport subject to the overriding consideration of value for money however; GlobalSeaweedSTAR preference is for team members to use public transport. It is recognised that a combination of modes of travel may need to be used for particular journeys.

3.2.2 The use of taxis will only be reimbursed under certain circumstances and as with all travel, a receipt must be provided including journey details and dates.

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3.3 Environmental impact of travel

3.3.1 Before booking travel claimants should consider whether the trip is necessary or whether teleconferencing or video conferencing offer a viable alternative.

3.3.2 When arranging travel, GlobalSeaweedSTAR encourages claimants to use the mode of travel that results in the least environmental impact, as carbon dioxide from travel, particularly from air and road travel, is a key contributor to climate change.

3.3.3 Where choosing a more environmentally friendly mode of travel results in a significant increase in costs, value for money should be sought.

3.4 Public transport – Class of travel

3.4.1 Claimants are expected to travel standard class by train and economy class by air. All claimants should actively seek value for money where it is practical and feasible.

3.5 Exclusion of first-class travel

3.5.1 GlobalSeaweedSTAR team members and other claimants are not permitted to travel by first class on any form of transport including air and rail. This exclusion also applies to business class travel.

3.5.2 Alternatives to first class travel must be sought in all but exceptional circumstances.

3.5.3 Travellers are welcome to upgrade from standard at their own expense (or use personal reward miles) however, GlobalSeaweedSTAR will only reimburse the cost of the standard fare.

3.6 Mileage allowances

3.6.1 Payments for using privately owned vehicles on official business could be reimbursed based on the HMRC's approved rates.

3.6.2 GlobalSeaweedSTAR will only pay the HMRC approved mileage rates for appropriate journeys related to the GlobalSeaweedSTAR programme.

3.6.3 Reasonable expenses incurred on parking, congestion charges, tolls and ferries can be claimed in respect of journeys that qualify if receipts or other documentary evidence is provided.

3.6.4 Mileage allowance does not cover the cost of travel between home and the normal place of work; this is the employee's responsibility.

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3.7 Loyalty points awarded by airlines, hotel chains etc.

3.7.1 Claimants may not specify a particular supplier solely to gain air miles or any other form of loyalty points.

3.7.2 GlobalSeaweedSTAR will not reimburse claims where private Air Miles or Loyalty points have been used for GlobalSeaweedSTAR travel and the cash equivalent is being sought.

4. Accommodation

4.1 Overnight Accommodation – standards (Short visits)

4.1.1 When overnight accommodation is required, it is normally expected that claimants at all levels which meets the standards set out below at the most economical rate available.

- En-suite facilities (shower or bath)
- TV
- Tea/coffee making facilities
- Telephone in the room
- Internet access in the room is desirable; costs will be reimbursed if there is a demonstrable business need.
- Satisfactory personal security arrangements and adequate emergency procedures.
- Restaurant facilities should be available on the premises or locally, offering breakfast and a reasonably priced menu for lunch and dinner.

4.1.2 The claimant should meet extra cost such as newspapers, room service, mini bar, film/DVD hire.

4.1.3 A guide to overseas accommodation rates are available from (https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/781249/Worldwide_subsistence_rates_effective_6_April_2019.pdf)

4.1.4 The preference of individual claimant in their choice of accommodation will be respected subject to the overriding consideration of value for money.

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5. Daily subsistence

5.1 Meals

5.1.1 Claimants may claim the reasonable costs of meals taken in the course of business travel if they are absent from their normal work place for more than five hours.

5.1.2 Meals should be of a reasonable cost and standard. Appendix 1 provides maximum limits for meal expenses in the UK. For foreign travel please see https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/781249/Worldwide_subsistence_rates_effective_6_April_2019.pdf for maximum limit.

5.1.3 Reimbursement will not be made to claimants:

- Working at their normal place of work
- Who are in receipt of a daily allowance for foreign travel

5.1.4 When claimant must stay overnight in a hotel and/or where on official business outside normal working hours, GlobalSeaweedSTAR will reimburse the cost of a reasonable evening meal within the limits listed in Appendix 1.

5.2 Tips and alcoholic beverages

5.2.1 Tips or discretionary service charges not exceeding 10% of the total bill will be reimbursed where such payment is included in receipt, and are included in the limit of Appendix 1.

5.2.2 Alcoholic beverages will only be reimbursed when drinks total one per person taken with an evening meal, and are included in Appendix 1.

5.2.3 In relation to overseas travel, GlobalSeaweedSTAR recognises that in many foreign countries tipping is a key part of the service culture and is expected rather than discretionary; such costs will therefore be reimbursed. Claimants should annotate the receipt to show the value of the tip left.

6. Specific provisions for overseas travel

6.1 Visa fees for overseas travel

6.1.1 Claimants required to travel overseas on GlobalSeaweedSTAR business will be reimbursed the cost of visa fees when necessary for travel on production of a receipt.

6.2 Exchange rates (UK Institutes)

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6.2.1 Where expenditure has been incurred in a foreign currency the claimant should use the exchange rate prevailing at the time that they purchase the currency, or incurred the expenditure to calculate the cost in British pounds. This calculation must be accompanied by supporting receipts e.g. a receipt for changing currency, credit card statement.

6.2.2 Where there is no evidence of the specific exchange rate the expense claim should be made in the currency of the receipt.

6.2.3 Claimants will be reimbursed for currency exchange commission's when accompanied by a receipt/documentary evidence.

6.2.4 Overseas Partners – Quarterly claims will be reimbursed based on the exchange rate on the last day of the quarter.

6.3 Immunisation and inoculations for overseas travel

6.3.1 Claimants required to travel overseas on GlobalSeaweedSTAR business will be reimbursed the cost of any immunisation treatments required for the travel on production of receipts provided GlobalSeaweedSTAR has approved the travel.

6.4 Support from other bodies

6.4.1 A team member or grant awardee may apply to another body for expenses for the attendance of overseas conferences with approval from GlobalSeaweedSTAR.

6.4.2 Claimants may not claim the same expenses from GlobalSeaweedSTAR and from another body.

6.4.3 There are occasions where GlobalSeaweedSTAR buys a ticket for travel for a claimant and/or reimburses the claimant for the expenses, pending payment to the claimant from a third party. In these circumstances, the claimant is obligated to repay GlobalSeaweedSTAR at the earliest opportunity. Failure to repay will be reported to the Executive Board for disciplinary action.

6.5 Risk Assessment

6.5.1 For travel to countries highlighted by the Foreign and Commonwealth Office (FCO) as being a risk, a bespoke risk assessment should be undertaken and retained on file, including details of appropriate steps put in place to mitigate any specific risk identified.

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7. Other Expenses

7.1 Visits lasting more than 30 working days

7.1.1 When a visit away from the normal place of work extends beyond 30 working days, the arrangements described above will be replaced by a package determined by the project management.

7.2 Other non-travel related expenditure

7.2.1 In line with the principles of this policy expense claims are not to be used to purchase equipment, materials or services that should be bought through the normal procurement process.

7.2.2 In exceptional circumstances, reimbursement will be permitted if the explanation is accepted and the senior project manager approves the claim.

7.3 Extension of business trip for personal reasons (including personal research)

7.3.1 The claimant must make all costs relating to the extension of a trip personally. It must be clearly demonstrated that GlobalSeaweedSTAR business was the primary purpose for the visit. Leave records should be appropriately completed.

7.3.2 Any travel insurance paid for by GlobalSeaweedSTAR will not cover the cost of additional days of any extension of a business trip for personal reasons.

7.4 Family Travel

7.4.1 GlobalSeaweedSTAR will not meet any costs relating to the accompanying spouse/partner or family member of a team member or grant awardee traveling on GlobalSeaweedSTAR business.

7.4.2 Where spouses or companions accompany GlobalSeaweedSTAR team members, the costs must be separated appropriately e.g. if a single room costs £70 and a twin/double £100, the difference of £30 must be deducted to the claim.

7.5 Miscellaneous travel related expenses

7.5.1 Consideration will be given to the reimbursement of other travel related expenses not considered elsewhere in this policy on approval by the senior project management.

8. How to claim reimbursement

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8.1 Institutional Claims

8.1.1 For partners in the Global Seaweed STAR consortium travel claims should be submitted and reimbursed by your individual institution and will be included in your institutions quarterly claim to the Lead Party (SAMS).

8.1.2 Any claims without receipts should be supported by evidence, if available. SAMS cannot guarantee these will be reimbursed should the evidence not be sufficient.

8.1.3 Claims to institutions should not be approved unless the authorising manager is satisfied that the expenditure was incurred wholly, exclusively and necessarily in the performance of the duties of the claimant's role on the GlobalSeaweedSTAR project.

8.1.4 Expense claims should be submitted to the claimant's institution no later than 30 days after the expenses being incurred to allow adequate time for the quarterly claim to be produced.

8.1.5 Individual institutions may at their own discretion allow team member to put forward an application for an advance payment prior to travel provided to ensure team member is not significantly out of pocket. Evidence would need to be submitted on return of travel, as Lead Party (SAMS) will only reimburse claims with correct evidence.

8.2 Travel Grant Claims

8.2.1 See travel grant guidelines for claim process.

9. False/Fraudulent claims

9.1.1 All Claimants are responsible for completing claims accurately.

9.1.2 Authorising managers from each institution will be responsible for ensuring their team is implementing this policy and that all travel claims submitted in quarterly claims are accurate.

9.1.3 Any attempt to claim expenses in breach of the GlobalSeaweedSTAR Travel & Subsistence Policy or to assist another colleague to breach the Policy will be considered a serious disciplinary offence and will be dealt with by the Global Seaweed STAR Executive Board.

10. Application of the procedure

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10.1 The aim of this policy is for fair and effective application of the procedures. All reasonable expenditure will be reimbursed and it is therefore important that all those who authorise claims share a consistent interpretation of what constitutes 'reasonable'.

11. Review of policy

11.1 This policy will be reviewed regularly to incorporate any legislation changes. The Global Seaweed STAR Executive Board may also request a review of this policy.

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Appendix 1

| <u>UK Subsistence Rates Expenditure</u> | <u>Maximum Costs</u> | <u>Evidence required</u> |
|---|----------------------|--------------------------|
| Breakfast (if not included in hotel rate) | £7.50 inc. VAT | Receipt |
| Lunch | £15.00 inc. VAT | Receipt |
| Dinner | £25.00 inc. VAT | Receipt |
| Accommodation (London & Edinburgh) | £170.00 inc. VAT | Invoice/Receipt |
| Accommodation (Elsewhere in UK) | £120.00 inc. VAT | Invoice/Receipt |
| Incidentals | £5.00 | Receipt |
| Mileage rate in the UK | 0.45p per mile | No receipt required |

Worldwide Subsistence Rates

[https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/781249/Worldwide subsistence rates effective 6 April 2019.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/781249/Worldwide_subsistence_rates_effective_6_April_2019.pdf)

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