



UNIVERSITY OF
LEICESTER

Travel Policy



Table of Contents

1. Purpose	3
2. Scope	3
3. Principles	3
4. Environmental Sustainability.....	3
5. Financial and Insurance Related Procedure	4
5.1. Financial Requirements	4
5.2. Unregulated Accommodation	5
5.3. Travel Insurance	5
5.4. Staff Mobility Framework.....	5
6. Risk Assessment	6
7. Incident Management and Reporting.....	6
8. Responsibilities.....	7

1. Purpose

1.1.1. The purpose of this policy is to enable individuals and groups to arrange business, educational or research related travel, whilst ensuring the University is able to meet its health and safety obligations, financial regulations and environmental sustainability targets.

2. Scope

2.1.1. This policy covers all University business, educational and research-related travel undertaken by staff or students. For the purpose of this document, the word “travel” encompasses the journey, the activities undertaken and any accommodation. This policy should be considered alongside the detailed procedural documents for the following categories of travel:

- Overseas travel for staff and PGR students
- UK and in country travel for staff and PGR students
- All travel for individual students on taught programmes (e.g. work placement, study abroad)
- All travel for groups of students on taught programmes (e.g. fieldtrips)

3. Principles

3.1.1. In line with its strategic objectives as a research-intensive teaching institution, the University is committed to ensuring that students and staff are appropriately supported to fulfil their academic objectives and/or the business needs of the University when travelling, whilst delivering on our health and safety, financial and environmental sustainability obligations.

4. Environmental Sustainability

4.1.1. It is recognised that the University’s business, educational or research activities often requires travel to be undertaken, however we are cognisant of the need to take positive action to significantly reduce our carbon footprint. Further information on the University’s environmental sustainability commitments can be found on [SharePoint](#).

4.1.2. In line with current guidance from funders, the University commits to increasing opportunities to connect and carry out research and innovation activities virtually wherever possible. Where travel is deemed essential, we will actively seek to travel less often and prioritise low carbon modes of travel (whilst ensuring that Equality, Diversity & Inclusion considerations also remain key).

4.1.3. To support this the University has developed a travel hierarchy which is designed to help minimise the environmental impact of our travel. Travel organisers are required to consider the hierarchy, summarised below. Further information can be found on the Sustainable Travel Hierarchy SharePoint [Page](#).

Hierarchy Principle	Explanation
1) Avoid Travel	The utilisation of various technological resources can allow us to achieve our goals without the need for travel, for example through arranging or attending remote or hybrid events.
2) Reduce Travel	If travel cannot be avoided, we should reduce the frequency of trips, considering: <ul style="list-style-type: none"> Combining multiple separate trips to the same destination/region into one longer trip. If possible, choosing locations that are closer to home. Minimising the size of the group travelling to the same event
3) Choose efficient, low carbon travel	If travel is unavoidable, travellers should utilise efficient, low carbon modes of transport. Booking via the University's Travel Management Company can provide information on the carbon emissions for each transport option. Any increased cost of a greener mode of transport can be offset by minimising the number of trips taken.
4) Maximise the benefits	If travel cannot be avoided, we must maximise the benefits: <ul style="list-style-type: none"> Ask staff to pursue and declare research funding and publication opportunities as part of their trip application Maximise the value of a trip through increased travel efficiency and fewer travellers Where possible, travel should be planned in advance (approx. 4 weeks) to allow for coordination and the maximisation of institutional benefits (through extending our global reach, research income, publications, student recruitment, alumni events and offset/community programmes)

5. Financial and Insurance Related Procedure

5.1. Financial Requirements

5.1.1. The principles relating to the financial aspect of travel are set out in the University's [Financial Regulations](#) (see section 5), this includes:

- The expenses reimbursement procedure
- Business use of personal vehicle and Hire Cars
- Rail and Air Travel
- Hotel Accommodation
- Subsistence

5.1.2. It is expected that in the first instance all travel (except for individual student travel) should be arranged via the University's Travel Management Company (UTMC), Clarity. Although booking travel via the UTMC may potentially carry additional cost, it is recommended due to the availability of additional benefits, such as:

- Providing access to a 24/7 365 days a year emergency helpline to safeguard the welfare and safety of travellers.
- Supporting the achievement of the University's sustainability targets through greater transparency of modes and frequency of travel provided.
- Representing the best value for the use of University resources through benchmarked pricing and efficient booking and invoicing processes.

5.1.3. When booking via the UTMC is not preferable, travel can also be booked via an alternative company, however the UTMC should first be given the opportunity to match or beat the offer of the alternative provider. The Procurement Unit will retrospectively review bookings made

with alternative providers to check compliance with this policy, and for use with managing the contract with the UTMC.

5.2. Unregulated Accommodation

- 5.2.1. The use of unregulated accommodation, that is provided by vendors such as Air B&B, can pose a number of specific and significant risks. However, it is recognised that a flexible approach to accommodation requirements should be taken, whilst still being cognisant of our legal and moral obligations. Therefore, the use of such accommodation is not prohibited, but unregulated accommodation should only be considered after the UTMC have attempted to find suitable accommodation through a regulated provider (except for individual student travel). Where unregulated accommodation is used, the reason must be noted within the risk assessment.
- 5.2.2. On arrival, travellers should satisfy themselves that the accommodation provides a reasonable level of safety and that any risks are acceptable. In the event there are issues of this nature, travellers should seek alternative accommodation immediately.

5.3. Travel Insurance

- 5.3.1. For UK travel, specific travel insurance is not required as appropriate insurance is automatically provided under the University's Employer's and Public Liability cover. However, travellers should be cognisant that specific high risk activities may be excluded from this standard cover.
- 5.3.2. For international travel on University business, all staff and students are required to use the University's travel insurance policy. When applying for insurance, any health related issues should be considered to ensure that the right insurance cover can be provided, although there is no requirement to notify the Insurance Team of any pre-existing medical conditions. However, travellers should not travel against medical advice and carry sufficient medication for the duration of the trip. The University's Insurer provides in-depth travel, security and health information via a mobile app which should be downloaded prior to travel.
- 5.3.3. It may also be necessary to ensure that medical insurance cover is sourced. The European Health Insurance Card (EHIC) free medical insurance scheme is only valid for existing cards. New applications or renewals must be made for a Global Health Insurance Card (GHIC) but the levels of cover should be checked to ensure that appropriate cover is provided.
- 5.3.4. There is a process to facilitate personal holidays booked before, after or during travel for University business. Insurance can be arranged to cover holidays that are incidental to a trip, providing the personal time totals fewer days than the number of business days.
- 5.3.5. Further details and guidance on the University's insurance policies and cover can be sought from the University's Insurance Office [SharePoint](#) site.

5.4. Staff Mobility Framework

- 5.4.1. For international travel, travellers should be cognisant of the Staff Mobility Framework, which states that the University does not support staff working from overseas to carry out their normal duties, unless for a limited number of specific reasons which are pre-approved in advance.

6. Risk Assessment

- 6.1.1. Risk assessments play a key role in the identification and understanding of risks associated with travel. However, recognising that in some cases travelling for work will not carry significant risk, the University has implemented a flexible approach towards the requirements for undertaking risk assessments. The specific requirements are detailed within each associated procedural document.
- 6.1.2. Where a risk assessment is required, this must be completed prior to travelling, which considers the following factors:
- The type of activity
 - The hazards and risks associated with the activity
 - The duration of the visit
 - The location of the activity including any name of host organisation
 - Foreign, Commonwealth and Development Office (FCDO) travel advice
 - Communication channels available
 - Traveller's individual characteristics
 - Transport arrangements
 - Type of, and arrangements for accommodation
 - The financial regulations of the University
 - The University's sustainability and carbon reduction goals
- 6.1.3. Where applicable, risk assessments should include control measures relating to individual vulnerabilities and contingency plans for any issue highlighted by the FCDO which could lead to disruption or additional costs.

7. Incident Management and Reporting

- 7.1.1. It is important that individuals look after their personal safety whilst travelling. In case of an emergency, travellers should contact Security on +44(0)116 252 2023, who can, if required enact an incident response in accordance to the University's incident escalation and response activation procedure.
- 7.1.2. Furthermore, our insurers must be notified via contacting Lifeline Plus Assistance following an injury or illness that results in the need for inpatient hospital treatment, in accordance to the insurance related documentation supplied to all insured travellers. Support is also offered for any other type of claim, through AIG Lifeline Plus Assistance, who offer a 24/7 multilingual helpline, which has direct links to local in-country medical resources.
- 7.1.3. When travelling overseas, the local Embassy or Consulate is likely to be able to offer advice and support if individuals experience any issues, such as:
- Lost or stolen passports
 - Becoming a victim of crime
 - Travellers being arrested
 - National emergencies in travel location
- 7.1.4. Individuals should research in advance the contact details for the nearest Embassy or Consulate, as well as considering the information on the Government's travel advice [website](#).

- 7.1.5. In the event of any type of claim for any type of travel, the University's Insurance Office should be contacted as soon as possible on insurance@le.ac.uk or +44 (0) 116 229 7630.
- 7.1.6. Individuals should also download the SafeZone app, this provides all users with a simple mechanism for alerting the University of any incidents. Furthermore, once activated it will provide the travellers exact location, which may be vital in the case of a major incident.
- 7.1.7. It is expected that if individuals experience any issues whilst travelling they should report these to the University upon return, via the Health and Safety Services SharePoint [Page](#). In addition, to inform future trips, any other unforeseen circumstances should be fed back to the associated School or Division. Any issues relating to transport or accommodation arranged by the UTMC should be fed back to Procurement.
- 7.1.8. It is expected that those involved with authorising travel will maintain an understanding of the travel itineraries alongside being conscious of any global incidents which may affect the travellers. Where there are concerns, they should first attempt to make contact and to confirm the safety of the travellers. If no contact can be made, or an issue is identified, this should be raised to either Security or an appropriate senior manager to instigate an incident response.

8. Responsibilities

- 8.1.1. All staff and students undertaking travel and those involved in its design, development and authorisation are responsible to follow the information contained within this Policy and its associated authorisation processes. This includes undertaking the specific responsibilities set out below.
- 8.1.2. **Senior Authorisers** (e.g. Directors of Operations (DoO), Heads of Professional Service Divisions and Area Directors), will:
- Act as final authoriser for complex or high risk cases escalated to them.
 - Ensure that health and safety travel risk assessments are stored appropriately and, if required, made available should an incident occur
 - Ensure compliance with the University's financial regulations
 - Facilitate (with Health and Safety Services) travel risk assessment training and briefings for operational teams
 - Where concerns over the security relating to the travel destination become apparent, implement a system to define how information provided by the travel provider, University insurer and any other relevant parties is utilised
 - Escalate any concerns regarding the safety of any travellers to either Security or appropriate senior manager.
- 8.1.3. **Travel Authoriser** (e.g. Line Managers, Professional Service Operation Managers, Heads of Schools, Directors of Education and Area Managers) are responsible for:
- Undertaking training related to the travel and authorisation process
 - Acting as the authoriser for the majority of travel requests
 - Escalating complex or high risk trips to the Senior Authoriser for final decisions where required
 - Ensure advice is available to enable prospective travellers whose applications have been rejected to improve their application
 - Ensure budgets, costs and time for travel are planned and agreed appropriately

- Review frequency and quality of travel requests at local Health and Safety committees, noting any improvements needed and communicating this as required
- Ensuring awareness of travel itineraries, where possible maintaining frequent contact, escalating any issues of concern related to safety to either Security or to an appropriate senior manager
- If appropriate, ensure all requests for travel are risk assessed and that any risk mitigations are clearly documented and agreed with the Travel Organiser.

8.1.4. Travel Organiser (e.g. Individuals and Academic Supervisors) are responsible for:

- Giving due consideration as to the necessity of the trip. Discussing the request for travel and, if no online alternative is suitable, ensuring there is a clear rationale for travel
- Ensuring any hazards and risks associated with the travel are understood, including those related to the destination of travel, the journey itself and the activities planned
- Ensuring that an up to date travel safety guidance document is provided for all travellers, which details any generic risk control measures
- Ensuring that all travellers are suitably covered by travel insurance
- Ensuring their duties are adequately covered while travelling, as appropriate
- Ensuring the quality, and availability of emergency contact details to support a potential incident response
- Ensuring budgets, costs and time for travel are agreed appropriately
- Ensuring awareness of travel itineraries for all travellers, where possible maintaining frequent contact. Escalating any issues of concern related to safety to either Security or to an appropriate senior manager
- If appropriate, ensure that risk assessment is completed accurately and in good time (3 weeks before travel), declaring any circumstances which may affect a person's ability to travel.

8.1.5. All travellers are responsible for:

- Notifying the Travel Organiser of all relevant medical conditions, disabilities and special educational needs that may impact them during the trip, so that appropriate support can be provided and necessary mitigating controls can be implemented
- Understanding the hazards and risks arising from the destination they are travelling to, the journey and the activities they plan to undertake
- Completing all necessary stages in the travel preparation process as defined by the relevant Travel Safety Guidance document
- Acting responsibly during the trip, complying with all control measures and any arrangements set out by the risk assessment
- Downloading and understanding the use of the SafeZone app
- Registering to receive travel text message alerts from the travel insurance provider
- Ensuring that they are aware of the appropriate incident support and emergency procedures.

8.1.6. Finance Division Category Manager for Travel and Accommodation:

- Review travel and/or accommodation arrangements where the University's Travel Management Company is not used.



UNIVERSITY OF
LEICESTER

University of Leicester

University Road

Leicester, LE1 7RH, UK

w: www.le.ac.uk



[/uniofleicester](https://www.facebook.com/uniofleicester)



[uniofleicester](https://www.instagram.com/uniofleicester)



[@uniofleicester](https://twitter.com/uniofleicester)