

## 1. Introduction

### 1.1 Purpose and Scope

This document summarises:

- Our policy on travel and related expenses
- The basis on which we will reimburse expenses
- Recommended best practice to ensure optimum value for money

This policy has been approved by the RAISE committee and applies to any person who wishes to reclaim travelling expenses incurred in the performance of duties for RAISE (for example, as an invited speaker at a RAISE event, attending committee meetings etc.)

The RAISE committee is responsible for the implementation of this policy and will arbitrate in any cases of dispute.

Each expenses claim will be considered individually on a case-by-case basis.

The RAISE committee will withhold payment of any expenses not in accordance with this policy and will seek reimbursement of any invalidly paid expenses.

### 1.2 General Principles

Our policy is to reimburse any reasonable out of pocket expenses which are wholly, exclusively and necessarily incurred in the performance of duties for RAISE. All expenses claims should be pre-authorised by the relevant budget holder.

Strong budgetary control is required by budget holders to ensure that these costs represent value for money, are necessary to achieve our academic and enabling objectives and are within the agreed budget.

Expenses should therefore be necessary, appropriate and proportionate to the activity. It is the primary responsibility of claimants and authorisers to ensure this is adhered to.

## 2. Travel

### 2.1 General

Travel should be by the most cost and environmentally effective means, which is usually public transport, having regard for:

- Cost and value for money
- Reasonable comfort
- Time and duration of journeys (and connecting travel)
- Requirement for flexibility of itinerary
- Safety and wellbeing

### 2.2 Booking Travel

Booking as far as possible in advance is strongly encouraged as it is normally significantly cheaper than purchasing at the time of travel. Advance purchase rail tickets (in particular single direction, specific train tickets) provide significant opportunity to reduce costs, albeit at the risk of a loss of flexibility, and are strongly recommended.

### 2.3 Use of own vehicles

Use of private cars for long distance journeys will only be approved if this is the cheapest or most appropriate means of reaching your destination. For example, we recognise that the use of private cars will often be the most cost-effective option for short journeys, particularly if more than one person is travelling.

Use of private mileage incurred whilst on RAISE business will be reimbursed at the rate of 45p per mile for a return journey of up to 200 miles and 25p per mile thereafter. Motorcycle mileage will be reimbursed at the rate of 24p a mile and bicycles at 20p per mile.

Claims should provide full details of the journey including business purpose, starting point, places visited en route, the point which the journey ended and total business mileage.

Users of private cars, motorcycles or bicycles on RAISE business must ensure that they have insurance cover for business use and you must consider the health and safety implications before undertaking journey, especially long ones.

### 2.4 Taxis

The cost of taxis will be reimbursed if this is the cheapest or most appropriate means of reaching your destination. For example, this may be when public transport is unavailable – either early in the morning or late in the evening or where public transport would add significantly to the journey time. A receipt should always be obtained.

## 2.5 Rail Travel

Rail travel should be booked directly with the train operator. Advantage should be made of all types of 'discounted' tickets – including any discounts that may be obtained through the use of railcards. Journeys at RAISE's expense should normally be standard class. Two single tickets are often cheaper than a return ticket. Railcards should be used wherever possible to take advantage of discounts. Costs of railcards are not reimbursed.

## 2.6 Air Travel

Air travel within the UK is discouraged except where this is either less costly overall, taking account of accommodation costs, or demonstrably more convenient. If more than one airline serves a destination, you should choose the lowest cost appropriate schedule. You may accrue airline reward programme points but this must not influence your choice of airline. Journeys at RAISE's expense should normally be standard class.

## 3. Trips away from home

### 3.1 Accommodation

RAISE will reimburse accommodation charges when you are required to be away from home overnight on RAISE business.

Hotels must represent value for money should be selected on a best value basis, choosing the most economically priced room available taking advantage of any preferential rates that may have been negotiated. Costs should not exceed the following nightly limits, inclusive of tax, without prior agreement of the budget holder:

Location	Rate
London	£120
Rest of UK	£100
Rest of World	£150

Items of personal nature, such as alcoholic mini bar items, pay per view TV etc. will not be reimbursed. Where these are included in the bill, the costs must be deducted prior to submission of the bill for reimbursement. The cost of all business calls and one reasonable telephone call home per day will be refunded when included as identifiable items on an accommodation receipt. The authoriser must decide what is reasonable in all circumstances. The cost of logging onto the internet when this is used for RAISE business will be refunded.

### 3.2 Meals

If you are necessarily away from home and your normal place of work on RAISE business, you may claim for the cost of meals. Actual expenditure will be reimbursed when supported by original itemised receipts. All claims must be supported by separate receipts – except when accommodation charges are also being reimbursed, in which case a composite receipt is acceptable. Expenditure on meals must be modest and appropriate to the circumstances.

Costs should not normally exceed £20 for lunch or £35 for dinner for UK trips, including drinks. The cost of alcohol will only be refunded when taken with a meal – alcohol is not appropriate during working hours. Gratuities will not be refunded unless included on an itemised bill as a service charge and not as an addition by the claimant.

In addition to meals, snacks and refreshments may be purchased when travelling in the UK on behalf of RAISE up to a maximum of £10 in a 24 hours period. This is not an allowance and expenditure should be supported by receipts.

### 3.3 Conferences

RAISE may fund or contribute to the costs of courses, conferences or trade conventions in the course of your duty for RAISE. Those selected to attend must receive approval from the budget holder. When the costs have not been met directly by RAISE, they may be reclaimed in an expense claim.

## 4. Expense claims and payment

### 4.1 How to claim

The cost of travel and/or expenses need to be pre-approved by the relevant budget holder and reclaimed by contacting [raise@ncl.ac.uk](mailto:raise@ncl.ac.uk). Details should be provided about the claim using the expenses form found at [www.raise-network.com/resources/expenses-and-travel-policy](http://www.raise-network.com/resources/expenses-and-travel-policy), including a summary of the purpose of proposed claim, amount of reimbursement required and any other relevant information that may support the claim, along with original or electronic copies of itemized receipts.

The normal method of payment is by BACS into your nominated bank account and is made following the event/travel and when receipts have been received and approved.

Claimants must ensure that:

- Expenditure is pre-approved in advance by the relevant budget holder
- All expenses claimed are necessarily and wholly incurred on RAISE business, consistent with this policy, represent value for money and are appropriate and proportionate.
- Claims are fully completed – giving details of journey, purpose of travel etc.
- Original receipts are produced on all occasions except where it would be impossible to obtain receipts – examples being some tube fares and parking meter charges.

### 4.2 Approval of Claims

Authorisers must review claims and ensure that:

- The expenses were properly and necessarily incurred on behalf of RAISE;
- The claim has been correctly completed and complies with this policy;
- As far as the authoriser is aware, there has not been any previous payment against the claim from whatever source.