



## UNIVERSITY OF EXETER

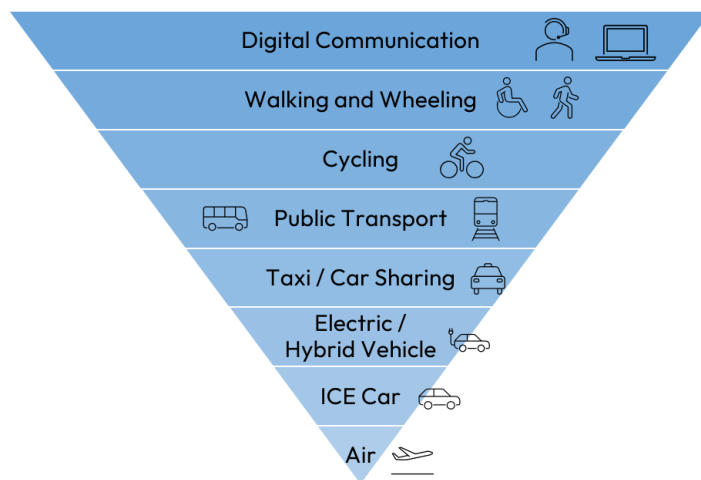
### Travel Policy

Date of Approval:	Sept-2023	Review Date:	Sept-2024
Author and Lead:	Ben Lawlor, Insurance, Audit and Risk Manager Contributors: University travel team (members of HR, Procurement, Environment/ Sustainability, Health and Safety and SSC)		
Aims:	As a global University that engages with the world through research, field trips, conferences and collaborations the University recognises that travel may be necessary for learning, teaching, research and developing partnerships. The aims of this policy are to ensure that travel is undertaken in accordance with our values and to meet wider university targets and objectives relating to sustainability, cost, compliance, equality, diversity and safety requirements.		
Scope:	<p>This Standard applies to all staff and students of the University of Exeter who are required to travel as part of work or study requirements.</p> <p>This policy <b>does not</b> apply to:</p> <ul style="list-style-type: none"> <li>• UG and PGT Study and work abroad placements. These are managed centrally by the Global Opportunities Team. Further information can be found on their webpage: <a href="#">Go Abroad</a>. The Global Opportunities Team has processes in place to risk assess and authorise travel where appropriate, and to locate travellers and provide support in the event of an incident.</li> <li>• Travel for UoE Sports Clubs. This is governed by a separate policy and does not fall under this policy. Details can be found on the <a href="#">Student Sport Committee area</a> or by contacting <a href="mailto:uadmin@exeter.ac.uk">uadmin@exeter.ac.uk</a>.</li> <li>• This policy does not apply to staff and students who are travelling to access the workplace / place of study if this is part of their normal commute. This is covered by the University's Sustainable Travel Plan.</li> </ul>		
Relevant Legislation:	Health and Safety at Work Act 1974 Management of Health and Safety at Work Regulations		
University Commitments	<p>To be carbon net-zero by 2030.</p> <p>To be recognised as an Environment and Sustainability leader across the University sector, nationally and internationally by 2025, and first in the Russell Group Universities in key sustainability benchmarks.</p> <p>The University is committed to ensuring the safety, health and wellbeing of all staff, students, contractors and visitors to its campuses.</p>		
Definitions:	<p>Inter-campus travel – Travel between University campuses (Exeter/Cornwall)</p> <p>International travel – Travel overseas relating to University activity</p> <p>Domestic travel – Travel solely within the United Kingdom relating to University activity</p> <p>Intra-Country travel – Non-domestic travel (no borders crossed)</p>		
Responsibility for adherence:	<ul style="list-style-type: none"> <li>• All staff who are required to travel on University business, study or research, irrespective of the origin of the source of funding, including research funding.</li> <li>• All staff undertaking international travel to academic conferences, international visits to other institutions etc, including where this travel is paid for by another institution or establishment.</li> <li>• All staff responsible for approving the essential nature of staff international travel.</li> <li>• All staff responsible for approving student international travel for research, study, fieldwork and fieldtrips, irrespective of the source of funding, including trips for which the student arranges and pays for their own travel.</li> <li>• All staff based overseas travelling inward</li> </ul>		
Training availability:	Training and advice is available for University staff planning to travel internationally. This covers-how to risk assess, approval route and insurance processes. All staff completing a travel risk assessment for the		

	<p>first time are strongly recommended to complete the training, to ensure their-planning and risk assessment meets the University Requirements.</p> <p>Training is available for all staff responsible for approving travel, setting out key elements that must be verified and where further escalation is required. Those approving travel for the first time are strongly recommended to complete the approval training to ensure they are meeting the University requirements prior to approving international travel.</p> <p>Training and guidance will be developed to support staff in adopting climate conscious travel and to understand and interpret travel emissions data and information.</p>		
Requirements:	Accountability	Reference documents and information	
Safety			
	<p><b><u>Intercampus and Domestic UK Travel (not including fieldtrips, see section 3)</u></b></p> <p>The University is committed to the safety, health and wellbeing of all its travellers, to ensure incidents, accidents, harm, loss or damage is prevented. A travel risk assessment is in place for intercampus and UK travel which should be reviewed by the traveller and amended to reflect their specific risks should the risk assessment not cover this. A copy of this can be found on the Travel Sharepoint site.</p> <p>If amendments to the UK Travel risk assessment are required for an individual, due to their personal circumstances, managers / supervisors should be made aware of any new / changed risks, discuss these with the individual and approve the revised risk assessment once assurance is gained that appropriate controls are in place. This risk assessment should be reviewed by the individual traveller annually or in the event of a significant change and repeating the approval process where changes are made.</p> <p>If any person is hiring or using their own vehicle to carry out work, they must ensure they are compliant with the University’s Driving for Work Standard. The <b><u>Driving for Work Standard</u></b> applies to all drivers that drive all types of vehicles for University business, who must follow the requirements of the Standard to become an ‘Authorised Driver’. The types of vehicles typically used by University staff for University business include use of private vehicles for University business (which must be adequately maintained and insured).</p> <p>For information about how you can travel between the University’s Exeter campuses using sustainable options, i.e. travelling by <a href="#">foot</a>, by <a href="#">bike</a>, by <a href="#">bus/coach</a>, by <a href="#">rail</a>, by motorbike or by <a href="#">car sharing</a>, guidance can be found on the University’s Sustainability pages <a href="https://www.exeter.ac.uk/about/sustainability/travel/">https://www.exeter.ac.uk/about/sustainability/travel/</a></p>	<ul style="list-style-type: none"> <li>• Health and Safety Team</li> <li>• Individual traveller and their manager</li> <li>• Any person using own vehicle for work purposes</li> </ul>	<p>General Travel risk assessment</p> <p>Driving for work standard</p>
	<p><b><u>International Travel</u></b></p> <p><b>All</b> travellers going overseas on University related business <b>must</b> risk assess and plan their travel and take all required steps in travel booking to ensure insurance is in place. This process includes ensuring:</p>	<ul style="list-style-type: none"> <li>• Members of staff booking trips on behalf of others (e.g. PA or</li> </ul>	<p>Travel Risk Assessment System (Not yet active – please continue to</p>

	<ul style="list-style-type: none"> <li>- All international travel must be risk assessed and the risk assessment must be documented by the traveller</li> <li>- The Risk Assessment and travel plans must be approved by the nominated approver.</li> </ul> <p>All travel is approved by the relevant nominated personnel. It is responsibility of the Faculty / Department / Directorate to nominate an Approver and they should attend training to ensure they have the skills and understanding to approve the travel including whether it is justified from a carbon emissions perspective. Faculties and PS are recommended to document the local arrangements.</p> <p><b>Approval of the risk assessment, funding, carbon emissions and travel plans must be given before travel is booked.</b></p> <p>It is the responsibility of the Faculty / Department / Directorate to ensure that a sufficient number / representative / competent Approvers are in place to approve international travel.</p> <p>The Faculty and division should also consider the individual's reasonable adjustments, if any agreed, for the duration of the trip. Training for Approvers is available via the Insurance, Audit and Risk Team and guidance documentation is available on the University Insurance site. Advice on international travel and risk assessment can be sought from the Health and Safety Team.</p> <p>Travel to higher risk (as defined by the FCDO <a href="https://www.gov.uk/foreign-travel-advice">https://www.gov.uk/foreign-travel-advice</a>) and/or sanctioned destinations (detailed on the University Insurance web pages) must be escalated to Insurance@exeter.ac.uk giving reasonable time (at least 14 days) for the Insurance Team to obtain confirmation of insurance. Travel can only proceed if appropriate insurance is obtained.</p> <p><b>If travellers are visiting areas deemed high or very high risk by the FCDO (amber or red), additional approval of the risk assessment must be sought by Heads of Departments (for areas rated as amber) or Directors of Faculty Operations (for areas rated as red).</b></p> <p>Once fully approved, the traveller must complete the <a href="#">online travel form</a> to ensure the trip will be registered for insurance and emergency travel alerts without any further action UNLESS travel is planned to a sanctioned country or high-risk destination or where the booking is <b>not</b> made via the University Travel Management Company (TMC) - please refer to section 7.</p> <p><b>Once travel approval has been granted, it is the responsibility of the traveller to review the risk assessment, keeping it up to date with any changes and letting the approver know if there has been a material change to the risk.</b></p>	<p>Administrative Support)</p> <ul style="list-style-type: none"> <li>• Approvers of travel risk assessments</li> <li>• Faculty / Department / Directorate</li> </ul>	<p>use Word templates)</p>
	<p><b><u>Fieldtrips or Fieldwork (where students will be in attendance)</u></b></p> <p>Details of all travellers attached to the trip must be provided to the insurance team prior to departure, so that insurance is put in place.</p>	<ul style="list-style-type: none"> <li>• Fieldtrip Leads</li> <li>• College Administrative Support</li> <li>• Insurance Audit and Risk Team</li> </ul>	

		<ul style="list-style-type: none"> <li>• Health and Safety Team</li> </ul>	
<b>Sustainability</b>			
	<p>The University of Exeter is committed to achieving carbon net zero status by 2030. Its Environment and Climate Emergency Policy places responsibility on all members of the University community to take control of their impact on carbon emissions and feel supported in delivering carbon savings.</p> <p>Business travel accounted for 7% (5,980 tCO<sub>2</sub>e) of the University's carbon footprint in 2021/22. In order to meet the University's net zero target, which has been set in line with the trajectory to limit warming to 1.5°C, we must significantly reduce emissions from business travel by staff and students reducing the amount they travel and selecting sustainable travel modes whether that is for study, field trips, research or university business.</p> <p>This guidance does not seek to limit travel, just to focus necessary travel on low-carbon options.</p> <p>Where activity forms part of an externally funded research project, the funder may require a 'Sustainability Plan' as part of the application for funding. In addition, funders may require evidence of due consideration for environmental impact for any travel. Always check funder terms and conditions alongside this policy when applying or claiming for external funding.</p> <p><b><u>Preferred mode of travel</u></b></p> <p>When travel is necessary staff and students must prioritise low-carbon travel options. The travel hierarchy shows the carbon efficiency of different travel modes. There may be occasions when it is not possible to follow the travel hierarchy, such as:</p> <ul style="list-style-type: none"> <li>• Safety considerations</li> <li>• Disability or health conditions</li> <li>• Caring responsibilities, where a longer time away would mean you would be unable to make the trip</li> <li>• Contractual obligations from external partners require you to follow their travel policy</li> </ul>	<p>All University staff and students</p>	



Staff and students must adopt climate conscious travel behaviours and choices when undertaking travel on University business.

The term “climate conscious travel” is achieved when the travel choices that staff and students make are informed by the environmental impact that they have, and preference is given towards virtual collaboration and lower carbon travel modes. In practice, the environmental cost of travel is prioritised over the financial cost and individual convenience, but not over individual safety considerations.

Staff and students must consider what travel is essential for supporting their academic and business objectives. The University recognises that some travel is essential for supporting these objectives. However, wherever possible the number of trips and travellers should be limited to those that are deemed essential and, where possible, undertake other work for the University while there. (but even ensuring this does not mean that the emissions impact can be overlooked)

Flights must not be used to travel domestically or to destinations served by Eurostar, unless travelling by train would prevent attending an essential event or meeting due to EDI considerations.

The University’s [Additional/Out of Hours Working Policy](#) allows staff to take time off when undertaking an overseas trip which includes working/travelling at weekends where this is an essential requirement of the job.

Refer to the University’s [Expenses Policy](#) for permitted ticket types.

**Before booking any travel, the following should be considered:**

1. Can you achieve your goals using virtual methods?
2. Can you achieve your goals using low-carbon travel modes?

*When undertaking international travel staff should ensure that they maximise opportunities to deliver on as many aspects of our Global Strategy as possible.*

### **Defining well-justified emissions**

This guidance is provided to assist staff and students in determining whether a specific journey is well-justified for progressing academic, educational or business objectives. The travel approver (see section 2) must consider if the travel is well-justified from a carbon perspective when approving travel.

<b>Group</b>	<b>Well-justified emissions <i>Potentially suitable for travel</i></b>	<b>Poorly-justified emissions <i>Generally not suitable for carbon-intensive travel</i></b>
All	Key meetings to establish collaborations and trust Research/study trips or fieldwork that cannot be carried out locally or virtually Travel subject to contractual obligations with external partners (although virtual communication approaches should be requested) Public engagement/outreach events that cannot be carried out locally or online. To support the recruitment of international students to meet the University targets where this cannot be carried out by local partners or online.	Regular meetings with colleagues/collaborators Travelling without presenting new research results Travelling for short durations without significant associated opportunities or outputs (e.g. to only give a short talk) Where goals could be achieved with fewer travellers Attending a workshop or meeting not directly related to own research, study or work. Speeches and lectures that could be given virtually instead
Early and mid-career	Key opportunities for networking and building relationships, including finding new collaborators or career development opportunities. Presenting and promoting work/research at conferences and meetings Attending key training not available locally.	
Senior staff	When in-person interaction is expected to provide a significantly more successful fundraising/negotiating outcome. Conferences/meetings where there are significant associated opportunities or outputs.	

*This guidance is adapted from the University of Cambridge Sustainable Travel Guidelines.*

The Carbon Footprint calculator on the University's website can be used [Travel | Finance Services | University of Exeter](#)

### **Offsetting**

The University is currently developing its approach to offsetting as part of the achievement of its net zero target. While this approach is being developed, if you wish to offset you should ensure that you use a [Gold Standard Offsetting Scheme](#). If the funder of the travel (e.g. Research Funder) will cover the costs of offsets, then you should offset emissions and claim the costs from the funder.

No offsetting approach actually removes carbon emissions from the atmosphere within the time frame needed to meet our 2030 net-zero aim. So, as the university is not currently supporting offsetting approaches, any emissions from booked travel must still be assessed against their original emissions and any perceived reduction due to offsetting approaches must be ignored.

## Cost

### Booking Travel

Only once insurance and approval has been confirmed can the trip be booked via the University's Travel Management Company (TMC). The booking process will require confirmation that insurance and formal approval have been completed.

Bookings made via the TMC will trigger travel alerts to the traveller (providing the traveller has documented their mobile number in their account profile) specific to their trip and enable reporting to;

- (a) formally register for insurance, and
- (b) allow the University to locate and support travellers should an incident occur.

Staff who are accompanied by family/others on trips or who choose to add holiday to the start or end of their University trip must book these via the University travel management company offline (telephone/email) & pay the travel costs for their family/others or extra accommodation/transport by personal credit card at the time of booking. For assistance with these bookings and travel arrangements including where additional services/advice may be needed to enable travel please contact:

- Ruby Team: [ruby@keytravel.com](mailto:ruby@keytravel.com) or tel. 0161 819 6860
- Specialist travel including group  
travel: [groups@keytravel.com](mailto:groups@keytravel.com) or 0161 819 8935
- Visas & Passports: [keytravel@cibtvisas.co.uk](mailto:keytravel@cibtvisas.co.uk) or tel. 0207 843 9678

For any emergencies related to your travel booking please contact the Key Travel reservation team for any travel enquires during office hours (UK time: 08.45-17.30 Mon-Fri, 0900-1300 Saturdays).

In the event of an emergency outside of these hours you can reach Key Travel on (UK and Europe) +44 (0)20 7843 9602, North America +1 646 289 6808.

### **Agreed Exceptions Process – To be followed only with express authorisation**

An exceptions process has been agreed for bookings that cannot be made via the University travel partners. Reasonable cause to use the exceptions process are:

- Travel organized via an approved partner (e.g. overseas government department, grant funder/sponsor or conference organising committee) that is not available to book via the travel partner. Note that a request should be made to Procurement to include the partner as a vendor and Staff are advised to check comparable costs for journey via the Key Travel booking tool to ensure the costs of booking via approved partners are best value.
- Travel included within research funding where the cost for a comparable refundable/cancellable option is prohibitive compared to alternative providers

A University purchase card must be used for all 'exceptions' bookings. Details of the trip must be registered in addition to the

- Travellers
- Members of staff booking trips on behalf of others (e.g. PA or Administrative Support)
- Procurement
- SSC

[Key Travel Booking](#)

	<p>risk assessment and approval process already followed (for international travel). This enables reporting to (a) formally register for insurance, and (b) allow the University to locate and support travellers should an incident occur.</p> <p><b>For trips booked outside of compliance with this policy, the University reserves the right to withhold the reimbursement of related expenses and apply disciplinary procedures.</b></p> <p>Further guidance and FAQs can be found on the <a href="#">Finance – Travel page</a></p>		
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**Equality, Diversity and inclusion**

	<p>The University recognises its duty to make reasonable adjustments for disabled staff and students (which may also include those with long-term health conditions). Such reasonable adjustments for disability could include adjustments to the mode of travel, class/comfort, route, use of public transport, or being accompanied by a companion/guide.</p> <p>The University recognises that departments may need to make exceptions and suitable alternative arrangements on the basis of an individual’s protected characteristics to take account of the needs and safety of the person travelling, or to avoid direct or indirect discrimination (as disclosed in any travel risk assessment).</p> <p>Such arrangements could include adjustments to the mode of travel, travel class, route, use of public transport, travelling with a child, or bringing a companion to help care for a child or additional safety provisions to address specific needs of individuals.</p> <p>Exceptions to the Policy may also be valid in cases due to medical conditions which do not amount to a disability (e.g. a short-term impairment), where the requirements of the Policy are impractical, in emergency situations, and in other exceptional circumstances.</p>	<p>All University staff and students</p>	
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**Compliance**

	<p><b><u>Insurance Arrangements and Claims</u></b></p> <p>Travel to higher risk/sanctioned destinations must be escalated to <a href="mailto:insurance@exeter.ac.uk">insurance@exeter.ac.uk</a> giving reasonable time (at least 14 days) for Insurance Colleagues to assess and find insurance. Travel will only be permitted to proceed when appropriate insurance is obtained.</p> <p><b>In the event of an emergency while overseas, contact the insurance emergency telephone number, available on the Travel Emergencies and Claims web page. The insurer will make arrangements on your behalf as far as possible.</b></p> <p><b>During University working hours the Insurance, Audit &amp; Risk office can also be contacted on + 44 (0)1392 723087. Outside of office hours, Estate Patrol can be contacted on + 44 (0)1392 723999. You should also inform your Faculty or Directorate contact of your situation.</b></p> <p>In the event of a theft or loss, you must obtain a crime number from the local Police, as evidence for your claim.</p>	<ul style="list-style-type: none"> <li>• Traveller</li> <li>• Insurance, Audit and Risk Team</li> </ul>	
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	<p>Every claim will require a claim form. These are available by type of claim (Medical Expenses; Travel Cancellation; Personal Accident and Personal Property) from the Travel Emergencies and Claims webpage.</p> <p>Supporting documentation is required by the insurer to consider your claim, and is also set out on the Travel Emergencies and Claims webpage.</p> <p>The relevant completed claim form and supporting documentation must be sent to <a href="mailto:Insurance@Exeter.ac.uk">Insurance@Exeter.ac.uk</a> for onward referral to the insurer. If the claim payment is to be made to the Faculty or Division, please do not complete the bank details section of the form, but provide the cost code for the payment to be made to.</p> <p>The Insurer may contact you directly if they require additional information on receipt of the claim, or they may request this via the Insurance Team.</p>		
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	<p><b><u>Visa and Immigration Law</u></b></p> <p>We must ensure compliance with immigration law, with staff overseas trips greater than 3 months validated against the destination location employment law and local corporation tax requirements. Global Mobility policy and processes have been developed to manage this.</p> <p>Any staff trips overseas for a period greater than 3 months are referred to Global Mobility prior to booking to support immigration law and tax compliance</p> <p>Any staff trips overseas for a period greater than 12 months (in addition to the HR notification above) are referred to <a href="mailto:Insurance@exeter.ac.uk">Insurance@exeter.ac.uk</a> to arrange additional insurance, Note that an extra premium will be charged for this, and the traveller will be expected to arrange some additional elements of cover personally, such as health insurance and contents insurance for their belongings.</p>	Traveller	
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**Standard Monitoring and Measurement Criteria**

Annually, the University Travel Team will assess that this policy is being adhered to and that risks to safety, EDI, finance, Environment and HR around travel are being managed effectively.

Specifically the following will be measured:

	<p>The total number of international trips conducted, and the maximum, minimum and average duration (for future insurance purposes and for reconciliation to travel risk assessments to monitor compliance)</p>		
	<p>The total number of trips conducted to “higher risk countries”, and the maximum, minimum and average duration. Validation of the number of trips referred to the insurer in accordance with the advance notice clause (for future insurance purposes)</p>		
	<p>The total number of trips conducted split by insurance region (USA; International (Europe), Rest of the World), and the maximum, minimum and average duration for each(for future insurance purposes)</p>		
	<p>The Sustainability Team will provide regular reports on the carbon associated with business travel at University, Faculty and Divisional level.</p>		
	<p>The Advocate Climate Taskforce (ACT) will monitor the effectiveness of this policy in reducing carbon emission from business travel and make recommendations if these are not reducing at a rate sufficient to meet our net zero target.</p>		
	<p>Any trips over 3 months have been assessed by HR</p>		

	A sample of trips will be assessed by the Safety Team on trips registered to ensure that the relevant risk assessment and approval process has been followed, risk assessment suitability and sufficiency is adequate and check that Training has been carried out by the traveller and approver
	A review of complaints, claims and issues reported relating to Travel and the travel policy have been discussed by the Travel Team and action taken as required to address
	The Co-opted travel team meet during the year to review the effectiveness of the travel management arrangements. Actions are recorded and monitored.
Outcomes of the assessment relating to this review will be reported to the Compliance Committee, annually. As well as being shared with the insurer to inform future premium costs (1-3) measurements for sustainability will be reported to the Climate and Environmental Crisis (CEC) Board.	
<b>Version control</b>	
V1.7 Final Draft – Updated following discussion at ACT and the CEC Board.	
V1.8 Updated Final Draft – Including consideration for all consultation comments	