

## University Staff Travel Policy and Procedures

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<b>Directorate\team:</b>		<b>Directorate: Professional Services</b> <b>Team: Finance &amp; Procurement</b>	
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2	<p>Climate considerations embedded within the Policy.</p> <p>Alternatives must be considered with more emphasis on why travel is needed.</p> <p>Formal framework of decision making to ensure decisions are documented, auditable and consistent.</p>	May 2026	UEB 5/5/26

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## 1. Policy Statement

The University's Staff travel is co-ordinated by an appointed Travel Management Company (TMC). The Travel Policy is mandatory and supports the delivery of the University's Travel Plan, which can be accessed via the [University Policy Library](#). The policy prioritises the safety of our staff and the University's climate action plan. The Finance and Procurement Service are responsible for the management of the contract with the TMC on behalf of the University.

## 2. Purpose & Scope

2.1 University Travel is managed by a TMC. This document sets out applicable policies and procedures for the University's TMC including:

- The University's principles of travel.
- The University commitments to staff.
- The information, guidelines and rules that enable staff to travel safely.
- The transparent reporting of the climate impact of travel.
- The booking process required to travel.

2.2 This policy applies to everyone working for or on behalf of the University (referred to collectively as 'staff') for the purposes of this policy, 'staff' includes:

- Employees of the University.
- Members of the Board of Governors and other Committee members.
- Employees directly or deemed employed by subsidiary or associated companies.
- Employees directly or indirectly employed by overseas offices and branches.
- Associate lecturers.
- Casual workers employed by the University.
- Agency staff working for the University.
- Students undertaking work experience placements at the University and in receipt of funded travel.
- PhD students travelling and representing the University in the capacity of an employee.

2.3 This policy applies to all travel \*

UK rail and air travel  
UK accommodation  
International travel  
Overseas accommodation  
Conferences

\*Exclusions apply: UK vehicle hire, UK coach hire, Local taxis, Travel between University campuses, Business mileage, Travel booked and paid for by an organisation other than the University.

2.4 This policy will be reviewed at least every two years.

2.5 Where travel is organised and paid for by an external organisation, the Policy for Claiming Travel, Hospitality and Other Business applies [Gifts and Hospitality Guide](#) and [Staff expenses](#). Insurance must be arranged by completing a form accessible via [TRequests@shu.ac.uk](mailto:TRequests@shu.ac.uk)

### **3. The University's Principles of Travel**

3.1 "Business travel" is defined as a journey necessarily undertaken by staff to carry out their duties for the University, or to attend conferences or training events directly related to the performance of those duties.

3.2 This includes travel between:

- A permanent workplace and a temporary workplace.
- Home and a temporary workplace.
- Two temporary workplaces.

3.3 Subsistence will be paid in line with the University's Staff Expenses Policy.

3.4 The University will pay for relevant business expenses associated with staff travel via the expenses process, e.g. vaccinations and visas, in line with the University's staff expenses policy hosted within the [University Policy Library](#).

3.5 For staff whose normal place of work is Sheffield, accommodation in Sheffield should only be booked where there is an exceptionally agreed reason for a particular business need. Where such an exception is agreed, it should be noted that this will be treated as a taxable benefit, although the University may agree to pick up the tax cost under our PAYE Settlement Agreement with associated additional costs (for more detail see the [University Policy Library](#)).

### **4. Needs Assessment**

4.1 The key principles of Personal Safety, Business Need, Financial and Climate impact must be tested during the decision-making process to evidence transparent responsible decision making.

4.2 Considerations must include:

- Business need.
- Alternative options to reduce the need to travel.
- Risks associated with travel.
- Equity Equality Diversity and Inclusion requirements.
- Supporting the institution's mission to reduce greenhouse gas emissions under its Climate Action Plan ([University Strategy](#)).
- Cost.
- Advance booking advantages.

4.3 The decision maker is responsible for considering and applying the University objectives as highlighted in the table below including:

1. Undertaking an assessment on a trip-by-trip basis that considers value for money and climate impact.
2. Evidencing the decision to travel and the considerations applied that meet the principles set out in the policy.
3. Gaining financial approval and agreement to spend in accordance with [Financial Regulations](#).

4.4 Any travel plans that do not comply with the policies as set out should be escalated in accordance with the defined governance and decision making herein.

## 5. Organisational Objectives

Objectives	Achieve the University's overall objectives minimising the financial and climate impact of any travel		
Principles	Conduct & Personal Safety	Legality & Duty of Care	Fairness & Consistency
	Accountability, Transparency & Contestability		
Underpinning Principles	Business Need	Climate	Financial

### Relevant Principle: **Accountability, Contestability and Transparency**

The University and its staff endeavour to live up to the expectations of our stakeholders and accept responsibility for any decision taken to travel.

We ensure that travel requirements are considered, balanced and decisions are documented.

#### 5.1 Staff must:

- Be able to provide clear, accurate and meaningful information about the need to travel and explain how (and if necessary, why) it is being used
- Keep auditable records of the business case, decision and approval
- Take into consideration any relevant codes of practice and sector specific guidance

## Relevant Principle: **Conduct, Personal Safety**

We travel ethically and responsibly and in line with University policies, procedures, and contracts.

### 5.2 Staff must:

- Comply with all applicable laws and regulations.
- Ensure the 'Travel Insurance Cover Summary' document is observed. This provides details of the cover and also what to do in case of an emergency overseas.
- Be aware of and follow the 'Standards and Expectations Statement for Fieldwork' and accompanying guidance.
- Comply with the University's Code of Behaviour which is available for review in the [University Policy Library](#). All colleagues, clients and business partners should be shown respect and courtesy, taking into consideration local laws, sensitivities and customs.
- Comply with the University's Alcohol, Drugs and/or Other Substances Policy located in the [University Policy Library](#).
- Be respectful and courteous, taking into consideration local laws, sensitivities and customs.
- Declare any conflicts of interest.
- Comply with the University's Anti Bribery Policy and the Staff Expenses Policy which are located in the [University Policy Library](#).
- Read relevant University guidance on legal compliance
- Seek advice from University specialist services where they are unsure of the legal/compliance requirements.
- Make decisions to help us deliver our institutional mission to reduce our climate impact and become one of the greenest and most sustainable institutions in the country. Please refer to the following page on the intranet: [University Strategy](#).

## Relevant Principle: **Legality & Duty of Care**

We ensure that our decision and the modes of transportation are in line with applicable law.

### 5.3 Staff must:

- Obtain the appropriate visas for the countries which they are travelling to.
- Ensure transparency for line managers by preparing and retaining details of all travel arrangements including itinerary details prior to the trip taking place.
- Not travel to a country if the Foreign, Commonwealth & Development Office (FCDO) has advised against all or all but essential travel.
- Contact the 24/7 Insurance Helpline in the event of emergency assistance.

- Ensure a risk assessment is completed, appropriate to the level of risk, relating to travel and activities being undertaken and report any incident which impacts on the safety of the traveller(s) or the reputation of the University. The incident must be reported immediately to the University for management to take appropriate actions. For advice and guidance please see the following link: [Health and safety](#).

#### Relevant Principle: **Fairness and Consistency**

We will actively work to ensure that our choice and methods of transport are fair and reasonable and do not discriminate against individuals or groups on the basis of any protected characteristic.

#### 5.4 Staff must:

- Use appropriate transportation methods that they are prepared to justify and explain.
- Take responsibility for their actions when travelling.
- Travel by economy or standard class or in accordance with the exceptions as outlined in the Long Distance Policy.
- Seek advice from the University's specialist support services (e.g. Health & Safety, Information Governance, Insurance, Finance and Procurement) to inform decisions about appropriate mode of transport.

## **6. Governance and Decision Making**

6.1 Cases that contravene the Travel Policy must be approved by a UEB member including the request for any non-economy flights. If the request for non-economy flight relates to a UEB member, the approval of the Vice Chancellor is required. Clear evidence must be provided showing that every reasonable effort has been made to use the TMC.

6.2 Directors/Deans of Colleges will ensure awareness of and compliance with this policy in their respective directorates and colleges.

6.3 Any contravention or non-compliance with the Travel Policy may result in a refusal to reimburse costs. Any attempt to by-pass the mandated policy detailed in section 4 will result in the expense claim being rejected (in line with the University's Staff Expenses Policy) and not paid. Any purchase card expenses may be rejected in line with the University's Purchase Card Policy (please refer to the [University Policy Library](#)) and may result in the University invoking the Problem Resolution Framework.

6.4 Any personal decision to upgrade from economy travel will not be reimbursed. The TMC are able to facilitate this request, and a direct personal payment will be required upon booking. The Finance and Procurement Service are responsible for monitoring and reporting on the adherence to the Travel Policy.

6.5 In the event that the TMC is unable to supply, please contact the Procurement Team for advice.

## 7. Advice and Guidance

7.1 Professional Services supporting teams have responsibility for regulation, and codes of practice in their respective areas. All teams are responsible for publishing guidance as appropriate and providing advice to staff to aid the consideration of travel, develop appropriate arrangements, and to respond to specific matters or queries in relation to their subject matter expertise.

7.2 Staff are expected to review the Intranet for the most up to date information, policies and procedures with respect to Finance, Insurance, Health & Safety and Information Governance.

7.3 The University will provide business travel insurance to employees who are required to travel on University business and who have complied with all the relevant policies and procedures. Further detail in relation to the Insurance Policy can be reviewed at [Business travel insurance](#).

7.4 Staff must take responsibility for their own safety and that of others. All staff should follow the University's Health & Safety guidance (please refer to the [University Policy Library](#)). The University will not be held responsible for employees who have put themselves at unnecessary risk, jeopardised their safety and that of others, or acted irresponsibly in any way.

Scenario	Economy	Premium Economy	Business Class	Authorisation Required
Flights below seven hours	Mandatory	Not Permitted	Not Permitted	Budget Holder
Exceptional personal circumstances where applicable including pre-existing medical conditions	Default	Permitted	Permitted	UEB Member Approval Required
Flight over 7 hours and no rest period possible	Permitted	Preferred Option	Considered only if Premium Economy not available	Budget holder / UEB (if Business)
More than 10 hours of flight in one (multi-leg) trip	Permitted	Considered	UEB member	UEB Member Approval required

			approval required	
More than 2 trips in any 30-day period	Permitted	Considered	UEB member approval required	UEB member approval required
Directly paid by a 3rd party	As per third-party policy	As per third-party policy	As per third-party policy	Third- Party Policy Applies
Personal choice/option (for process see the <a href="#">Finance and Procurement Policy Library</a> )	Permitted	Permitted	Permitted	Paid By Individual

## 8. Long Distance Flight Policy

8.1 The University recognises its commitment to staff well-being, especially when travel is complex or long-distance and the policy allows for other classes of travel in particular circumstances which are detailed above.

8.2 Where flight time exceeds seven hours a rest period of up to 24 hours can be taken upon arrival at destination/return home.

8.3 Employees who travel internationally on University business and who subsequently take a period of annual leave before returning to the UK will not be entitled to the rest period upon their return home.

8.4 Rest days allocated after international travel may not be banked.

8.5 Weekends, statutory holidays, and University closure days are compensated at a rate of a day off for a day worked and should be agreed in principle before the visit takes place.

## 9. Booking System

9.1 For details of how to gain access to the TMC online booking system and/or how to book offline (via email or telephone) please see detailed instructions on the intranet [staff travel](#).

## 10. Price changes

10.1 A tolerance level of 10% has been set by the University. If the price of the booking increases after the booking has been authorised but before it has been confirmed and it is within the 10% tolerance level, the booking will not require further authorisation.

## 11. Payment

11.1 All travel bookings made via the TMC are made 'on account'.

11.2 Confirmed bookings will be charged directly to the University against the activity code (budget) chosen at the time of booking. Bookers are not required to raise a purchase order requisition or use their University purchase card.

11.3 On receipt of the invoice, the Finance and Procurement Directorate will email a copy of the invoice to the booker and traveller to advise that the invoice will be paid unless otherwise instructed.

## **12. Cancellations / amendments to bookings**

12.1 Cancellations to hotel bookings can be made using the TMC online portal (subject to booking rules). Staff should contact the TMC directly to discuss any other booking amendments or cancellations.

## **13. Insurance**

13.1 Online bookings: The travel insurance document is included in the trip booking confirmation email.

13.2 Offline bookings: Upon confirmation of the booking the booker will receive an email confirming the trip details. This email will include the SHU travel insurance document.