

# Procedures for Staff & Student Travel

<b>Policy Category:</b>	General
<b>Subject:</b>	Travel by staff, taught students, PGR/MRes students
<b>Approving Authority:</b>	SMT
<b>Responsible Officer:</b>	Senior Vice-President (Operations)
<b>Responsible Office:</b>	Senior Vice-President (Operations)
<b>Related Procedures:</b>	<a href="#">Controversial and dangerous research guidance</a> <a href="#">Procedure and guidance for the management of fieldwork activities</a> <a href="#">Financial Procedures</a>
<b>Related College Policies:</b>	<a href="#">Staff &amp; PGR/MRes Travel Policy</a> <a href="#">Taught Student Travel Policy</a> <a href="#">Financial Regulations</a> <a href="#">Insurance Procedures</a> <a href="#">Risk Management Policy</a> <a href="#">Health and Safety Policy</a>
<b>Effective Date:</b>	24 September 2020
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## 1. Purpose & Scope

- 1.1 These procedures set out the arrangements in place to support members of the university who need to travel in order to undertake any work on behalf of the university or in connection with their studies at the university. There are a wide number of factors to be taken into account when arranging travel and when travelling. This document highlights the most important considerations and signposts other key sources of guidance within the university.
- 1.2 The procedures address travel arrangements both domestically and outside of the UK. This includes arrangements for the planning and approval of such trips, procurement of travel and accommodation, health and safety and risk management considerations.
- 1.3 The focus of the policy and its related procedures is travel that is outside the usual day-to-day business of an individual (unless travel outside of London is an integral part of the role). It is not intended to place an additional, onerous burden on those travelling on behalf of the university in making an assessment of their risk, but rather is meant to focus travellers on the additional risks and hazards which are attached to their proposed travel plans over and above those risks and hazards which may be attached to their routine, day-to-day business.
- 1.4 The procedures apply to all staff, contractors, students, volunteers, members of College Council or its standing committees, or other affiliates of the university and anyone who travels on behalf of, or at the expense of, the university. This includes any travel which is supported by third parties, such as research funders.

- 1.5 In conjunction with the university's [travel policies](#) these procedures are intended to assist the university in effectively discharging its obligations as a responsible employer and its safeguarding responsibilities toward students, and to ensure that anyone who travels on its behalf does so safely. It is also intended to assist the university in ensuring that it achieves best value for money and remains compliant with the procurement rules.
- 1.6 Travellers should familiarise themselves with the relevant [travel policy](#) before applying for authorisation to travel.

## **2. Definitions**

- 2.1 "Staff Traveller" refers to any staff member, contractor, PGR/MRes student, volunteer or member of College Council or its standing committees or other affiliate who is travelling on behalf of the university or in relation to any business or activity connected with study at the university.
- 2.2 "Student Traveller" refers to any taught student, who is travelling on behalf of the university or in relation to any business or activity connected with study, co- or extra-curricular activity at the university.

## **3. Travel Risk Assessment and Planning**

- 3.1 A risk assessment must be undertaken for travel which goes beyond the usual day-to-day business of the staff or student traveller (unless travel outside of London is an integral part of the role). For straightforward trips, such as travel to business premises, academic or professional conferences, or another UK university a simple informal assessment of the potential risks and consideration of any mitigating actions will suffice, but must include full consideration of any public health advice. Where the proposed travel is to remote locations in the UK, in adverse conditions, or to an international destination, a full risk assessment must be undertaken.
- 3.2 When travel involves a class group, in whole or in part, the risk assessment must be made for the group as a whole by the instructor responsible for the course.
- 3.3 In order to facilitate the risk assessment, the appropriate university [travel risk assessment form](#) must be completed. The online travel risk assessment form has a number of click through boxes and is not designed to be an onerous process.
- 3.4 The form is designed to provide the university with sufficient information to be assured that proper consideration has been given to any foreseeable risks that may be encountered during the trip and that reasonable precautions or mitigations have been agreed to minimise the likelihood of, or impact from, any risk identified.
- 3.5 If the assessment identifies that the travel plans present minimal risk, then the traveller is free to seek financial authorisation to make their booking.
- 3.6 For an individual traveller, if the assessment identifies that there is a higher level of risk present in the proposed travel plan, the risk assessment must be escalated to the staff traveller's line manager or in the case of a student, the department head responsible for the programme or course for which the travel is to be undertaken, for further consideration and approval before any travel or accommodation is procured. The line manager/department head must consider whether there are any adjustments that can be made to the plans to reduce the level of risk. If the risk assessment identifies an unacceptable level of risk which cannot be adjusted to an acceptable level through reasonable mitigations, the travel plans must be cancelled.

- 3.7 For group travel, if the assessment identifies that there is a higher level of risk present in the proposed travel plan, the risk assessment must be escalated to the appropriate Head of Department, Executive Dean or Director of Professional Service.
- 3.8 In all cases, travellers or those responsible for travelling groups must keep their risk assessments under review at all times both before and during travel and must escalate any changes which increase the threat level in the risk assessment to their authoriser for approval. If the level of risk increases whilst the traveller(s) is travelling and the risk assessment cannot be reduced by the introduction of reasonable mitigations, the trip must be cancelled, and the traveller(s) must return home.
- 3.9 In all cases, travellers or those responsible for travelling groups must keep a member of their home department or the office which is sponsoring the travel informed of itineraries (including any changes) before and whilst they are travelling. This will help the university in managing any incidents which occur during the period of travel and will facilitate the provision of support to travellers.
- 3.10 In order to complete the risk assessment, travellers and managers (or supervisors) should consult the following guidance notes:
- [Procedure and guidance for the management of fieldwork activities](#)
  - [Controversial and dangerous research guidance](#)
  - [Guidance Note – Travelling abroad on University Business](#)

#### **4. Authorisation & Responsibilities**

- 4.1 Before any travel is authorised, the authoriser must consider whether
- The travel is necessary or whether the stated purpose might be achieved in another way
  - The proposed travel is wholly and exclusively for the purposes of university business
  - The trip represents good value for money
  - The carbon cost is justified
- 4.2 Line managers and supervisors are responsible for ensuring that travellers are suitably prepared and equipped to travel on behalf of the university or for the purposes of their studies. They are also responsible for ensuring that the purpose of the travel is legitimate for the business of the university or the requirements of study. In the case of staff travellers and any travel which is financially supported by the university, this should be made clear on the documentation accompanying the request for financial approval.
- 4.3 The approver must be an individual in a position of seniority within the academic department, faculty or professional service function and would normally be the line manager of a staff traveller/academic supervisor or department head for a PGR/MRes traveller; for a taught student, the approver must be someone who performs a supervisory role for the student or has some direct authority over the programme on which the student traveller is traveling.
- 4.4 Authorisation must take into consideration the requirement to travel, the safety of the traveller and whether conditions laid down for procurement of travel have been met.
- 4.5 Every instance of travel which is paid for by the university must have appropriate financial approval. Authorisation must take place prior to the booking of travel.
- 4.6 Where travel costs are to be reimbursed by external funders, including research grants and contracts, all such travel costs must comply both with King's regulations and any funder

specific requirements. It is the grant or project holder's responsibility to ensure that this is the case.

- 4.7 Staff should note that there can be financial and legal implications for both individual staff members and King's when working overseas, such as social security and tax obligations. Therefore, if staff members plan to spend more than 60 days working in an overseas country within a 12-month rolling period, they must seek advice from the relevant HR People Partner before travelling overseas. A [Global Staff Mobility Policy](#) and application process for working in any overseas country for more than 60 days was published in November 2022.

## **5. Health and safety considerations**

- 5.1 It is an absolute imperative for the university to take all possible steps to ensure the personal safety and security of its staff and students wherever they work or study. The risks to be taken into account by its travellers are diverse in nature and may be present in either the UK or international destinations. These are risks which are linked to criminal activity, terrorism, political or civil disorder, war situations, as well as risks to health or risks from natural events.
- 5.2 Before travel, serious consideration should be given to the health and safety of all travellers in the context of the local conditions that they are likely to encounter. The risk assessment is a key component of this process and must be used.
- 5.3 In agreeing to the risk assessment, the line manager should be cognizant to the level of risk and viability of the mitigations proposed before signing off the risk assessment on behalf of the university.
- 5.4 Medical advice should be sought from Occupational Health and travel health clinics about necessary vaccinations, immunisation, first aid requirements and health precautions for individual countries. Travellers must also make themselves aware of any ongoing pandemic or other outbreak in the region to which they are travelling and any special requirements that result. For information about travelling with existing health conditions travellers should seek advice from their GP, including medication legality and availability in the country to be visited.
- 5.5 Information should also be obtained by any individual preparing to travel abroad on:
- climatic extremes;
  - cultural information; and
  - safety standards in less well-regulated environments.

## **6. Travel insurance**

- 6.1 Travellers should ensure that their travel is appropriately covered by the university insurance policy when travelling on behalf of the university or in pursuance of their studies. The conditions for cover can be found at the [travel insurance](#) page on the website. Where travel is to a sanctioned country, high risk areas or to an area which the Foreign and Commonwealth Office (FCO) has advised against all-but-essential travel, the traveller/travel sponsor must obtain [advice from the university's insurance team](#) prior to seeking authorisation
- 6.2 Staff must complete a brief on-line [staff travel insurance form](#) for each overseas trip in order to be able to access the Certificate of Insurance.
- 6.3 Students are required to complete and sign a [student insurance application form](#) and obtain the approval of their head of department. Students who are travelling as part of a Global Mobility Office exchange scheme do not need to apply, as they are automatically enrolled in the insurance programme. However, students in the Global Mobility Office exchange scheme

who choose to travel against advice from King's and/or the FCO, will not be covered by the university's insurance, in accordance with 6.6., below.

- 6.4 The Insurance team in the Finance Directorate must be contacted in advance of the travel being undertaken if the proposed period overseas is to exceed 12 months. This is to allow time to consult with the university's insurers. Cover will only be provided in this instance if the details of the travel have been provided to the insurer and they have agreed cover prior to the commencement of the trip.
- 6.5 The university's insurance cover will not apply to any period of private holiday connected with the work or study trip.
- 6.6 Travel insurance only applies for travel to countries where the Foreign and Commonwealth Office (FCO) has not advised against all-but-essential travel.

## **7. Traveller and manager obligations**

- 7.1 All travellers must behave responsibly and with regard for local laws and customs when travelling on behalf of the university. In this respect, all travellers must take full responsibility for their own actions and behaviour. Travellers have an obligation to keep the university informed of their up-to-date travel plans throughout the period of their travel.
- 7.2 Managers and supervisors have a responsibility for ensuring that travellers have the information they need to be able to behave responsibly and make appropriate decisions regarding their safety and security whilst travelling and to maintain the good reputation of the university.
- 7.3 Travellers must ensure that they have obtained the appropriate travel documents, including an up-to-date passport and any visas required.
- 7.4 In order to understand the obligations placed on both travellers and managers (or supervisors), all parties must familiarise themselves with the key guidance tools provided through the university relating to travel:
  - [Travel Hub](#)
  - [The university's travel insurer, and third-party travel security and emergency assistance provider](#)
  - [Procedure and guidance for the management of fieldwork activities](#)
  - [Controversial and dangerous research guidance](#)
  - [Guidance Note – Travelling Abroad on University Business](#)

## **8. Procurement and travel arrangements**

- 8.1 All travel must be authorised by the university budget holder who is responsible for making the funds available. Where the university budget holder is the traveller, the expenditure should be authorised in line with the usual scheme of financial delegations.

### ***Class of travel***

- 8.2 As a charitable institution, university policy is that first class, business or any premium fare in any type of travel will only be permitted under exceptional conditions. These conditions include:
  - Medical reasons, supported by appropriate documentation;
  - Value for money taking into account opportunity costs;
  - The genuine need to travel at short notice with limited fare options;
  - The requirements for a defined class of travel specified by the sponsor of the trip (this should be supported by appropriate documentation);

- The need to work immediately after completing a long-haul flight;
  - The requirement for flexibility in travel which is unavailable in an economy class ticket.
- 8.3 Permission to travel in an upgraded class must be expressly given in writing in advance by the appropriate Senior Officer. For the Senior Vice-Principals, Vice Principals and the College Secretary approval must be given by the Principal or designate. For Executive Deans of Faculty and Directors of Professional Services approval must be given by the relevant Senior Vice-President/Provost. Relevant Executive Deans and Directors of Professional Services will approve all others.
- 8.4 In the case of the Principal this should be covered by annual standing authorisation from the Chair of College Council, indicating that such travel can be permitted where circumstances dictate that this is an appropriate option in the interests of the university.
- 8.5 A copy of such permission should always be attached to purchase orders, expense claims or purchasing card documentation.
- 8.6 In recognition of the carbon impact of travel, travellers are encouraged to think carefully about the option to travel in a higher class.

***Travel providers***

- 8.7 The university approved travel providers should always be used, irrespective of the mode of transport chosen. Details of the university's approved travel providers can be found on the web pages of [Procurement Strategy and Services](#).
- 8.8 Wherever possible, travellers should use the online booking systems of the [approved travel providers](#) in order to minimise service charges. For complicated travel arrangements, users may telephone the travel provider, but additional service charges are likely to be levied for the full travel agency service.
- 8.9 In addition to any other travel options available for the journey to be undertaken, the travel provider must always be asked to quote the most cost-effective and sustainable fare. In this instance, cost-effective means the whole cost of travel (including opportunity costs of lost time) and taking all relevant considerations into account. It does not necessarily mean the cheapest fare.
- 8.10 In some instances, a more environmentally sustainable travel option may be available but may cost more than a less sustainable option. Travellers are permitted to choose the more expensive option on sustainability grounds but must make a note of the reasons for choosing the more expensive travel option on their PO, expenses claim or purchasing card documentation. Help with decision-making around sustainable travel options is available through the [Sustainability](#) web page.
- 8.11 Preferred suppliers provide value for money to the university in a number of ways and travel can be booked through them on any low cost carrier. They have a dedicated team to look after King's travellers and provide legal compliance on our obligations to comply with procurement rules and other legislations as well as annual reports for tax and insurance purposes. In addition, they provided special services to travellers such as:
- A dedicated booking portal with negotiated deals
  - Corporate rate hotel programme (London)
  - Free online booking promotions
  - Free 24 hour emergency phone line service
  - A staffed visa service
  - Free traveller tracking and alerts

- thetrainline.com partnership means we only pay £1 per booking
- Green options when booking online

Given the advantages to the university, the charges of the preferred suppliers may be slightly higher than other providers. If a traveller can demonstrate to the Chief Procurement Officer or designate that an alternative offer provides value for money and covers all of the advantages listed above, they may be permitted to buy their travel outside the preferred supplier agreements.

- 8.12 All transactions relating to travel purchases (other than local domestic travel) must be made using the university's Purchase to Pay system. Travel arrangements made with approved travel providers should not normally be paid for by an individual and subsequently reclaimed via the university's expenses system.
- 8.13 Where itinerary changes become necessary, the most convenient facility with the required necessary service should be used. Unused or partially used tickets should be returned for an appropriate refund

***Accompanied staff travel***

- 8.14 Apart from the exceptions laid out in the [Travel Policies](#), the costs of accompanying partner or family travel will not usually be met by the university. Personal or family travel must not be arranged using the university procurement systems.
- 8.15 Where appropriate permission for partner or family travel has been made, a copy of the documented permission must be attached to the purchase order or the expense claim.

***Travel by road***

- 8.16 Travel by car should only be undertaken after due consideration of the environmental impact, especially when public transport options are available.
- 8.17 It is essential that any vehicle used for university travel meets government safety standards and is appropriately licensed and insured.
- 8.18 Private vehicles should only be used when they provide the most economical or practical method of completing a journey. When considering driving on university business or for study purposes, staff and students should familiarise themselves with the King's College London *Arrangements in Respect of Safe Driving at Work*. These arrangements can be found at:
- <http://internal.kcl.ac.uk/about/ps/safety/sm/procedures/spr030.pdf>
- 8.19 Where a private vehicle is used claims may be made for mileage at the standard university mileage rates, approved by HRMC, which can be found at:
- <https://internal.kcl.ac.uk/about/ps/finance/staff/mileage>
- 8.20 It should be noted that the university's insurance policy does not cover the use of private vehicles for university business as the mileage reimbursement rates already include an element for insurance. It is, therefore, the responsibility of the vehicle owner to ensure that the cover under their personal motor policy extends to the appropriate business use, e.g. the carriage of passengers and/or goods.
- 8.21 If required, such insurance must be arranged by the individual at their own expense. The vehicle owner must also ensure that the receipt of mileage allowance for business use does not invalidate their insurance.
- 8.22 Should a traveller elect to use their own private vehicle in preference to a more economical means of transport, reimbursement will only be made based on the cheaper alternative and not for mileage.

- 8.23 King's College London will not accept any liability for incidents arising from the use of a private vehicle for university business.
- 8.24 A hired vehicle may be used for road journeys where this proves to be the most cost-effective mode of travel. A number of agreements for vehicle hire have been negotiated for use by the HE sector. These provide for a variety of vehicles from small cars to MPVs and vans. Details are available on the [Purchasing Services web pages](#).
- 8.25 Staff may claim reimbursement for the cost of taxi/private hire vehicle fares (of a standard nature) through the expenses system when undertaking university business and when it would not be reasonable to make the journey by public transport. Travel between campuses should be undertaken by public transport unless it is impractical.
- 8.26 In all cases when a taxi journey is being reclaimed, receipts must be provided together with a clear statement of where the journey began and ended, the purpose of the journey and the cost.
- 8.27 Departments must not open accounts with taxi companies without the written authority of the Vice-President (Finance) or their designate.

#### ***Travel by air***

- 8.28 Travellers may not specify a particular carrier solely to gain 'Air Miles' or any other loyalty points. Where Air Miles or loyalty points do not accrue to the university, but to an individual as a result of business travel on behalf of the university, these are expected to be used for future business travel.
- 8.29 Where travel is funded by grants from the United States Government Departments, grant conditions may require that airline travel should be undertaken using U.S. Flag Carriers. Staff should bear this requirement in mind when arranging airline travel, the cost of which is reimbursed by the US Government Department through the respective grant award to the university.

#### ***In-country Travel***

- 8.30 Travellers should take care when booking in-country travel abroad. It is highly recommended that hire cars or excursions be booked prior to travel. It is recommended that where a private vehicle is a necessity, advice is sought from local university colleagues or contacts on hiring a car and driver with a good safety record.

#### ***Accommodation***

- 8.31 The normal expectation is that travellers will stay in the equivalent of a standard UK business hotel. When a higher grade of accommodation is required formal approval must be provided in advance by the appropriate senior officer.
- 8.32 In the case of the Principal, approval for upgraded accommodation should be covered by an annual standing authorisation from the Chair of College Council, indicating that such accommodation can be used where circumstances dictate that the chosen option is in the interests of the university. For the Senior Vice-Presidents, Vice-Principals and the College Secretary approval should be given by the Principal (or designate). For Executive Deans of Faculty and Directors of Professional Services approval should be given by the relevant Senior Vice-President. The relevant Executive Dean and or Director of Professional Service will approve all others.
- 8.33 Accommodation must always be comfortable and safe. The university does not consider that privately rented accommodation through brokers, such as Air BnB, provides a sufficiently secure service and will not reimburse accommodation costs where these providers are used.

The rental of Serviced Apartments through an accredited provider is permitted. If Serviced Apartments or Bed and Breakfast establishments are to be used, they must be registered with an appropriate industry body or regulator.

- 8.34 Travellers may not specify a particular hotel solely to gain loyalty points. Where loyalty points do not accrue to the university, but to an individual as a result of hotel accommodation on behalf of the university, these are expected to be used for future business travel.
- 8.35 Where possible, travellers should utilise the agreements and rates which the university has negotiated. These can be accessed through the web pages of [Purchasing Services](#). Hotels should be booked well in advance to take advantage of discounted rates. Overseas accommodation should be booked through King's authorised travel supplier as part of the traveller's itinerary. Where travellers are attending a conference, they will be entitled to stay at the conference hotel.
- 8.36 Staff travelling to an established partner university are encouraged to contact that university's international office to determine the usual range of hotels for accommodation of visitors.
- 8.37 Accommodation and subsistence reimbursement will be made in line with [Financial Procedures](#). Where meals are not taken in the hotel where the traveller is staying, separate restaurant receipts must be submitted to support a reimbursement claim.
- 8.38 Where hospitality and overnight accommodation is given to a member of staff by a third party, staff may not claim subsistence.
- 8.39 For visitors (including visiting lecturers or external examiners) the university has a number of guest rooms situated throughout its halls of residence. These options should be explored before booking external accommodation. Further details of these facilities can be obtained through [King's Venues](#).
- 8.40 When it is necessary for a member of university staff to stay overnight in London at the university's expense, due to late evening work commitments, this must be approved in advance by the person's line manager. Subject to availability, a university hall of residence should be used on such occasions.
- 8.41 When travelling as part of a delegation, all members of a delegation should stay in the same hotel if at all possible.
- 8.42 It is understood that some travellers will choose to stay with friends or family while on university business. In this instance, they should still ensure they notify their manager or supervisor as part of the risk assessment process, including any additional contact information. The university will not make any payments in lieu of expenses in these circumstances.

***Funder requirements***

- 8.43 Where a funder has more restrictive or additional requirements to those set out above, these must be respected when booking and carrying out the travel, accommodation and subsistence. Relevant documentation to evidence this should be available.

**9. Dealing with incidents whilst travelling**

- 9.1 If a serious incident occurs whilst travelling, travellers must contact the university and may also need to contact the university's insurers and/or the local police. Follow the advice of the local host with respect to the latter where possible.
- 9.2 The King's College London escalation protocol should be used in the event of a serious incident whilst travelling away from campus so that the incident can be managed at the

correct level. Serious incidents include, but are not restricted to, extortion, kidnap, arrest or detention, international terrorist attack, natural disaster, mass transit accident, riots, civil unrest.

- 9.3 Support to help travellers deal with serious incidents whilst travelling away from campus will be managed as part of the university's incident response procedure or will be escalated to the critical incident team, however, in most cases, the incident response will be managed by local emergency services and personal assistance will be provided by King's Insurance representatives.
- 9.4 Travellers must ensure they have registered with the [third-party travel security and emergency assistance travel app](#) for advice and support whilst away from campus. This should not be considered to be a failsafe process and other methods of ensuring that travellers stay in contact with their home department in the university must be put in place by all travellers. The specific mechanisms for this will differ from situation to situation.
- 9.5 Use the App if you need additional medical or security support and follow their advice. If you are not able to use the App, contact Kings Service Centre on **0207 836 5454** to report the issue, confirm your status and any support you are currently receiving and any additional support you may need.
- 9.6 If you are travelling as part of a placement or study abroad contact the arranging office directly during office hours or via the Kings Service Centre out of hours.
- 9.7 Details for contacting the insurance company will be found on the traveller's insurance certificate.

## **10. Further information**

10.1 Further information resources can be found at:

- [General King's College London Travel Safety Advice](#)
- [FCO Travel Advice](#)
- [NHS Travel Health Advice](#)
- [National Travel Health Network and Centre](#)
- [King's Sharepoint Travel Health site for staff](#)