

**Travel Policy**

This policy has been developed to provide broad guidelines for travel whilst on company business. No employee should be placed at a financial disadvantage as a result of travelling whilst performing their work for **EXAMPLE COMPANY**. Equally there should be no financial gain from travelling for work purposes.

The key principles are: -

* The most cost-effective solutions must be sought wherever possible with public transport, hotels and restaurants etc.
* All travel on behalf of **EXAMPLE COMPANY** must be authorised by your line manager in advance of the travel period.
* All expenses should be supported by receipts and claimed using the expenses claim form.
* When travelling, the company expects to cover an evening meal when you are working away for the evening. If you normally purchase lunch at your normal place of work, then we expect that you would continue to purchase your lunch when you are away travelling.

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| --- | --- | --- |
| **Section** | **Detail** | **Page** |
| **1** | **General Guidelines** | **2** |
| **2** | **Travel Administration** | **2** |
| **3** | **Key Travel Policy Guidelines by category, (Air/Rail/Hotel/Car)** | **3** |
| **4** | **General Travel Policy Guidelines by category** | **4** |
| **5** | **Travel Agency Contact Details** | **5** |
| **6** | **Travel Booking Process** | **5** |
| **7** | **Travel Booking Form Process** | **6** |
| **8** | **Personal Travel Profile Form** | **7** |



# General Guidelines

* 1. Employees are expected to apply good judgement, regarding the need to travel, the method, the timing of each trip with minimum impact on the business and the total cost. Wherever possible, the need to travel must be based on a clear benefit to the company. The use of video or audio-conferencing facilities should always be considered.

If travel is required to carry out company business effectively, it should be based on incurring the least expense to the company whilst ensuring the safety, comfort, and convenience of the traveller.

Any travel expenses incurred that do not fit within these guidelines will not be reimbursed.

* 1. The cost of travel can be significantly more expensive if the time between booking and the actual date of travel is short. In particular, any travel plans booked or changed less than 10 working days prior to the actual time of travel are likely incur a significant increase in costs.

Change to existing travel plans, especially at short notice, can also add significant cost. It is the expectation of the company that the traveller plans any travel in detail and sufficiently in advance to avoid exposure to such costs.

All travel expenses will be tracked and reported monthly. The purpose of these monthly reports is to ensure compliance with the travel policy and assist with cost controls.

# Travel Administration

* 1. The company has engaged the services of a 3rd party travel agency, MVBT to manage all our travel requirements. The details of the travel agency can be found in **schedule 1.** The agency has a copy of the **EXAMPLE COMPANY** travel policy and will administer travel requests in line with this policy.

The traveller must make their own travel arrangements directly with the agency. The traveller should specify their preferred date and time of travel but may not instruct the booking of a specific carrier. The travel Agent will seek the best options and provide them to the traveller.

## The travel booking procedure and contact details can be found in schedule 2.

When the booking has been approved, the agency will incur the cost of the booking on behalf of the traveller for all major expenses, (flights, train tickets, hotel room, car rental etc.).

The traveller will typically cover the cost of transactional expenses (meals, taxis, public transport etc.). For all transactional expenses, the traveller must complete a travel expense claims form for approval and reimbursement.

Where a traveller wishes to proceed with travel arrangements that are not consistent with this policy, the agency will ask for additional approval in order to proceed with a booking (or a change to an existing booking). The additional cost may be paid for by the traveller.

* 1. The agency will provide a real time status of bookings to key members of the management team.



# Guidelines by Category

|  |  |  |
| --- | --- | --- |
| **Category** | **Policy Guideline** | **Ticket Type** |
| **AIR TRAVEL** | | |
| Airline Preference | Cheapest available  (Agency will focus on low cost airlines) | Fixed  (not flexible without Exec approval) |
| Europe | Cheapest available  (Agency will focus on low cost airlines) | Fixed  (not flexible without Exec approval) |
| North America (domestic) | Cheapest available  (Agency will focus on low cost airlines) | Fixed  (not flexible without Exec approval) |
| Long Haul  Flight time 5 to 9 hours | Premium Economy (or equivalent) | Fixed  (not flexible without Exec approval) |
| Long Haul  Flight time over 9 hours | Business Class (or equivalent) | Fixed  (not flexible without Exec approval) |
| **RAIL TRAVEL** | | |
| Eurostar | Standard class | Must be booked via the agency |
| In excess of £100 | Standard class | Must be booked via the agency |
| All other rail travel | Standard class | Traveller to expense then be  reimbursed |
| **HOTEL** | | |
| Local  (near EXAMPLE COMPANY  offices) | Standard room | Company approved hotel booked via the agency |
| UK | Standard room - £150 p/n limit | Must be booked via the agency |
| Europe | Standard room - 180 EUR p/n limit | Must be booked via the agency |
| USA – major city | Standard room - $300 p/n limit | Must be booked via the agency |
| USA – regional city | Standard room - $200 p/n limit | Must be booked via the agency |
| Note: Please advise the agency if there is a client rate or better deal available | | |
| **RENTAL / HIRE CAR** |  |  |
| All locations | Standard (VW Golf equivalent) CDW insurance must be selected  Vehicle should be filled up prior to return  Fees/penalties incurred by the traveller are the traveller’s responsibility. | Must be booked via the agency |



1. **General Travel Guidelines**

|  |  |  |
| --- | --- | --- |
| **Category** | **Policy Guideline** | **Ticket Type** |
| Rewards Programmes | Must not influence the booking choice |  |
| Internet access | £10 (or equivalent) per day limit | Must retain a receipt |
| Phone – Mobile | Data Roaming should be switched off when travelling to avoid incurring significant charges.  Where possible avoid making international calls unless the contract permits this at an acceptable rate. Only use Wi-Fi connectivity for data / emails  Personal phone calls must be limited in time and frequency. You may be requested to cover this cost. Please consider alternative arrangements such as Skype’s phone call facilities  to landlines, which are very cost effective. Business calls may be expensed. |  |
| Phone – Landline | Try to use the office conferencing facility with a local dial in number. Avoid hotel phones Personal calls: refer above. |  |
| Medical | Check the insurance terms |  |
| Meals | When travelling, the company expects to cover for example an evening meal when you’re working away for the evening. If you normally purchase lunch at your normal place of work,  then we expect that you would continue to purchase your lunch when you are away travelling. | Must retain a receipt |
| Visa’s | To be paid for at cost by the company if required as part of the business trip | Must retain a receipt |
| Passport | The traveller’s passport must have a minimum of 90 days  remaining prior to renewal. |  |
| Expenses | Presentation via claims form with receipts |  |
| Taxis | Licensed taxis or taxis with a company account. Establish rate prior to using the service. Use only when public transport is not available or unsafe. May be used when with clients or multiple EXAMPLE COMPANY employees, but with SLT approval. Use when required to travel outside of business hours when excessively late/early and with SLT approval. | Must retain a receipt and record within your own expenses for record purposes. |
| Public Transport (Bus/Tube  etc.) | Always use the most cost-effective option | Must retain a receipt of cost |
| Company car | Standard mileage rates apply | See schedule 4A |
| Personal car | Standard mileage rates apply | See schedule 4B |
| Personal car | Parking fees / tolls | Cheapest available |
| Insurance – Business Travel  Property | Wear and tear/repairs to luggage are the responsibility of  the traveller. However, refer to the policy on the Intranet |  |
| Insurance – Business Travel | Details may be obtained from the Intranet/Office  Administration |  |
| Out of hours travel changes | Please see agency 24/7 contact |  |
| Personal travel – as part of  business trip | Private travel must not conflict with or influence business  travel arrangements |  |
| Entertainment | Entertaining clients must be agreed with your line manager. Client/guest entertainment: Each guest must be named, and the purpose of the expense made clear on the expenses claim form.  Only the senior person in the group must claim the expenses for the event. |  |
| Exchange Rates | Published tourist rates at the time of the travel or the actual rate of exchange |  |
| Company Credit Cards | Credit card use must be pre-authorised by your line manager and an SLT member as set out by Finance. Amounts over  £500.00 must be pre-authorised by an Exec member. The  ‘spend’ must be reported monthly by spreadsheet. Receipts and justification must be supplied. |  |
| General guide: | If in doubt, always seek pre-authorisation prior to spending company money. Inappropriate use of company funds, may lead to disciplinary action being taken and may result in the  termination of employment. |  |



1. **Travel Agency Contact Details**

Below we have listed the direct contact details for the agency and the out of hours contact details to be used in cases of emergency or when in different time zones to the UK.

**The agency: Meon Valley Business Travel (MVBT)** [www.meonvalleytravel.com](http://www.meonvalleytravel.com/)

* The following people should be your first line of contact when making travel arrangements Contact

[contact@meonvalleytravel.co.uk](mailto:contact@meonvalleytravel.co.uk)

* **From UK +44 (0) 844 736 3663 / From outside UK and Mobile +44 (0)116 264 5270**

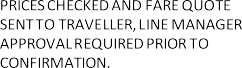
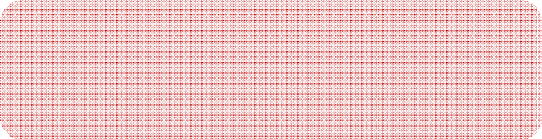
Office Hours: 09:00 to 17:30 (UK time)

* MVBT 24hr Emergency Service: **+44 (0)1730 820 971**

*(It is advisable that you enter the following telephone number into your mobile phone)*

## Travel Booking Process

The diagram below is a sketch outline of the process flow for completing a booking. Forward planning and adherence to the travel policy will speed the time taken to complete the booking





# Travel Request Form

All fields must be completed and returned to the travel planner **10 days prior to the departure date** with management approval.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Applicant Information** | | | | |
| Traveller name (as shown on the passport) | |  | | |
| Department | |  | | |
| Date | |  | | |
| **Travel Information** | | | | |
| Departing From | |  | | |
| Going To | |  | | |
| Departure date | |  | | |
| Return date | |  | | |
| Mode of transport | | Flight Train Other (Please specify) | | |
| Travel Operator | |  | | |
| Outbound departure time | |  | | |
| Inbound departure time | |  | | |
| Total Cost | |  | | |
| Frequent traveller programme name(s) and number(s) | |  | | |
| Passport number and country of issue | |  | | |
| Passport Expiry date | |  | | |
| DOB | |  | | |
| **If this is a multi-trip or a different travel operator is used for your return journey, please complete the fields below** | | | | |
| Mode of transport | | Flight Train Other (Please specify) | | |
| Travel Operator | |  | | |
| Outbound departure time | |  | | |
| Inbound departure time | |  | | |
| Total Cost | |  | | |
| Frequent traveller programme name(s) and number(s) | |  | | |
| **Accommodation Information** | | | **Car Hire Requirements** | |
| Hotel name |  | | Car hire required | Yes No |
| Number of nights |  | | Car hire provider |  |
| Total |  | | Total |  |
| **Reason for travel** | | | | |
|  | | | | |
| **If travel request is received less than 10 days before departure date, please state why** | | | | |
|  | | | | |

**Please note that all requests must be in line with our present company policy guidelines.**

**Grand Total**

|  |  |
| --- | --- |
| **Line Manager Approval\*** | **Executive Approval\*** |
| **Name Date Sign** | **Name Date Sign** |

**\*Email approval from your line manager or a member of the Executive team will be accepted**



# Personal Travel Profile

The form below is optional but may be completed by frequent travellers to assist the booking process. The completed form should be submitted to the agency.

|  |  |
| --- | --- |
| **CONFIDENTIAL PERSONAL TRAVEL PROFILE (OPTIONAL)** | |
| **INFORMATION** | **DETAILS** |
| **Last Name (as on passport)** |  |
| **First Name** |  |
| **Middle Name** |  |
| **Title (Mr / Mrs / Miss etc.)** |  |
| **Position / Job Title** |  |
| **Home Address** |  |
| **Emergency Contact (Name)** |  |
| **Emergency Contact (Phone No)** |  |
| **Company Name** |  |
| **Company Address** |  |
| **Phone (Direct Line)** |  |
| **Phone (General Office)** |  |
| **Phone (Mobile)** |  |
| **Email address** |  |
| **Air Travel preferences** | |
| **Airline memberships / numbers** |  |
| **Car Rental memberships/numbers** |  |
| **Hotel chain memberships/ numbers** |  |
| **Dietary requirements** |  |
| **Seating preference** |  |
| **Other (please specify)** |  |
| **Passport / Other travel ID** | |
| **Passport / Other ID number** |  |
| **Place of issue** |  |
| **Date of Birth** |  |
| **Expiry date** |  |
| **Date of issue** |  |
| **Full name on passport** |  |

## Data Protection: Where does my personal information go?

We use a standard traveller profile form to obtain specific information from corporate travellers. It is at the travellers’ discretion as to how much information they provide. On receipt of the completed form the information is securely uploaded electronically into the reservations Global Distribution System, Travelport Galileo. The traveller profile is then linked to their employer’s company profile. It is then the responsibility of the traveller to notify MVBT of any amendments. Any credit card information provided is encrypted within the system. Information collected is to ensure we have t h e correct data for the following:

* To provide airlines with APIS information
* Membership numbers for hotels and airlines
* Emergency contact details
* Seat preferences
* Special requests
* Dietary requirements

Only our own staff and our out of hour’s team based at our head office have access to this information when making or amending a reservation.

All our staff sign a confidentiality agreement upon commencing employment with our company. We ensure all data is collected in a fair and lawful manner and only use this data for specified purposes within the Data Protection Act 1998 (DPA). The information collected is for sole use and will not be shared with any third parties for marketing purposes. In accordance with the DPA we will supply upon request copies of personal data held about an individual. We have taken appropriate technical and organisational measures against unauthorised and unlawful processing, accidental loss, destruction or damage to personal data.

In the event that we change the Travel agency in the future, MVBT have confirmed that they delete all personal information