

RICS Travel/Expenses Policy



RICS

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TRAVEL/EXPENSES POLICY

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1. INTRODUCTION

This document establishes policies governing the expenditure incurred by RICS members and staff while carrying out RICS business. While recognising and acknowledging the time, good will and commitment of members and staff involved in RICS activities, travel and related expenses form a substantial part of RICS' total expenditure and it is essential that RICS manages these costs effectively.

All RICS members and staff should familiarise themselves with this policy and ensure that it is adhered to. For aspects of the policy that may vary over time the current parameters are documented in Annex A which will be updated and reissued as necessary.

2. SCOPE

This policy applies to all RICS members and RICS staff. It also extends to sub-contractors and other such personnel carrying out RICS business.

3. POLICY STATEMENT

RICS seeks to reimburse all members and staff equitably for expenses incurred on RICS business whilst aiming to be a 'responsible business' through reducing the overall amount of travel and promoting the use of sustainable transport methods.

4. RESPONSIBILITIES AND ENFORCEMENT

All RICS members and staff are responsible for complying with the guidelines laid out in this policy. RICS managers are responsible for ensuring compliance to the policy. **Any expense claims that do not conform to the policy will not be paid or reimbursed by RICS and will be the responsibility of the RICS member or staff.**

If staff have any queries, they can be directed to your line manager. For members, queries can be addressed by the 'responsible person' which is the staff member who co-ordinates the board or meeting.

Where agreement cannot be reached, there is an escalation process in place.

This Policy is issued by the Finance Committee in conjunction with the RICS Operations Board. Any comments or queries should be directed in the first instance to the Finance Director.

5. WORLDWIDE PRINCIPLES

It is recognised that due to different operational requirements across our worldwide locations, travel arrangements will be made in different ways, however every effort should be taken to ensure arrangements comply with the following principles:

- At all times, considerations of the health and safety of members & staff should be paramount.
- The policy must not conflict with legal requirements.
- Where for whatever reason it is necessary to depart from the policy the responsible member of RICS staff should be informed at the earliest opportunity.
- Due consideration will always be given to ensure that reasonable adjustments are made to travel arrangements where mobility issues affect staff and/or members on RICS business.
- Claims must be based on actual costs incurred.
- Original receipts are required for all items claimed. Exceptions may be made for small value items such as car parks and underground tickets if receipts are not readily available.
- Reimbursement should normally be based on the most economic means of travel available.
- Consideration should be given to the *need* to travel versus other sustainable options (i.e. video/teleconferencing)
- Expense claims should provide sufficient detail to demonstrate that expenses relate solely to RICS business.
- Where travel is for both Institution and non-Institution business, an equitable apportionment of costs will be reimbursed.
- Responsibility for approving expenses rests with the appropriate member of RICS staff. If members or staff are in any doubt as to the application of the policy, approval should be sought before incurring the expense.
- Expense claims should be submitted at the earliest opportunity and in any case not more than three months after incurring the expense.
- Member claims should be made using the approved member expense claim form. These can be obtained through a member of staff or downloaded from the RICS.org website.
- Staff and members are responsible for ensuring they carry all relevant documentation with them on RICS business. Documents should be backed up wherever possible.

6. HEALTH AND SAFETY

RICS takes its responsibilities seriously in relation to its duty of care to take reasonable steps to ensure the safety of its employees and members when travelling abroad. Equally, there is a similar obligation upon those individuals to ensure they too take reasonable steps to ensure their own safety and wellbeing whilst travelling on RICS business.

RICS has a Personal Accident and Travel Insurance Policy which covers staff and members whilst travelling outside of their normal country of residence on RICS business only. Our policy is with AIG and the policy number is: 0010525800. If you require further information on our Travel Insurance, please contact Zena Southwell on (0044) 0207 695 1543. **We would recommend you carry these details with you when travelling.**

Before travelling outside of your normal country of residence RICS requires you to undertake investigation in relation to both safety and health requirements. Our Personal Accident and Travel insurance providers offer a service to travellers from their website: www.aigassist.co.uk and by using our policy number (10525800) to log into the website travellers can get up to date country specific information. If immunisations are recommended, please check and arrange these through your own GP, and before travelling confirm in writing/email to the responsible person (Defined in section 4) that these have taken place.

More advice and information on travelling overseas is available by visiting www.fco.gov.uk. Any concern in respect of individual safety should be raised with the 'responsible person' before travelling. **RICS will not expect or support individuals to travel to areas where there is known to be uncertainty over personal safety.**

Members and staff who are **British Nationals** travelling and living overseas are also advised to register with LOCATE. LOCATE is a service provided by the Foreign Office that enables the British embassy and crisis staff to provide assistance in an emergency. The benefits are:

- If a major catastrophe occurs the British Embassy will have an instant record of your details so you can be contacted and given advice
- To enable friends and family to contact you.

To register with LOCATE use the following link:

<http://www.fco.gov.uk/en/travelling-and-living-overseas/Locate/>

7. TRAVEL

UK

RICS has appointed a “travel partner” who will book travel requirements based on the guidelines in this policy. All members and staff based in the UK should use this partner for their travel arrangements – please see Annex A to this policy for details. Details on spending limits can be found in Annex B.

Non UK

Members and staff outside the UK should follow the guidelines in this policy when booking travel. Further advice on spending limits can be sought from the relevant World Regional Office - see Annex C.

8. AIR TRAVEL

RICS members and staff are expected to travel economy class for all flights that are less than 4 hours in duration. An upgrade to premium economy class (where applicable) can be authorised where the flight time exceeds 4 hours (authorisation must be sought before booking). For flight times greater than 7 hours, Business class can be authorised (authorisation must be sought before booking).

RICS members and staff are asked to be flexible where it can significantly affect the cost of the airfare, but RICS also accept that members and staff may be working to tight business schedules. Regard should be given to:

- flight departure or arrival times within two hours before or after the required time if the airfare is significantly lower
- the possibility of an indirect flight if the saving is + £200 with an additional journey time no greater than 2 hours
- using the most economical carrier

Thought should be given to the most sustainable mode of transport, with short internal flights being avoided where possible. Consideration should first be given to using rail and bus. Consideration should also be given to the possibility of virtual attendance.

Unused/Void Tickets

Unused airline tickets, E-Tickets or flight coupons must never be destroyed or discarded as they may have a cash value.

9. HOTEL ACCOMMODATION

All hotel bookings are for room and breakfast ONLY. All extras are to be paid for and, if appropriate, claimed back using the expense claim procedure.

Cancellation

RICS members/staff are responsible for cancelling their reservations either by contacting our Travel Partner or dealing directly with the hotel. In the latter case, you should request and retain a “cancellation reference” as evidence of the cancellation. No-show charges are not reimbursable by RICS.

As a general rule hotels should only be provided when an individual is attending to RICS business at a distance of more than 50 miles from their home address.

10. RAIL/FERRY TRAVEL

RICS members and staff are expected to travel in Standard Class or its equivalent (including Le Shuttle and Eurostar services) and to take advantage of low fare options where possible. Significant savings can be made for travel at off-peak times and members and staff should consider this when determining their time of travel. For train journeys over three hours first class travel may be used. . It is acknowledged that when booking in advance for off-peak travel, a first class ticket can sometimes be purchased for the same or lower price than a standard ticket.

Consideration should always be given to the possibility of virtual attendance.

11. CAR RENTAL

RICS members and staff should refuel hire cars prior to returning them in order to avoid punitive charges levied by the car hire companies.

12. GROUND TRANSPORTATION

For airport transfers the airport shuttle and hotel courtesy coaches are usually the most cost effective services available and should be used where practical.

Public transport should be used where practical. Limited use of taxis will be acceptable based on business need, personal safety, cost or logistics. Taxi sharing is encouraged over sole occupancy use.

Connecting tickets purchased will be reimbursed through expenses in the usual way.

Using your own vehicle

Reimbursement of mileage claims will be made where public transport is not viable or for justifiable reasons e.g. personal safety. Where appropriate and possible, RICS members and staff should give consideration to car sharing. For rates see Appendix A.

Parking

RICS members and staff will be reimbursed for actual parking charges in association with business travel, i.e. station/airport, etc. Long term or Off-Airport parking should be used for journeys expected to exceed one night's stay.

13. HOSPITALITY

RICS members and staff are asked to show financial discipline when providing hospitality to other RICS members, staff or third parties. Claims should state who was present, along with the business reason. Claims considered to be excessive may not be reimbursed.

14. CONFERENCES

RICS may, on occasion, request that RICS members or staff attend business conferences, seminars and exhibitions. All business related expenses incurred will be reimbursed.

15. ADMINISTRATION PROCEDURES

1. Authorisation & Exceptions to Policy

RICS members and staff are expected to abide by the expense policy unless exceptional circumstances dictate otherwise.

RICS may seek reimbursement from individuals who contravene the policy without sufficient reason and/or approval.

It is not permissible under any circumstances for an RICS member or member of staff to authorise their own expenses.

2. **Cancellations & Refunds**

Hotel and car hire “no show charges” will be charged directly to the traveller by the service provider.

[NOTES FOR RICS STAFF]

3. **Budget holder responsibility**

The responsibility for checking and authorising claims rests firmly with Budget Holders. When authorising expense claims Budget Holders have a responsibility to:

- Understand and apply the expenses policy, and
- Fully review each claim for adherence to the expenses policy

If claims contain items outside the scope of the expenses policy, the onus is on the Budget Holder to decide whether to authorise them. If the Budget Holder decides to authorise such items, the claim should be signed by both the Budget Holder and the claimant to acknowledge that these items fall outside the approved policy and, in the UK, will be subject to declaration on a P11D.

4. **Company Credit Cards**

Items of a personal nature must not be purchased using a company credit card. A company credit card must also not be used to purchase items that would normally be bought through the purchase order system.

ANNEX A TO RICS TRAVEL POLICY

ADDITIONAL NOTES FOR MEMBERS AND STAFF BASED IN THE UK

Travel partner and arrangements

RICS staff already book all travel requirements through the travel partner and RICS members based in the UK should now do so.

RICS' Travel Partner is: TMG CORPORATE
 TRAVEL MANAGEMENT GROUP
 WORLDFARER HOUSE
 DORMER PLACE
 LEAMINGTON SPA
 CV32 5AA
 Tel: 01926 458001
 Fax: 01926 881753

The TMG account team responsible for RICS are: Ros Campbell – Account Manager
 Jason Buck – Account Executive
 Alison Stacey – Account Executive

TMG BRIEF

TMG have been tasked with managing this Travel Policy on behalf of RICS. TMG are targeted and measured on providing a full range of travel related services to all employees and members, in accordance with this Policy. This includes offering the most cost effective solution to the traveller's requirements on each and every occasion.

We have a Service Level Agreement in place with TMG. A copy is available on request.

There are many benefits in using a Travel Partner. These include:

- i) Provision of monthly Management Information and reporting
- ii) Information on location of staff and members travelling on business, in the event of a major disaster
- iii) Members can book with the Travel Partner which provides more efficient use of members' time and also eliminates the need to pay for travel up front and then put in a claim.

Our travel partner is responsible for:

- Booking of all air, rail, ferry, hotel, car rental reservations and other travel services
- Provision of management information (MI) to RICS
- Delivery of a level of service which adheres to the SERVICE LEVEL AGREEMENT (a copy is available on request).

Bookings should be made as outlined in this policy, and can be made as follows:

CONTACT

Members and staff can contact TMG via the following routes.
[Members will need to ensure they have the name of the relevant staff member for authorisation purposes].

During normal office hours (UK time)

From 0830 to 1800 WEEKDAYS (+44) 01926 458001

Outside of normal office hours, TMG offer an Emergency Out of Hours Service

From 1800 to 0830 WEEKDAYS (+44) 01708 382106
And All Day SAT/SUN/BANK HOLS
or by email: team@ricstravel.com

In exceptional circumstances travel and accommodation may be booked personally by RICS members or staff and claimed back through expenses. Authorisation should be gained from the relevant staff member or budget holder prior to booking.

If a spouse or partner accompanies an RICS member or staff on a personal basis, this will need to be booked and paid for personally.

1. Air travel

The Travel Partner, in researching the lowest available airfare may offer some options by having regard to:

- flight departure or arrival times within two hours before or after the requested times if the airfare is significantly lower
- the possibility of an indirect flight if the saving is + £200 with an additional journey time no greater than 2 hours
- Using different carriers (members and staff should not specify a preferred carrier).

2. Unused/void tickets

Unused E-tickets must be notified to TMG or the Authorised Travel Booker and any unused tickets or coupons should be returned immediately to the Travel Partner, via the Authorised Travel Booker. Unused tickets must NOT be sent to the airlines direct.

3. Hotel reservations

RICS members and staff are expected to make their hotel reservations through the travel partner for both UK and overseas requirements. En-suite rooms in a standard hotel may be booked when this reflects optimal use of time for the person concerned eg: attending meetings in the same location on consecutive days.

The Travel Partner will book the hotel requirements according to the business location required using RICS rates and room allocations from the RICS hotel programme, or the Travel Partner rates, whichever is the lower. The properties on the RICS hotel programme have been selected against agreed criteria which include room rate, location, and facilities offered.

The RICS hotel programme includes lower cost accommodation such as Travel Inns, Premier Lodges, Holiday Inn Express and similar. In order to minimise expenditure,

consideration should be given in the majority of instances to the use of these properties by any RICS members or staff travelling on business.

All rooms will be guaranteed for late arrival by the Travel Partner.

4. Rail/ferry travel

The RICS travel partner provides a same day delivery service for rail tickets to Surveyor Court (Coventry office) and there is an onsite ticket printer in Great George Street (London office), but staff should order tickets in advance whenever possible.

For members and regional staff, tickets can be posted to your home or office address by 1st class post. For last minute tickets you can order a ticket on departure which can be collected from most major railway stations in the UK.

5. Car rental

The Travel Partner manages the RICS arrangements and all RICS members and staff should make their car hire reservations through the Travel Partner to ensure the best rates are achieved. You will be asked to produce your drivers licence when collecting a hire car.

6. Ground transportation

For use in conjunction with rail travel, connecting tickets will normally be supplied through the Travel Partner.

7. Administration procedures

Booking

All reservations by RICS members should be made direct with the travel partner and the name of the relevant staff member given for authorisation purposes. All reservations for RICS staff should be made via an authorised travel booker.

Traveller profile forms

All staff and members expected to travel at least once per year should submit a completed traveller profile form to the Travel Partner to ensure that all relevant details and preferences are adhered to in the reservation process. The profile form may be found on the intranet site or a copy can be requested from a member of staff or the Travel Partner.

Group and meeting travel (10+ travellers)

The Travel Partner is RICS preferred supplier for group travel or group meeting arrangements. RICS members and staff should contact the Travel Partner to establish their ability to meet the requirements.

8. Authorisation & exceptions to policy

The Travel Partner will monitor all bookings against the policy and warn the booker if the booking contravenes the policy. Bookings in contravention of the policy will be reported to RICS management on a monthly exceptions report.

9. Payment

The Travel Partner is only authorised to accept bookings on account for air, hotels, rail, ferry tickets and ancillary services such as passports and visas. These charges will be invoiced directly to RICS who will settle the account monthly.

All other payments must be settled by the RICS member or staff member, directly with the service provider. RICS will then reimburse appropriate expenses to the traveller through the expenses claim procedures.

10. Cancellations and refunds

All cancellations should be directed to the Travel Partner. In the event that a cancellation is made direct with the service provider e.g. out of office hours, then travellers are required to request and retain a cancellation reference in the event of queries later.

All requests for refunds should be made through the Travel Partner's Travel Desk. All unused and cancelled travel documents should be returned to the Travel Desk in order that the Travel Partner can claim a refund on behalf of RICS. Under no circumstances should tickets be sent direct to suppliers for refund.

In the event that an E-Ticket is not collected, this should be notified to the Travel Desk who can then re-claim the airfare from the airline.

11. Tax arrangements for expenses

Staff

Under existing tax legislation any payments of expenses by an employer should be declared to the Inland Revenue on a P11D. These payments are normally taxable and the onus is on the employee to submit a Section 198 expenses claim to avoid the tax liability. This is clearly an onerous arrangement for both employer and employees, and it is possible to avoid this requirement by obtaining a dispensation from the Inland Revenue. Dispensations are dependent on having an expenses policy, which is approved by the Inland Revenue. The RICS has such a dispensation and it is therefore important that all staff abide by the approved policy. Failure to do so will render individuals liable to tax on expenses that are outside the policy and the RICS is under an obligation to report all such expenses on a P11D.

Members

Members making claims in line with the policy are not specifically covered by the agreed dispensation policy however, as they are being reimbursed for incurred out of pocket expenses there should not be any income tax liability, care should be taken to ensure that the income and costs are appropriately disclosed on any self assessment or company tax returns that the member may be required to complete.

12. Costs arising from breaches of expenses policy [Note for RICS staff]

In addition to the tax liability incurred by the individual, payments outside of the approved policy will attract Class 1 NI, which is payable by the employer. This is a direct cost to the Institution and if incurred will be charged to your budget.

13. Staff expense claims

UK staff claims must be made using the online claim system. No expense claims will be paid through petty cash.

ANNEX B – UK SPENDING LIMITS

Please note that for expense claims that are outside the set criteria a reason will need to be given.

The cost of breakfast and dinner can be reimbursed when travel begins before 07.00 and/or ends after 19.00. Staff/ members are expected to provide their own lunch, however, lunch can be claimed for full day meetings where not otherwise provided.

1. United Kingdom

1.1 Hotel Accommodation

£100 limit for stays outside major cities

£150 limit for stays in major cities

Major cities are:

London

Birmingham

Manchester

Leeds

Newcastle

Glasgow

Edinburgh

Liverpool

1.2 Meals

Breakfast: up to £15

Lunch: up to £20

Dinner: up to £30

1.3 Car Mileage rate

Current mileage allowance is 40p per mile for the first 10,000 miles and 25p per mile thereafter.

ANNEX C – ADDITIONAL NOTES FOR MEMBERS AND STAFF OUTSIDE THE UK

Members and staff based outside the UK should follow the guidelines within this policy when booking travel and accommodation. Further information on spending limits is available from the relevant World Regional Office:

RICS Africa

P O Box 3400, Witkoppen, 2068
62 Turaco Street, Norscot, Fourways, 2196 South Africa
T + 27 11 467 75 45
E ricssouthafrica@rics.org

RICS Americas

60 East 42nd Street
NY 10165 New York USA
T + 1 212 847 7400
F + 1 212 847 7401
E ricsamericas@rics.org

RICS Asia Pacific

Room 1804, Hopewell Centre
Wan Chai, Hong Kong
T + 852 2537 7117
F + 852 2537 2756
E ricsasiapacific@rics.org

RICS Europe

Rue Ducale/Hertogstraat 67
BE - 1000 Brussels
T + 32 2 733 10 19
F + 32 2 742 97 48
E ricseurope@rics.org

RICS India

48 & 49, Centrum Plaza Building
Sector Road, Sector 53 Gurgaon-02, India
T +91(0) 9810822202
E ricsindia@rics.org

Middle East

Office 208, Block 11, Dubai Knowledge Village
PO Box 231078 Dubai, UAE
T + 971 4 375 3075
F + 971 4 427 2498
E ricsmiddleeast@rics.org

RICS Oceania

Suite 2, Level 16
20001 Castlereagh St. Sydney 2000, Australia
T + 61 2 9216 2333
F + 61 2 9232 5591
E ricsoceania@rics.org