



Payment of UCISA expenses to Executive and Group members

Travel/subsistence costs for attendees at scheduled Group and Executive meetings should normally be recovered from the home institution via their standard internal financial procedures.

However, there are four circumstances where individuals are entitled to claim expenses from UCISA:

1. Any person having membership of the Executive and a Group should designate one as their prime UCISA functional role. Travel and subsistence costs associated with attending scheduled meetings under the prime UCISA functional role should be borne by the individual's home institution. However, travel costs for any additional UCISA activities (except attendance at UCISA events) may be reclaimed from UCISA. These costs should have been included in the appropriate Group or Executive Business Plan/Budget.
2. Workshop/event organisation meeting attendees are entitled to claim travel costs from UCISA for attending such meetings. These costs should have been budgeted for in the appropriate event budget.
3. There may be cases of individual institutional hardship, for example attendees from very small institutions or from *remote* institutions, where the costs for a particular individual to attend Group meetings is disproportionately high. Where this is the case, the individual concerned should raise the matter with the appropriate Group Chair. At the discretion of, and on the recommendation of the Group Chair, selected members of a Group can be awarded discretionary payments to defray some of that individuals travel costs to their normal prime UCISA functional meetings where such costs are particularly high. The UCISA Executive or Group budget will take account of such payments, which must be agreed through the Treasurer.
4. Personal *out-of-pocket* expenditure by individual members on entertainment or other items associated with a particular UCISA event can be reclaimed from UCISA and should have been budgeted for within the appropriate Group, Executive or event budget.
5. The expectation is that ordinary Group meetings will be hosted free of charge from within the membership. However, UCISA will reimburse (reasonable) accommodation and dinner costs for each Group's annual planning 2-day meeting.

Payment of UCISA expenses to Group and sub-group members

Members serving on both Group and sub-group committees *may* also be eligible to claim limited expenses by prior agreement:

1. All members are encouraged to claim for Group and subgroup activities from their own institutions.
2. Where this is not possible *and* the Group Chairs feel it necessary, moderate claims (up to £150) will be met.
3. In exceptional cases, *and with prior approval* from the Group Chair *and* Treasurer, larger claims may be entertained to defray part or all of the expense.

Claims procedure

There are two possible methods which can be adopted for making expenses payments from UCISA funds to individuals:

1. An individual can make an internal claim from their institution and then submit an institutional invoice itemising claimed cost details and submitted to UCISA for payment.

2. A personal claim can be submitted to UCISA for settlement on a UCISA claim form which can be obtained from UCISA Operational Support or the website.

Travelling expenses

It is expected that claimants for actual travel under these guidelines will attempt to travel by the cheapest, but most convenient form of travel, but the following guidelines should be observed:

1. Air travel should be Economy class, and where possible using discount airlines or APEX fares. If claiming on a UCISA expense claim form, receipts must be supplied.
2. Rail travel should be second class. The same rules apply for making claims as for Air travel claims ie personal re-imbursments on a single claim form together with proof of purchase. Institutional claims should appear on a separate claim form. If claiming on a UCISA expense claim form, receipts must be supplied.
3. Car hire costs, together with fuel costs may be claimed on production of appropriate receipts.
4. Receipts for taxi and bus journeys must be provided.
5. Private Car travel may be claimed at the rate of 40 pence per mile. However, excessive mileage claims will need to be justified if a substantially cheaper public transport option existed. Receipts for car parking should be obtained and bridge/road tolls itemised. Petrol/fuel costs are deemed to be included in the mileage rate.

Claims for travel/expenses re-imburement will be via an official UCISA expenses claim form, copies of which can be obtained from the website at www.ucisa.ac.uk/resources/docs/ucisa/Claim_Form_2007.pdf, or by an appropriately itemised institutional invoice.

Claim forms should clearly identify the claimant, name and address to which/whom payment should be sent, date and nature of the expense, travel destinations (where appropriate), and itemised claim details. Forms must be signed and dated and sent, with all associated receipts, to the UCISA Business Manager for payment as soon as possible after the expense date. The Business Manager and Executive Secretary will then authorise them. Officer claims will be authorised by another Officer.

Claim forms and associated receipts are an auditable item and, therefore, emailed claims which refer to associated receipts cannot be accepted.