Business Travel Policy Template



Use this handy template to create a corporate travel policy for your business

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# Introduction

This Travel Policy sets out <Company Name’s> guidelines for all employees in relation to booking travel for business purposes. This Travel Policy governs all travel authorised by the <Company Name>, regardless of the nature of business. It applies equally to all employees and non-employees who travel on the company’s behalf. However, departments and authorizers may choose to impose more restrictive standards due to trends, budgets or additional control. These additional restrictions may be notified and imposed at the discretion of management at any time.

This policy is designed to be easy to understand and all employees should familiarise themselves with this policy before making any travel arrangements. If you have any queries or if anything is unclear, please speak to your Line Manager for clarification.

# Booking Travel

<Company Name’s> preferred travel management company is <Insert travel management company>.

Contact Details

<Insert address and contact details of travel management company>

Address:

Phone:

Email:

Website:

<Travel Management Company> will assist in the enforcement of this policy and also provide us with management information so the company can monitor its business travel expenditure. It is a company requirement that all travel arrangements are confirmed with <travel management company> and are made in adherence to this Travel Policy in order that financial benefits are maximised.

<Travel Management Company> provides a 24-hour emergency service. If your travel plans change outside of normal UK office opening hours and urgent assistance is required, you can contact the 24 hour helpline where you will be given any up to date travel advice. This service is available wherever you are in the world, regardless of time of day. Itineraries can be reviewed, altered and new tickets issued if necessary.

# Paying for Travel

Use this section to tell employees how travel is paid for. If you’re using a travel management company, it may all be billed to them or some travellers may have their own corporate cards. We’ve included some examples below.

Delete as appropriate

As part of our agreement with <Travel Management Company>, payment for all business trips will be handled by the travel management company, who invoices <company name> on an agreed basis.

All travellers have their own corporate credit card to which all travel expenses should be charged. All receipts should be retained and submitted as part of the expenses process.

In the event of an emergency, employees may, with the approval of their manager or department head, bear the costs on their own personal credit cards and claim via the expense process.

# Approval Process

This is where you can insert your approval process. If you’re working with a travel management company, they may ensure all travel is approved via an automated process or that only certain types of trips need to be approved, such as bookings that don’t comply with the travel policy. We’ve included an example of a basic approval process for you below.

It is the employee’s responsibility to ensure that they have obtained the necessary approval to travel, in writing, on behalf of the company from their manager or department head. The employee is also required to obtain in writing, any and all exceptions to the travel policy as approved by their manager or department head.

When approving travel the authorising person must ensure that:

* The travel is not to a restricted area
* The travel is for official <Company Name> business;
* The cost to <Company Name> is minimised;
* All relevant components of the travel are booked through <Travel Management Company>

# Booking Guidelines

Whilst the needs of the traveller will be taken into account, all company travel must be cost and time effective. <Travel Management Company> is committed to our cost reduction programme and will offer the lowest practical fare/rate at the time of booking. They will discuss the best options available, including suggesting changes to the itinerary to provide cost effective alternatives.

Travelling employees must help to reduce travel costs by:

* Planning well in advance wherever possible – this will ensure the best prices are obtained
* Planning travel with as much certainty as possible – open tickets are expensive and should be avoided.
* Be flexible for lower fares – if possible plan the trip around lower fare availability and then agree the meeting time.
* Discuss travel arrangements – this will assist with the itinerary and ensure that promotional fares are taken advantage of where possible.

## Flights

As a general rule, members of staff should book the most cost effective option.

* Flights less than 6 hour’s duration – Staff should travel in Economy Class
* Flights more than 6 hour’s duration – Staff may travel in Premium Economy or Business Class subject to approval of line manager.
* If you are required to travel in excess of 15 hours duration in a 48 hour period you may seek authorisation to travel business class

Indirect flights must be checked for fare comparison to direct flights; often an indirect service will be much more cost effective. This does depend on departure and arrival times, if an indirect service is much cheaper and arrives within a 2-hour window of the direct service the lower cost flight should be taken.

Unless unavoidable, it is recommended that not more than five employees from the same business unit travel in the same aircraft. If the employees are VP or higher level no more than three from the same business unit should travel together.

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### Personal Airline Reward Schemes

Frequent Flyer cards can be applied for and membership numbers added to your flight reservations in order to receive personal airline points.

Please note airlines offering reward schemes should not take preference over airlines offering lower fares.

### Luggage Restrictions

Generally one piece of hand luggage is allowed and one bag to be checked in. This will vary depending on the airline so be sure to check before travel. Baggage allowance will be shown on your E tickets or flight confirmation.

Low Cost Carriers do not generally include luggage, please advise how many bags you will be checking in when making your reservation. You will be charged at the airport for any baggage not pre booked, higher fees are payable at the airport than pre booking in advance.

### Ancillaries

As airlines increasingly unbundle some of their “ancillary services” the following applies to additional charges related to these:

|  |  |
| --- | --- |
| Baggage | Additional charges only for baggage that is reasonable and appropriate to the length and purpose of the trip. Excludes all sporting equipment unless pre-approved and directly related to the travel e.g. Golf clubs if attending golf tournament. |
| Preferred seats | Not permitted within policy but allowed at travellers expense |
| Inflight Food (Claiming actuals) | Permitted on international flights departing during traditional meal times. All other flights at traveller’s expense. |
| Inflight Drinks (claiming actuals) | Soft and other non-alcoholic drinks permitted relevant to flight length. Alcoholic drinks not permitted |
| Premium Check-in | As allowed by Frequent Flyer status permitted or at traveller’s expense. |
| Premium Boarding | As allowed by Frequent Flyer status permitted or at travellers expense. |
| Other at cost VIP Arrival and Departure Services | Only at travellers expense |
| Upgrades | Travellers are permitted to use personal points for upgrades |
| Upgrades – paid on departure | Only at travellers expense |
| Lounge Access | Lounge access may be permitted in certain circumstances and must be approved by the traveller’s Line Manager. |

## Hotels

Travellers should use hotels that offer value for money, whilst providing reasonable services for business travellers. All hotel accommodation (other than where included in a conference package) should be booked through <Travel Management Company>.

Hotel accommodation should not exceed the following rates per night.

London: £150

Other locations: £100

## Trains and Eurostar

National and International rail will be arranged through <Travel Management Company>. All staff are expected to travel Standard class. <Travel Management Company> will investigate the cheapest possible option for the rail journey requested, this may include a combination of single tickets as they are often more competitive than standard return tickets.

Low fare single tickets are restricted to date and time shown on the ticket, please advise if this is not suitable for your journey when requesting your ticket.

Underground can be included in rail tickets to London and for any journeys involving cross London transfer.

Cancelled rail tickets should be returned to <Travel Management Company> in order to apply for refunds.

## Ground Transportation

### Rental Cars

Vendor Selection

<Car Hire Company> is the preferred car rental supplier and employees are to use this supplier wherever possible.

Employees are required to utilise the designated car rental company unless:

1. No cars are available from the preferred vendor
2. The designated company does not provide service at the required location
3. When the preferred car rental supplier is not available, other approved alternative vendors may be used.

Car Size

Employees are to rent a mid‑size or intermediate size car unless travelling with more than 3 employees, or if the approved business case justifies the use of a larger vehicle.

Restrictions

Car rentals should only be utilised when cost effective to do so. The use of a rental car must be justified by an economic need, not a matter of personal convenience. The employee should compare the use of a taxi and/or hotel shuttle against the cost of a rental car including insurance, fuel, and parking at the hotel as well as the place of business.

Refuelling Charges

Employees must refuel rental cars prior to return in order to avoid surcharges. The cost of the fuel is reimbursable when accompanied by original receipts.

Insurance

Car rental companies will offer options to purchase types of insurance, most commonly called collision damage waiver (C.D.W.) and personal accident insurance (P.A.I.) at time of rental. Employees are to decline both of these options. The company will be responsible for expenses incurred as long as the employee is not charged with a negligent offense.

Employees are reminded to check the rental car before leaving the lot for any damage to the car. Any scratches or dents must be noted on the rental form. In the event of an accident, employees are to complete a Vehicle Accident Report, and submit to their immediate supervisor within three days of the accident.

Parking / Tolls

All parking and toll charges incurred by the employee on company business are reimbursable. Charges are to be reported on the expense report.

Traffic Fines

Traffic fines are not a reimbursable item. Employees are encouraged to comply with all country, state and local city traffic laws.

Hotel Shuttles and Taxis

Complimentary hotel transfers to and from the airport are to be utilised whenever possible. When the hotel does not supply an airport service, a taxi should be used whenever possible and convenient to and from the airport.

Employees should make a prudent business decision on the choice of taxi versus other ground transport and should only be used where there are convenience or safety issues that justify the additional cost.

Where possible, payments should be by credit card and a receipt obtained.

Employees should not travel in the front passenger seat of a taxi.  
  
Limousine and Shuttle Services

Limousines should only be used when they are less expensive than alternative means of transportation or when there are convenience or safety issues that justify the additional cost. An example would be when travelling with others and coordinating arrival times.

Limousines should be booked through <Travel Management Company> only.

Private Vehicles

When an employee is asked to use his/her personal car for company business, the employee will be reimbursed for the fuel utilised at the rate allowed, currently £0.45 per mile.

Parking and tolls for business purposes are an allowable expense for approved private vehicle use. Note no other additional claims in relation to the use of a private vehicle will be reimbursed.

The employee is responsible for private vehicle insurance and cannot claim any portion of this cost.

At the discretion of <Company Name> a company owned vehicle might be made available in place of the approval of private vehicle use. All relevant expenses incurred in relation to the operation of the company vehicle can be claimed in line with the expense management policy.

# Visas and Passports

Employees are responsible for ensuring that they have the relevant travel documents in hand to enable them to travel. These include Passports, Visas, Health documents, Vaccinations and other travel documents.

The company will reimburse the cost of obtaining and maintaining these documents if necessary for the employee’s travel.

The issue and renewal of Visas and Passports can be arranged through <Travel Management Company>. Where necessary they will advise if a visa is required and will supply full application requirements, visa forms and information to ensure you have the correct documentation for your travel plans. Please allow enough time for the visa to be checked, issued and returned before confirming your travel itinerary.

Please be sure to apply for a renewal of your passport in plenty of time before the expiration date, generally a minimum of 6-month duration is required on your passport for travel. In the event of your passport being stolen or lost, you should immediately contact the local British Embassy or the embassy of your nationality, which will be able to issue an emergency passport.

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# Risk Management

All travel whether domestic or international involves risk and as part of ABC Company’s commitment to its staff and our risk management strategies all staff, regardless of level or purpose of travel, are required to follow the approval processes documented in this policy document

## Travel to Restricted Areas

<Company Name> as part of the travel approval process will:

* Identify potential dangers or risks present in particular geographical areas where employees may travel;
* Advise employees of the risks they may face; and
* Take reasonable measures to control the risk, which may require specific actions by the employee.

In addition to the normal approval process all requests for travel to destinations considered high risk must be accompanied by a risk assessment covering:

* Whether the travel is essential or can be delayed;
* Identification of the specific risks involved; and
* Mitigation strategies to enable travel.

Once approved, employees must ensure they comply with all directives in relation to risk management. They must also ensure that any changes to planned itineraries/transport/accommodation or other travel related components are submitted for re-approval to ensure <Company Name> records accurately reflect all arrangements of the employee.

Employees should be prepared that the risk assessment may change before travel due to changes in one or more planned destinations. As a result, the travel may be re-assessed and still permitted or in extreme cases cancelled.

## Health

For reasons of employee security, travel is restricted to countries that have serious medical risks or conditions. This list of countries may be updated from time to time as per the company’s evaluations.

As part of the approval process to restricted areas the employee will be advised of inoculation requirements and other relevant health related requirements while travelling. It is the employee’s responsibility to ensure they meet these requirements and has requested travel with sufficient notice to commence vaccination protocols.

If an employee is aware of an existing medical condition that may be aggravated by the travel or difficult to manage due to one or more destinations this must be advised when seeking approval for the travel.

## Contact

The Company maintains a traveller database that is an important resource to ensure the safety of employees when travelling.

To support this, employees are responsible for ensuring all details in their travel profile are current at the time they depart including emergency contact numbers. <Company Name’s> preferred emergency contact is a mobile phone number.

## Security of Company Equipment and Information

It is the employee’s responsibility to ensure that <Company Name’s) property is kept safe and secure at all times.

When not in the possession of the employee all equipment is to be kept in a secure place e.g. In-room safe or safety deposit box.

Employees need to be conscious of the security of company information. Only secure networks should be utilised. The use of hotel business centres should be avoided but if required it is important to ensure that no data is left on the device and any external devices (e.g. USB sticks) have been removed and retained.

## Emergencies when travelling

<Company Name has contracted with XXXX to provide worldwide access to emergency and medical assistance services 24 hours a day.

XXXX can assist you with access to medical, personal, travel, security and legal services when away from home on <Company Name> official travel.

You can call XXXX on 12345689 at any time to gain assistance on simple or critical matters.

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## Accidents, Thefts and Other Safety Issues

Accidents, thefts and other crimes must be reported to the appropriate local authorities immediately and <Company Name> on the following number XXXXXXXX.

If you require immediate assistance you should contact XXXX on 123456789.

Employees are required to make themselves familiar with <Company Name’s> travel insurance policy inclusions and exclusions. NB regardless of excluded items and events all incidents need to be reported as advised above.

## Major Natural Disasters and Unexpected Political Events

In the event of a natural disaster or major political event, if the accommodation is still available the employee should remain in that location until contacted by either <Company Name or XXXX and then follow the instructions provided. The most likely form of contact will be via SMS.

If the accommodation is not available, the employee should wait in a safe and secure location until contacted by either <Company Name> or XXXX and then follow the instructions provided.

Mobile phones and laptops are critical devices to ensure communication lines so their power should be conserved. Mobile contact should be limited to SMS and all other applications should be shut down. Laptops should only be used when advised by SMS to do so. Employees’ families will be kept updated by <Company Name> during such events.

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