Scottish Graduate School of Social Science
Sgoil Cheumnaichean Saidheans Sòisealta na h-Alba

SGSSS Expenses Policy

Including travel, accommodation, internships, and other expenses

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Scottish Graduate School of Social Science
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1. Scope and Purpose

1.1 This policy sets out the rules for claiming travel, accommodation, subsistence and other expenses incurred in connection with Scottish Graduate School of Social Science (SGSSS) purposes.

1.2 The policy applies to social science doctoral researchers registered at a SGSSS member Higher Education Institutions (HEI) and academic participants of SGSSS events, meetings and training.

1.3 This policy applies to all expenditure not related to the individual funding status of the student. For information related to funding status, please email team@sgsss.ac.uk.

1.4 For the avoidance of doubt this policy supersedes any other SGSSS guidance on claiming expenses.

1.5 The policy will be reviewed annually in September and any changes approved by the SGSSS Head of Strategy and Operations. Minor changes may be made during the year and relevant parties informed where appropriate. The updated policy will be published on the SGSSS website.

2. Principles

2.1 Responsibility for compliance with this policy rests with staff or students making claims ("the claimant") for the reimbursement of expenses and their approving budget holder, whether that be SGSSS or an HEI on behalf of SGSSS.

2.2 The SGSSS assumes no obligation to reimburse expense claims that are not compliant with this policy.

2.3 The SGSSS will reimburse claimants for expenses which they wholly, necessarily and exclusively incur in the course of official SGSSS purposes. Only actual costs which are incurred as part of SGSSS purposes will be reimbursed. Items of a personal nature will only be reimbursed in exceptional circumstances.

3. Individual Responsibility

3.1 This policy ensures that claimants comply with SGSSS requirements and attempts to assist claimants and authorisers to understand what can and cannot be claimed for and what is considered reasonable. In the interests of value for money and to support the appropriate use of public funds, claimants are expected to be prudent in their spending. Authorisers are required to be diligent in their review and approval of expenses to avoid the SGSSS incurring any unnecessary expense.

3.2 Claimants and authorisers must aim to ensure that economy, efficiency and effectiveness are achieved in respect of all expenses incurred without compromising personal safety.

4. Equal Opportunities Statement

4.1 The Scottish Graduate School of Social Science believes that all doctoral students should have equal opportunity to succeed in their studies. We acknowledge that everybody's circumstances are different, and this can often make it difficult to abide by terms laid out in general policies.

4.2 If your personal circumstances and responsibilities outside of your doctoral studies make it difficult for you to participate in SGSSS activities or adhere to our policies, please contact us to discuss this further. Some examples of ways in which we may be able to offer support include (but are not limited to):

- Childcare costs during participation in internships or training events
- Exceptions to travelling by public transport
- Costs incurred by attending events offered by SGSSS that impact caring responsibilities

5. Training and Events

5.1 Claiming Travel Expenses (Students)

5.1.1 Travel pertaining to the conditions below can be claimed by any social science doctoral student registered at a SGSSS member HEI: Aberdeen; Abertay; Dundee; Edinburgh; Glasgow; Glasgow Caledonian (GCU); Heriot-Watt (HWU); Highlands & Islands (UHI); Napier; Queen Margaret (QMU): Robert Gordon (RGU); St. Andrews; Scotland's Rural College (SRUC); Strathclyde; Stirling; West of Scotland (UWS).

5.1.2 Travel can only be claimed by a student attending an SGSSS event (including but not limited to Advanced Training; Spring into Methods; Challenge Pathway Training; Student-led Training Award; Summer School; Induction; Student Symposium and Collaboration & Impact Showcase) where a place has been confirmed at the event prior to attending, and the student has attended the event.

5.1.3 In exceptional circumstances, advance payment of travel expenses may be made but approval must be sought from the SGSSS **before** making a claim (see 4. Equal Opportunities Statement).

5.1.4 Students can only claim for travel where they have travelled more than **30 miles from their home address or, in some circumstances (see point 5.1.5), the university where their doctoral research is registered.**

5.1.5 It is generally expected that claims will be from a home address near to where the doctoral research is registered. If a full-time student's address is not near their institution, but these living arrangements are known and agreed by their institution, expenses can be sought from this address. We would expect part-time students who do not live near their HEI to work to coordinate a visit to their home HEI alongside any SGSSS event, therefore expenses will be paid using the address of their home HEI. Those undertaking an internship or other activity related to their PhD may seek travel expenses using the most relevant address in the time period.

5.1.6 If the address is outside Scotland, permission must be sought from SGSSS **before** making a claim. In most cases where a student is travelling from outside Scotland, expenses should be claimed using the address of the main campus of the Scottish institution at which their doctoral research is registered.

5.1.7 Students should use the lowest cost public transport available. Tickets should be purchased as far in advance as possible to obtain the best value for money.

5.1.8 Mileage should only be claimed by a student if the option of public transport is not viable for the individual or cost savings can be demonstrated through car sharing. Mileage will be paid at HRMC rates, however a fuel receipt must be provided. To claim for this mode of transport, approval must be sought from the SGSSS **before** the event and prior to submitting a claim.

5.1.9 ESRC funded students should make their expenses claim through RTSG. Any funds used towards SGSSS events will not count towards a student's annual RTSG allocation.

5.1.10 All other students should make their claim through the SGSSS online form.

5.1.11 All receipts (for example, itemised bills or invoices not debit/credit card receipts) showing proof of payment must be retained, photographed or scanned and attached to the expenses claim form. Expenses will not be reimbursed if the claimant fails to provide proof of purchase.

5.1.12 All claims for expenses should be made promptly. Claimants should submit expense claims within **three months** of the expense being incurred unless an acceptable reason for delay can been provided. Once received and approved, administration staff may take up to thirty days to process the claim.

5.1.13 If an event has to be cancelled for reasons outside SGSSS control (including but not limited to serious damage to the venue, serious adverse weather conditions, industrial action or a pandemic/epidemic) please seek a refund from the travel company in the first instance. If a refund is not possible, please contact SGSSS for reimbursement. Proof of registration for the event, cancellation of the travel/accommodation and details of the non-refundable policies (or similar) must be provided alongside proof of payment.

5.2 Claiming Accommodation Expenses (Students)

5.2.1 Accommodation pertaining to the conditions below can be claimed by any social science doctoral student registered at a SGSSS member HEI: Aberdeen; Abertay; Dundee; Edinburgh; Glasgow; Glasgow Caledonian (GCU); Heriot-Watt (HWU); Highlands & Islands (UHI); Napier; Queen Margaret (QMU): Robert Gordon (RGU); St. Andrews; Scotland's Rural College (SRUC); Strathclyde; Stirling; West of Scotland (UWS).

5.2.2 Accommodation can only be claimed by a student attending an SGSSS event that lasts for two or more consecutive days (for example Spring into Methods or Summer School) where a place has been confirmed at the event prior to attending, and the claimant has attended the event.

5.2.3 If accommodation is provided or organised by the SGSSS then this should be requested if needed. After making a request, students should wait for confirmation that SGSSS-provided accommodation is not available before finding alternative accommodation.

5.2.4 In addition to clause 5.2.2, students can only claim for accommodation or request SGSSS-provided accommodation where they have travelled more than **30 miles from their home address.**

5.2.5 In exceptional circumstances, advance payment of accommodation expenses may be made but approval must be sought from the SGSSS **before** making a claim (see 4. Equal Opportunities Statement).

5.2.6 Students should book the lowest cost accommodation available. **SGSSS will only fund accommodation up to a maximum of £130 per night.** In exceptional circumstances, higher accommodation charges may be approved but students must discuss this with the SGSSS **before** making a booking (see 4. Equal Opportunities Statement).

5.2.7 ESRC funded students should make their expenses claim through RTSG. Any funds used towards SGSSS events will not count towards a student's annual RTSG allocation.

5.2.8 All other students should make their claim through the SGSSS online form.

5.2.9 All receipts (for example, itemised bills or invoices not debit/credit card receipts) showing proof of payment must be retained, photographed or scanned and attached to the expenses claim form. Expenses will not be reimbursed if the claimant fails to provide proof of purchase.

5.2.10 Some universities do not permit their staff and students to use AirBnB while travelling due to security concerns. Please ensure that your institution's current travel policy allows your choice of accommodation before making a claim.

5.2.11 When a claim has been approved by SGSSS, it cannot be revisited to increase accommodation costs.

5.2.12 All claims for expenses should be made promptly. Claimants should submit expense claims within **three months** of the expense being incurred unless an acceptable reason for delay can be provided. Once received and approved, administration staff may take up to thirty days to process the claim.

5.2.13 If an event has to be cancelled for reasons outside SGSSS control (including but not limited to serious damage to the venue, serious adverse weather conditions, industrial action or a pandemic/epidemic) please seek a refund from the accommodation provider in the first instance. If a refund is not possible, please contact SGSSS for reimbursement. Proof of registration for the event, cancellation of the travel/accommodation and details of the non-refundable policies (or similar) must be provided alongside proof of payment.

5.3 Claiming Childcare Expenses (Students)

5.3.1 Childcare expenses can only be claimed by a student if attendance at an SGSSS event has resulted in additional childcare costs (i.e. additional costs directly related to participation in the event, not costs that would be incurred by the student normally).

5.3.2 Reimbursement will only be received if the childcare has been booked with a registered scheme/care supplier.

5.3.3 ESRC funded students should make their expenses claim through RTSG. Any funds used towards SGSSS events will not count towards a student's annual RTSG allocation.

5.3.4 All other students should make their claim through the SGSSS online form.

5.3.5 All receipts (for example, itemised bills or invoices not debit/credit card receipts) showing proof of payment must be retained, photographed or scanned and attached to the expenses claim form. Expenses will not be reimbursed if the claimant fails to provide proof of payment.

5.3.6 All claims for expenses should be made promptly. Claimants should submit expense claims within **three months** of the expense being incurred unless an acceptable reason for delay can be provided. Once received and approved, administration staff may take up to thirty days to process the claim.

5.4 Claiming Expenses (Academic and Professional Services Staff)

5.4.1 The SGSSS does not typically reimburse academic or professional services staff from member HEIs for attending SGSSS events and meetings (e.g. HEI Admin Network, Dean's Network, Supervisory Board). The time they spend in support of the SGSSS has been donated by their institution and as such the SGSSS would anticipate any travel expenses to be covered by their HEI.

5.4.2 However, if academic or professional services staff from member HEIs are invited to speak at an SGSSS event, sit on a panel, or deliver a workshop, they may claim for expenses via the SGSSS online form following the guidance provided for students above. **Please note colleagues from the University of Edinburgh should make an expense claim as normal through People & Money and claim it back from SGSSS via internal transfer**.

5.5 Claiming Expenses (Associate Officers for Student Engagement)

5.5.1 Associate Officers for Student Engagement may claim travel expenses where they have attended an SGSSS function in their capacity as an Associate Officer.

5.5.2 Associate Officers for Student Engagement should claim through the SGSSS online form following the guidance provided for students above.

6. Internships / Research in Practice Placements

The SGSSS wants to ensure that students are not subject to greater expense by undertaking an internship; for example - by having to pay rent in two places at the same time.

Students can claim up to a maximum of £2,400 (for any internship arranged through SGSSS full or part-time) to cover all reasonable travel and accommodation costs for the period of the internship. For example, commuting or relocation costs. Travel expenses will be negotiated depending on the individual student's needs.

6.1 Claiming Travel Expenses

6.1.1 ESRC funded students should make their claim through RTSG. Any funds used towards SGSSS internships will not count towards a student's annual RTSG allocation.

6.1.2 All other students undertaking an internship should submit their claim through their own institution and **not** SGSSS. The institution will reimburse expenses on behalf of the SGSSS.

6.1.3 Expenses can be claimed for necessary travel between the student's home address (i.e. where the student ordinarily reside during their PhD) and the registered site of the internship. It is expected that any travel expenses incurred during the course of business (e.g. travelling to business meetings or events) will be reimbursed by the host.

6.1.4 Students should use the lowest cost public transport available. Tickets should be purchased as far in advance as possible to obtain the best value for money.

6.1.5 If students require a large, upfront payment in order to purchase a travel season ticket that is more economical, the student is required to submit a cost projection to their institution with a screenshot of the ticket price. Once the ticket is purchased, a receipt must be provided to the institution for auditing purposes.

6.1.6 Mileage should only be claimed by a student if the option of public transport is not viable for the individual or cost savings can be demonstrated through car sharing. Reasons must be provided for this to the institution and will be reviewed on a case by case basis.

6.1.7 All receipts (for example, itemised bills or invoices not debit/credit card receipts) showing proof of payment must be retained, photographed or scanned and attached to the expenses claim form. Expenses will not be reimbursed if the claimant fails to provide proof of purchase.

6.1.8 For the avoidance of doubt, internship travel costs can cover:

- If relocating, one trip to the region of the internship at the beginning of the placement
- Commuting to and from the workplace if accommodation has not been arranged close by
- Air travel to the region of the internship at the beginning of the internship, providing that it is less expensive (including all airport taxes, etc.) than the equivalent off-peak single train fare
- If relocating, one trip home at the end of the internship
- Air travel home at the end of the internship, providing that it is less expensive (including all airport taxes, etc.) than the equivalent off-peak single train fare

6.2 Claiming Accommodation Expenses

6.2.1 ESRC funded students should make their claim through RTSG. Any funds used towards SGSSS internships will not count towards a student's annual RTSG allocation.

6.2.2 All other students undertaking an internship should submit claims for accommodation to their own institution and **not** SGSSS. The institution will reimburse expenses on behalf of the SGSSS.

6.2.3 Accommodation costs will be reimbursed to students for whom relocation is necessary in order to undertake the internship.

6.2.4 Students who are required to relocate for the duration of the internship must secure accommodation independently.

6.2.5 The size of accommodation rented should be reasonable for one person. Ideally, students should be looking to rent one room in a shared house, a studio or a one bedroom flat.

6.2.6 For the avoidance of doubt, internship accommodation costs will **only cover monthly rent** and **will not cover:**

- Deposits
- Furniture hire
- Bills such as phone, internet and television license (unless these are already included within your rental package)
- Accommodation if you are staying with relatives without a lodger agreement
- Excessive accommodation costs (i.e. amounts deemed by the SGSSS to be unreasonable)
- Excessive accommodation (e.g. a two bedroom house/flat for one person)
- Council tax (students are exempt from paying council tax)

6.2.7 If the student intends to rent accommodation whilst on the internship, they will need to send a signed copy of the tenancy agreement to their institution as early as possible in order for the accommodation costs to be reimbursed. This will be paid out in a lump sum by the institution. Students must have a formal tenancy agreement in place, which states the names of the landlord and tenant, the subjects of the lease (address of the let), how much rent will be charged and the term/duration of the lease.

6.2.8 Some universities do not permit their staff and students to use AirBnB while travelling due to security concerns. Please ensure that your institution's current travel policy allows your choice of accommodation before making a claim.

6.2.9 When a claim has been approved by SGSSS, it cannot be revisited to increase accommodation costs.

6.2.10 Accommodation expenses may be paid in advance of the internship if the documentation outlined in clause 6.2.7 is provided.

6.3 Claiming Childcare Expenses

6.3.1 Childcare expenses can only be claimed by a student if participation in the internship scheme has resulted in additional childcare costs (i.e. additional costs directly related to participation, not costs that would be incurred by the student normally).

6.3.2 Reimbursement will only be received if the childcare has been booked with a registered scheme/care supplier.

6.3.3 ESRC funded students should make their expenses claim through RTSG. Any funds used towards SGSSS events will not count towards a student's annual RTSG allocation.

6.3.4 All other students should claim through their institution.

6.3.5 All receipts (for example, itemised bills or invoices not debit/credit card receipts) showing proof of payment must be retained, photographed or scanned and attached to the expenses claim form. Expenses will not be reimbursed if the claimant fails to provide proof of payment.

7. SGSSS Mentoring Programme

SGSSS wishes to encourage participation in our mentoring schemes by offering reimbursement for reasonable travel expenses to attend the SGSSS Mentorship Launch event and to meet with their mentor/mentee in person should that be of interest.

7.1 Claiming Travel Expenses

7.1.1 Mentees who live more than 30 miles from their mentors (provided mentors are based in Scotland) can claim for reasonable expenses for travel to meetings with their mentor.

7.2 Mentoring Programme Launch

7.2.1 Mentees who live more than 30 miles from the launch event can claim for reasonable expenses for travel to the launch event.

7.2.2 All claims can be submitted through the SGSSS online form.

7.3 Mentor Expenses

7.3.1 Mentors based in Scotland are eligible to claim for reasonable travel expenses to attend the launch event. Please note, it is not expected that mentors who live outside of Scotland will attend the launch in person. Therefore, mentors living outside the UK are not eligible to claim for travel expenses to reach the UK (e.g. SGSSS is not able to cover the cost of flights to the UK), but are eligible to claim for travel expenses once in the UK. It is expected that mentees will travel to their mentors for any in-person meetings in Scotland, therefore any additional travel undertaken by mentors is at their discretion.

7.3.2 Mentors should contact team@sgsss.ac.uk to claim expenses.

8. Subsistence

8.1 The SGSSS does not expect any claims to be made for subsistence. Food and drink costs are expected to be covered by students' normal financial arrangements, such as stipends or other self-funding sources. In some cases, SGSSS will provide lunch and refreshments during events. If breakfast is included in an accommodation rate and is within the £130 maximum, this will be covered.

8.2 Students undertaking an internship cannot claim for subsistence unless there are exceptional circumstances, and by prior agreement only.

9. Other Expenses

9.1 The SGSSS does not anticipate any other expenses, however, in exceptional circumstances additional claims may be approved. Decisions will be made on a case by case basis and claimants should contact team@sgsss.ac.uk to discuss this further.

10. University of Edinburgh Students and Staff

10.1 University of Edinburgh students and staff should also refer to the University of Edinburgh Expenses Policy.