

**Eligible Costs and the Reimbursement of Expenses  
for Northern Bridge Consortium (NBC)  
Studentship Award-holders**

This guidance applies to Northern Bridge Consortium, Northern Bridge, and National Productivity Investment Fund award-holders.

**NORTHERN BRIDGE CONSORTIUM** DOCTORAL TRAINING PARTNERSHIP



**Arts and Humanities Research Council**

The information below is relevant to:

- the NBC Large and Small Grant Schemes;
- the NBC Placement Scheme;
- expenses associated with Cohort Development events, including the Cohort Development and Innovation Scheme.

This document should be read in conjunction with the specific Guidance for the above schemes.

- **Please be advised that under no circumstances should you pay any costs before submitting an application unless you are prepared to bear those costs yourself. Approval of funding is not guaranteed.**
- **Should you submit receipts that are dated prior to the date an application for funding was approved, they will not be reimbursed.**
- **Retrospective applications (and claims) for activities that have already taken place will be rejected and returned to you without consideration.**
- **Eligible and non-eligible costs are established, and are not subject to negotiation between the award-holder, their host institution and the NBC.**

**Estimating Your Costs and a Guide to what is Eligible:**

When completing an application for funding, please consider the following:

**Travel and Accommodation:**

Travel should be by the most cost and environmentally effective means, having regard for:

- cost and value for money;
- reasonable comfort;
- time and duration of journeys (and connecting travel);
- requirement for flexibility of itinerary;
- our commitment to reduce carbon emissions;
- safety and wellbeing.

Travel should be booked as far in advance of the trip as possible to take advantage of lower prices. You should bear this in mind when preparing an application for funding and ensure it is submitted by the appropriate deadline to allow yourself reasonable time to respond to any queries that Directors

might have before making your arrangements. We recommend submitting an application **no less than three months before you intend to travel**.

You must obtain competitive quotes and demonstrate value for money. The best possible route, taking into consideration the principles above must be evidenced by, for example, a quotation or screenshot of an online booking form.

For **RAIL TRAVEL** you should take advantage of all types of discounted tickets, including any discounts that may be obtained through the use of railcards, and travel by **standard class only**. Two single tickets are often cheaper than a return ticket. The costs of railcards cannot be reimbursed.

**AIR TRAVEL** within the UK is not permitted except where you can demonstrate that this is less costly overall, taking account of other costs such as accommodation. You should choose the lowest cost appropriate schedule taking into the factors listed above. Air travel must be **economy** in all cases.

**HOTELS** should be selected on a best value basis, choosing the most economically priced room available. Costs should not exceed the following nightly limits for **short-term** stays of usually **seven nights or less**, inclusive of tax:

- London or Dublin: £140.00
- Rest of UK and ROI: £100.00
- Rest of World: up to £165.00 and **in line with room rates** stated here:  
<https://www.gov.uk/government/publications/scale-rate-expenses-payments-employee-travelling-outside-the-uk>

You should take advantage of, for example, rates offered by conference hosts for discounted accommodation where available.

Items such as mini bar items, pay per view TV, telephone calls, etc., will not be reimbursed. Where these are included in the bill, the costs must be deducted prior to the submission of the receipt for reimbursement.

A case can be made for the above rates for longer stays where an alternative such as renting is not possible. In general, however, where stays **exceed seven days**, you should source economically priced accommodation through, for example, <http://www.universityrooms.com/>.

The cost of **TAXIS** will be reimbursed if this is **the cheapest or most appropriate means of reaching your destination**. For example, this may be when public transport is unavailable, either early in the morning or late in the evening; where public transport would add significantly to the journey time; or where you feel your safety may be compromised otherwise. **You will be required to provide a short justification for the use of taxis when submitting your receipt(s), otherwise the cost will not be reimbursed.**

We will not meet the costs relating to a spouse/partner or other family members accompanying you, though they are permitted to do so. (If you are submitting receipts which includes the costs of anyone travelling with you, you can claim your portion of the costs only.) The NBC will not meet any additional costs where you choose to extend your stay for personal reasons.

### Other General Principles:

- We do not permit payment of **subscriptions** to professional organisations and societies. (*An exception may only be considered where an award-holder can evidence that the cost of attending a conference is considerably lower as a member of a professional organisation or society, and that the cost of becoming a member is considerably lower than the conference fee for non-members.*)
- You should familiarise yourself with the **insurance policies for postgraduate students** at your host institution before travelling. The NBC will not cover the cost of private travel insurance in addition to that provided by your institution.
- **Childcare** costs cannot be met from NBC funds under any circumstances.
- You will not be reimbursed for additional items that were not included in your funding application form without prior approval by the NBC.
- Under no circumstances can cash be used to **pay research participants** for their contribution to your research/data collection. Vouchers of a value of usually £5-£10 (depending on the number of participants) are acceptable, and you must be able to provide proof of purchase.
- **Contributions and gifts** (cash-equivalent) to friends and family hosting award-holders during placements, study visits, etc., **cannot** be met from NBC funds.
- The NBC **cannot** meet the cost of items that are not demonstrably solely for the purpose of primary research costs and the completion of the thesis, e.g. the printing of business cards; the purchase of monthly/annual travel cards; subscriptions to online resources such as LinkedIn, etc.
- Award-holders undertaking placements should refer to the *Placement Scheme Guidance* for further information on eligible costs specifically associated with placements.

Under no circumstances will the costs of **subsistence** be provided for under the Grant or Placement Scheme, except where these costs have been included in a package (for example, hotel bed and breakfast, and meals included as part of a residential training package are acceptable; a voluntary conference dinner is not.) In very exceptional circumstances, a contribution to subsistence may be made for activities in areas where, for example, the purchase of bottled water is necessary.

Please see below for the subsistence entitlement when participating at mandatory cohort development events.

Bookings must be made directly with the airline, hotel, etc., or via online travel sites, but not via a travel agent. You should not be influenced by any promotional incentives such as airline mileage credits, personal loyalty schemes, etc.

**Subsistence** can be reimbursed for mandatory NBC cohort development events, such as the annual conferences and Completion and Leadership workshop. You are eligible to claim for the following where this has not been provided by the host institution/venue or where you have opted to make your own arrangements due to, for example, dietary restrictions:

- A daily allowance of up to a maximum of £9.30 to cover lunch and additional refreshments +

- One evening meal per day of the event, including soft drinks, of up to £20.00.

The cost of **alcohol** will **not** be reimbursed. **Gratuities** will **not** be refunded unless they are included on an itemised bill as a service charge and not as an addition by the award-holder.

### Claiming Your Expenses

In the majority of cases all funding is provided on a reimbursement basis. Once an application for funding has been approved you then make your purchases, and submit an expenses claim to your **host institution**. You must therefore be prepared to bear the cost of your activities in the first instance.

In **exceptional** cases, where the approved amount far exceeds an award-holder's monthly stipend, an advanced payment **may** be made directly to your bank account in line with your host institution's own policies. Where a payment is required for, for example, rented accommodation over a number of months, it is most likely that you will receive payment in instalments in addition to your normal monthly stipend. If your host institution does not support an advanced payment policy, the NBC cannot overrule.

You must check with your host institution regarding how to claim your expenses. In most cases, you will be asked to complete a form specific to your university. You can only claim via your home institution for your expenses regardless of whether these have been incurred under the Grant or Placement schemes, or in attending a cohort development event.

Claims can be submitted immediately after bookings have been made, and prior to the event itself. You do not have to have undertaken the approved activity before seeking reimbursement but you must have **evidence that payment has been made**. The NBC cannot process a reimbursement on receipt of proof of an advance booking where payment will not be made until arrival/departure.

Follow-up claims for approved costs such as internal travel during an activity can be made afterwards. That is, you can submit more than one claim against the same approved activity.

You must retain and submit **detailed original receipts** without exception as proof of purchase to support all expenditure. (Online booking receipts are acceptable). **Costs that are not supported by a receipt will not be reimbursed**. The cost must be clearly visible on the printed receipt and costs stated on the claim form must **match** the receipts.

The purchased item must also appear clearly on the receipt. Credit or debit card receipts indicating a total only are not considered sufficient proof of expenditure and will **not** be accepted and cannot be reimbursed. Statements are not accepted as proof of purchase.

While at cohort events, under no circumstances should you pay any costs for a fellow award-holder and claim the total amount paid, even for smaller costs such as lunch. You should request your own individual receipt.

Claims must be made **within eight weeks** following the completion of the activity to which the expenditure relates.

You should be aware that the reimbursement of expenses is subject to the **Travel and Expenses Policies at your host institution** irrespective of the source of your studentship and funding. Expenses are not reimbursed by NBC administrators, but by the appropriate Payroll and Expenses teams at

your host institution, and therefore subject to the procedures and turnaround times of those teams.  
**NBC administrators cannot intervene in order to expedite payment.**

Incorrectly completed claims forms will be returned to you without reimbursement.

#### **A Note Regarding the Ownership of Equipment:**

If you have been approved reimbursement for the purchase of any specialist equipment such as digital recorders, cameras, etc., you are reminded that all such items remain the property of the NBC. You are required to return to your local NBC Administrator all items normally within two weeks of the end of your fieldwork, or data collection, etc., and no later than your latest thesis submission date.

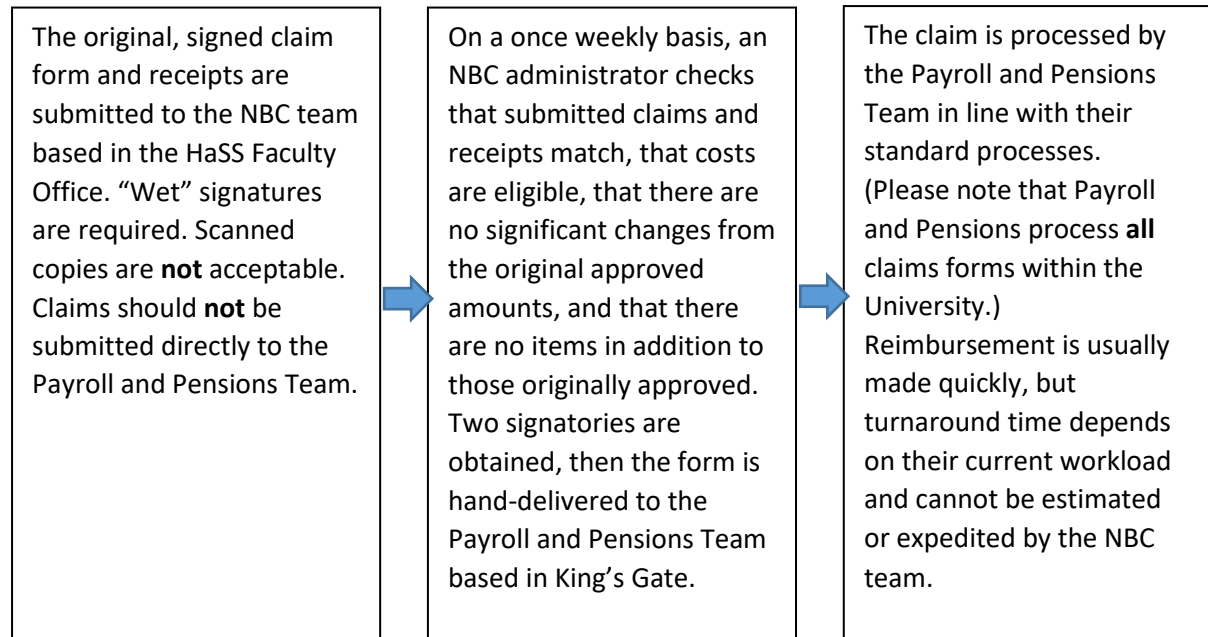
#### **Unforeseen Increases in Costs**

We appreciate costs can fluctuate between the submission of your application, approval and booking. Minor increases of a few pounds are acceptable and you are not required to seek additional approval to cover these. However, if the increase is significant, or you have any concerns about an increase in costs post-approval, please notify your local NBC Administrator.

<b>Version Control</b>	
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Last Amended By	Sarah Rylance

## Institution Processes:

### Newcastle:



Other institutions to follow...