

# Invitation to Quote

Invitation to Quote (ITQ) on behalf of **Medical Research Council**  
Subject Contracting Authority **PS17173 MRC Health Checks**  
Sourcing reference number **PS17173**

**UK Shared Business Services Ltd (UK SBS)**  
[www.uksbs.co.uk](http://www.uksbs.co.uk)

Registered in England and Wales as a limited company. Company Number 6330639.  
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**UKSBS**  
*Shared Business Services*

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# Section 1 – About UK Shared Business Services

## Putting the business into shared services

UK Shared Business Services Ltd (UK SBS) brings a commercial attitude to the public sector; helping Contracting Authorities improve efficiency, generate savings and modernise.

It is our vision to become the leading service provider for Contracting Authorities for of shared business services in the UK public sector, continuously reducing cost and improving quality of business services for Government and the public sector.

Our broad range of expert services is shared by our Contracting Authorities. This allows Contracting Authorities the freedom to focus resources on core activities; innovating and transforming their own organisations.

Core services include Procurement, Finance, Grants Admissions, Human Resources, Payroll, ISS, and Property Asset Management all underpinned by our Service Delivery and Contact Centre teams.

UK SBS is a people rather than task focused business. It's what makes us different to the traditional transactional shared services centre. What is more, being a not-for-profit organisation owned by the Department for Business, Energy & Industrial Strategy (BEIS), UK SBS' goals are aligned with the public sector and delivering best value for the UK taxpayer.

UK Shared Business Services Ltd changed its name from RCUK Shared Services Centre Ltd in March 2013.

## Our Customers

Growing from a foundation of supporting the Research Councils, 2012/13 saw Business, Energy and Industrial Strategy (BEIS) transition their procurement to UK SBS and Crown Commercial Services (CCS – previously Government Procurement Service) agree a Memorandum of Understanding with UK SBS to deliver two major procurement categories (construction and research) across Government.

UK SBS currently manages £700m expenditure for its Contracting Authorities.

Our Contracting Authorities who have access to our services and Contracts are detailed [here](#).

## Section 2 – About the Contracting Authority

### Medical Research Council (MRC)

The Medical Research Council is a publicly-funded organisation dedicated to improving human health.

The organisation supports research across the entire spectrum of medical sciences, in universities and hospitals, in its own units, centres and institutes in the UK, and in our units in Africa.

#### Supporting scientists

- Around 5,700 research staff is supported by the MRC, either employed directly in our institutes and units or funded through grants and fellowships.
- We spent £86m on training awards for postgraduate students and fellows in 2011/12, including those in the MRC's own institutes and units.
- At March 2012 there were around 1,900 MRC-funded PhD students and around 400 MRC fellows in higher education institutes and MRC research establishments.

#### Research examples

- The benefits of MRC research have a national and global impact; from infections in Africa, stem cell advances that can potentially combat brain and heart diseases and improvements in the design of tests for treatments. As well as more and better healthcare, medical research can lead to wider impacts; many millions more lives saved, a vastly improved quality of life and hence a more productive workforce and economic benefits to nations.
- MRC researchers have found markers for cancer cells that may help detect thousands of new cases of cancer a year. The markers are already part of an MRC-developed device that screens for cancer of the oesophagus, are being trialled for cervical cancer screening and could potentially be used in a test for bowel cancer.
- The NHS new born hearing screening programme, introduced in 2002, improves the early detection of hearing impairment in babies, allowing earlier and more effective treatment for the 900 babies born each year in the UK with permanent hearing loss.
- An estimated 73,000 adults are living with HIV in the UK, according to 2006 figures, but around a third of those people haven't been diagnosed and don't know they're infected. Black and ethnic minority populations accounted for just over half of all 7,000 new cases in 2006. Among many other aspects of HIV research, such as the molecular basis of the condition, treatments and diagnosis, MRC scientists are also researching social and behavioural factors.

<http://www.mrc.ac.uk>

## Section 3 - Working with the Contracting Authority.

In this section you will find details of your Procurement contact point and the timescales relating to this opportunity.

Section 3 – Contact details		
3.1	Customer Name and address	MRC  Polaris House, North Star Avenue, Swindon, SN2 1FF
3.2	Buyer name	Chloe Smith
3.3	Buyer contact details	Professional.services@uksbs.co.uk
3.4	Estimated value of the Opportunity	Estimated at £78,000 Excluding VAT
3.5	Process for the submission of clarifications and Bids	<b>All correspondence shall be submitted within the Emptoris e-sourcing tool. Guidance Notes to support the use of Emptoris is available <a href="#">here</a>.</b>  <b>Please note submission of a Bid to any email address including the Buyer <u>will</u> result in the Bid <u>not</u> being considered.</b>

Section 3 - Timescales		
3.6	Date of Issue of Contract Advert and location of original Advert	26/09/2017 Contracts Finder
3.7	Latest date/time ITQ clarification questions shall be received through Emptoris messaging system	02/10/2017 11.00
3.8	Latest date/time ITQ clarification answers should be sent to all Bidders by the Buyer through Emptoris	03/10/2017 14. 00
3.9	Latest date/time ITQ Bid shall be submitted through Emptoris	06/10/2017 11.00
3.10	Date/time Bidders should be available for phone call	10/10/2017 11.00

	clarifications if required	
3.11	Anticipated selection and de selections of Bids notification date	20/10/2017
3.12	Anticipated Award date	23/10/2017
3.13	Anticipated Contract Start date	25/10/2017
3.14	Anticipated Contract End date	30/04/2018
3.145	Bid Validity Period	90 Days

## Section 4 – Specification

### **Introduction**

The MRC employs circa 1,600 employees across 12 sites throughout the UK.

We anticipate around 750 MRC employees to take part in this year's health checks. However employee participation is not compulsory, therefore final numbers attending the health checks cannot be guaranteed in advance.

MRC has run a programme of on-site health checks for employees since 2014. This was previously measured by employees BMI and the Healthy performance.

### **Aims**

The aims of the following tender exercise is to source and contract a supplier to carry out the MRC health checks to take place during January to April 2018.

As part of the MRC's Wellbeing programme and non-pay related offering, the MRC health checks are offered to all MRC employees to provide individuals with an indicator of their health and wellbeing based on a number of key factors.

This allows individuals to become aware of any identified and potential hotspots as a result of the health checks and to take appropriate action or to seek further medical advice if needed.

Anonymised unit/ institute focused reporting provided to the MRC following the completion of all checks allows the organisation to identify any areas of employee health and wellbeing which may benefit from Corporate intervention as part of the MRC's Wellbeing programme. The aim of any identified intervention is to offer an improvement in the health and wellbeing of our employees.

### **Objectives**

To offer a range of dates and times to employees at each key location, enabling part-time and full time workers to benefit from selecting a time and date convenient to

their working hours/ patterns. This ideally would be offered via an online booking system.

For all participants of the health checks to have an immediate assessment of their own key health areas, and to be signposted for further advise or clinical assessment if identified during their check.

### **Requirement**

### **Scope**

To provide a health screening programme as per the detailed requirement on behalf of the Medical Research Council.

### **Timing**

Screenings to be provided at each of the below MRC units and institutes between the 15th of January and 28<sup>th</sup> of February2018.

Dates can be flexible however must include Monday, Tuesday, Wednesday, Thursday and Friday offering at each location between the core hours of 9:00 and 17:00 hours.

The option to add additional tests may be requested by MRC, dependant on employee take-up. Notice of a requirement for additional dates may be requested at relatively short notice and within 10 working days of checks at specific location/s.

### **Location**

Health checks to be carried out on-site at 10 separate MRC locations. Around 800 employees split across the following locations;

<b>Site Address</b>	<b>Address 2</b>	<b>Address 3</b>	<b>Address 4</b>	<b>Address 5</b>	<b>Post Code</b>
MRC Human Nutrition Research Unit	120 Fulbourn Rd			Cambridge	CB1 9NL
MRC Laboratory of Molecular Biology	Francis Crick Avenue	Cambridge Biomedical Campus		Cambridge	CB2 0QH
MRC LMB - ARES site	Babraham Research			Cambridge	CB22 3AT

	Campus				
MRC Head Office - London	14th Floor	One Kemble Street		London	WC2B 4AN
MRC Head Office - Swindon	2nd Floor, David Phillips Building	Polaris House	North Star Avenue	Swindon	SN2 1FL
MRC Regulatory Support Centre	University of Edinburgh	1 George Square		Edinburgh	EH8 9JZ
NC3Rs	Gibbs Building	215 Euston Road		London	NW1 2BE
MRC London Institute of Medical Science	Du Cane Road			London	W12 0NN
MRC Harwell	Harwell Science & Innovation Campus	Didcot		Oxfordshire	OX11 0RD
MRC Toxicology Unit	Hodgkin Building	PO Box 138	Lancaster Road	Leicester	LE1 9HN
MRC Centre for Macaques	Porton Down			Salisbury	SP4 0JQ

MRC Site Location	Approximate Number of Employees
Head Office Swindon	80
Head Office London (Kemble Street)	60
LMS Institute London	80
NC3Rs London	20
LMB Institute Cambridge	180
ARES Cambridge	100
EWL Unit Cambridge	40
Harwell Institute	159
Toxicology Unit Leicester	50
CFM Unit Salisbury	8

### **Tests**

Health screening to comprise of the following checks as a minimum requirement;

- Height & Weight
- Blood Pressure

- Heart Rate
- Body Fat %
- Hydration %
- Basal Metabolic Rate (BMR)
- Lung age
- Total Cholesterol
- HDL Cholesterol
- Diabetes
- Lifestyle Habits
- Lifestyle Review (via online assessment)
- Cardiac Risk assessment
- Estimated Daily Calories
- Bowel Screening for 50+ (**Optional**)

### **Health and Wellbeing Online Assessment**

The MRC would like to explore the option of offering employees an additional assessment (online) of their overall Health and Wellbeing, covering key areas such as;

- Alcohol consumption
- Smoking
- Fitness
- Nutrition
- Work life and home life stress/pressure.

An online assessment should be available online for the complete duration of all MRC health checks.

This report should be emailed to individual employees within 24 hours of the online assessment taking place.

A consolidated report per location should be available to the MRC within 8-10 weeks end date of online assessment.

### **Reports**

Same day personal report to be provided to each individual by email.

Anonymised company wide and unit specific summary reports to be provided within 8-10 weeks of final clinic.

### **Booking**

Online appointment booking system required. Employees must have the ability to book their health check online, they must also have the option to choose a convenient date and time for sessions available.

Employees should receive confirmation of their appointment via email (preferably as a diary invitation) and a text reminder (optional)

Key MRC contacts should also have access to the booking system to monitor take-up. The supplier should also liaise regularly with key MRC contacts regarding booking rates in order to maximise take-up and ensure that all employees have requested a check have the ability to make a booking (where possible.)

### **Promotional material**

The supplier should provide the MRC with dual branded (company logo and MRC logo) advertisement material to publicise and inform regarding the checks in order to maximise employee engagement.

### **Other Particulars**

Cost to include;

All expenses should be in line with MRC T&S Policy referenced in Annex 1.

A fixed price to be fully inclusive.

Confidentiality is crucial to the integrity of the service. Assurance that all information is secured and the systems used are UK Government compliant for sensitive personal data protection and the company is certified or equivalent to ISO 27001.

All Supplier personnel will have been security vetted and approved to Disclosure and Barring Service (DBS) standards.

The Supplier shall ensure implementation of mandatory requirements, supplier

accreditation, security standards and complying with CESG BC and HMG security policy frameworks.

The Supplier shall adhere to all Data Protection Acts ensuring the protection and security of employee data.

There must be appropriate clinical supervision given the nature of the contracting authority and the supplier must ensure that practitioners are able to offer a depth of specialism relevant to the specific area of each check.

### **Timetable**

Expected implementation of booking portal is 2 weeks.

MRC Health checks should take place between 15<sup>th</sup> of January and completed by the 28<sup>th</sup> of February 2018.

Dates must include a Monday, Tuesday, Wednesday, Thursday and Friday offering at each location between the hours of 8:00 and 17:00 hours. However these dates can be flexible.

The option to add additional dates may be requested by MRC, dependant on employee take-up. Notice of a requirement for additional dates may be requested at relatively short notice and within 10 working days of checks at specific location/s.

Anonymised company wide and unit specific summary reports to be provided within 8-10 weeks of the final clinic.

### **Pricing**

It is anticipated that there will be approximately 800 employees opting for the health check. The pricing schedule is based on this scenario and is subject to change. For this reason each health check will be based on the individual price provided.

### **Terms and Conditions**

Bidders are to note that any requested modifications to the Contracting Authority

Terms and Conditions on the grounds of statutory and legal matters only, shall be raised as a formal clarification during the permitted clarification period.

## Section 5 – Evaluation model

The evaluation model below shall be used for this ITQ, which will be determined to two decimal places.

Where a question is 'for information only' it will not be scored.

The evaluation team may comprise staff from UK SBS, and the Contracting Authority ----- and any specific external stakeholders the Contracting Authority deems required. After evaluation the scores will be finalised by performing a calculation to identify (at question level) the mean average of all evaluators (Example – a question is scored by three evaluators and judged as scoring 5, 5 and 6. These scores will be added together and divided by the number of evaluators to produce the final score of 5.33 ( $5+5+6 = 16 \div 3 = 5.33$ ))

Pass / fail criteria		
Questionnaire	Q No.	Question subject
Commercial	SEL1.2	Employment breaches/ Equality
Commercial	FOI1.1	Freedom of Information Exemptions
Commercial	AW1.1	Form of Bid
Commercial	AW1.3	Certificate of Bona Fide Bid
Commercial	AW3.1	Validation check
Commercial	AW4.1	Contract Terms
Price	AW5.5	E Invoicing
Price	AW5.6	Implementation of E-Invoicing
Quality	AW6.1	Compliance to the Specification
Quality	PROJ1.5	Timescales
Commercial	SEL3.11	Compliance to Section 54 of the Modern Slavery Act
-	-	Invitation to Quote – received on time within e-sourcing tool

Scoring criteria			
Evaluation Justification Statement			
In consideration of this particular requirement the Contracting Authority has decided to evaluate Potential Providers by adopting the weightings/scoring mechanism detailed within this ITQ. The Contracting Authority considers these weightings to be in line with existing best practice for a requirement of this type.			
Questionnaire	Q No.	Question subject	Maximum Marks
Price	AW5.2	Price	40%
Quality	PROJ1.1	Methodology	20%
Quality	PROJ1.2	Organisational Skills	10%
Quality	PROJ1.3	Flexibility	10%
Quality	PROJ1.4	Security	20%

## Evaluation of criteria

### Non-Price elements

Each question will be judged on a score from 0 to 100, which shall be subjected to a multiplier to reflect the percentage of the evaluation criteria allocated to that question.

Where an evaluation criterion is worth 20% then the 0-100 score achieved will be multiplied by 20%.

Example if a Bidder scores 60 from the available 100 points this will equate to 12% by using the following calculation:

$$\text{Score} = \{\text{weighting percentage}\} \times \{\text{bidder's score}\} = 20\% \times 60 = 12$$

The same logic will be applied to groups of questions which equate to a single evaluation criterion.

The 0-100 score shall be based on (unless otherwise stated within the question):

0	The Question is not answered or the response is completely unacceptable.
10	Extremely poor response – they have completely missed the point of the question.
20	Very poor response and not wholly acceptable. Requires major revision to the response to make it acceptable. Only partially answers the requirement, with major deficiencies and little relevant detail proposed.
40	Poor response only partially satisfying the selection question requirements with deficiencies apparent. Some useful evidence provided but response falls well short of expectations. Low probability of being a capable supplier.
60	Response is acceptable but remains basic and could have been expanded upon. Response is sufficient but does not inspire.
80	Good response which describes their capabilities in detail which provides high levels of assurance consistent with a quality provider. The response includes a full description of techniques and measurements currently employed.
100	Response is exceptional and clearly demonstrates they are capable of meeting the requirement. No significant weaknesses noted. The response is compelling in its description of techniques and measurements currently employed, providing full assurance consistent with a quality provider.

All questions will be scored based on the above mechanism. Please be aware that the final score returned may be different as there may be multiple evaluators and their individual scores will be averaged (mean) to determine your final score.

### Example

Evaluator 1 scored your bid as 60  
Evaluator 2 scored your bid as 60  
Evaluator 3 scored your bid as 40  
Evaluator 4 scored your bid as 40  
Your final score will  $(60+60+40+40) \div 4 = 50$

**Price elements** will be judged on the following criteria.

The lowest price for a response which meets the pass criteria shall score 100. All other bids shall be scored on a pro rata basis in relation to the lowest price. The score is then subject to a multiplier to reflect the percentage value of the price criterion.

For example - Bid 1 £100,000 scores 100.

Bid 2 £120,000 differential of £20,000 or 20% remove 20% from price scores 80

Bid 3 £150,000 differential £50,000 remove 50% from price scores 50.

Bid 4 £175,000 differential £75,000 remove 75% from price scores 25.

Bid 5 £200,000 differential £100,000 remove 100% from price scores 0.

Bid 6 £300,000 differential £200,000 remove 100% from price scores 0.

Where the scoring criterion is worth 50% then the 0-100 score achieved will be multiplied by 50.

In the example if a supplier scores 80 from the available 100 points this will equate to 40% by using the following calculation: Score/Total Points multiplied by 50 ( $80/100 \times 50 = 40$ )

The lowest score possible is 0 even if the price submitted is more than 100% greater than the lowest price.

## Section 6 – Evaluation questionnaire

Bidders should note that the evaluation questionnaire is located within the **e-sourcing questionnaire**.

Guidance on completion of the questionnaire is available at <http://www.uksbs.co.uk/services/procure/Pages/supplier.aspx>

**PLEASE NOTE THE QUESTIONS ARE NOT NUMBERED SEQUENTIALLY**

## Section 7 – General Information

### What makes a good bid – some simple do's 😊

#### DO:

- 7.1 Do comply with Procurement document instructions. Failure to do so may lead to disqualification.
- 7.2 Do provide the Bid on time, and in the required format. Remember that the date/time given for a response is the last date that it can be accepted; we are legally bound to disqualify late submissions. Unless formally requested to do so by UK SBS e.g. Emptoris system failure
- 7.3 Do ensure you have read all the training materials to utilise e-sourcing tool prior to responding to this Bid. If you send your Bid by email or post it will be rejected.
- 7.4 Do use Microsoft Word, PowerPoint Excel 97-03 or compatible formats, or PDF unless agreed in writing by the Buyer. If you use another file format without our written permission we may reject your Bid.
- 7.5 Do ensure you utilise the Emptoris messaging system to raise any clarifications to our ITQ. You should note that we will release the answer to the question to all Bidders and where we suspect the question contains confidential information we may modify the content of the question to protect the anonymity of the Bidder or their proposed solution
- 7.6 Do answer the question, it is not enough simply to cross-reference to a 'policy', web page or another part of your Bid, the evaluation team have limited time to assess bids and if they can't find the answer, they can't score it.
- 7.7 Do consider who the Contracting Authority is and what they want – a generic answer does not necessarily meet every Contracting Authority's needs.
- 7.8 Do reference your documents correctly, specifically where supporting documentation is requested e.g. referencing the question/s they apply to.
- 7.9 Do provide clear, concise and ideally generic contact details; telephone numbers, e-mails and fax details.
- 7.10 Do complete all questions in the questionnaire or we may reject your Bid.
- 7.11 Do check and recheck your Bid before dispatch.

## What makes a good bid – some simple do not's ☹

### DO NOT

- 7.12 Do not cut and paste from a previous document and forget to change the previous details such as the previous buyer's name.
- 7.13 Do not attach 'glossy' brochures that have not been requested, they will not be read unless we have asked for them. Only send what has been requested and only send supplementary information if we have offered the opportunity so to do.
- 7.14 Do not share the Procurement documents, they are confidential and should not be shared with anyone without the Buyers written permission.
- 7.15 Do not seek to influence the procurement process by requesting meetings or contacting UK SBS or the Contracting Authority to discuss your Bid. If your Bid requires clarification the Buyer will contact you. All information secured outside of formal Buyer communications shall have no Legal standing or worth and should not be relied upon.
- 7.16 Do not contact any UK SBS staff or the Contracting Authority staff without the Buyers written permission or we may reject your Bid.
- 7.17 Do not collude to fix or adjust the price or withdraw your Bid with another Party as we will reject your Bid.
- 7.18 Do not offer UK SBS or the Contracting Authority staff any inducement or we will reject your Bid.
- 7.19 Do not seek changes to the Bid after responses have been submitted and the deadline for Bids to be submitted has passed.
- 7.20 Do not cross reference answers to external websites or other parts of your Bid, the cross references and website links will not be considered.
- 7.21 Do not exceed word counts, the additional words will not be considered.
- 7.22 Do not make your Bid conditional on acceptance of your own Terms of Contract, as your Bid will be rejected.

## Some additional guidance notes

- 7.23 All enquiries with respect to access to the e-sourcing tool and problems with functionality within the tool must be submitted to Crown Commercial Service (previously Government Procurement Service), Telephone 0345 010 3503.
- 7.24 Bidders will be specifically advised where attachments are permissible to support a question response within the e-sourcing tool. Where they are not permissible any attachments submitted will not be considered as part of the evaluation process.
- 7.25 Question numbering is not sequential and all questions which require submission are included in the Section 6 Evaluation Questionnaire.
- 7.26 Any Contract offered may not guarantee any volume of work or any exclusivity of supply.
- 7.27 We do not guarantee to award any Contract as a result of this procurement
- 7.28 All documents issued or received in relation to this procurement shall be the property of the Contracting Authority. / UKSBS.
- 7.29 We can amend any part of the procurement documents at any time prior to the latest date / time Bids shall be submitted through Emptoris.
- 7.30 If you are a Consortium you must provide details of the Consortiums structure.
- 7.31 Bidders will be expected to comply with the Freedom of Information Act 2000 or your Bid will be rejected.
- 7.32 Bidders should note the Government's transparency agenda requires your Bid and any Contract entered into to be published on a designated, publicly searchable web site. By submitting a response to this ITQ Bidders are agreeing that their Bid and Contract may be made public
- 7.33 Your bid will be valid for 90 days or your Bid will be rejected.
- 7.34 Bidders may only amend the contract terms during the clarification period only, only if you can demonstrate there is a legal or statutory reason why you cannot accept them. If you request changes to the Contract terms without such grounds and the Contracting Authority fail to accept your legal or statutory reason is reasonably justified we may reject your Bid.
- 7.35 We will let you know the outcome of your Bid evaluation and where requested will provide a written debrief of the relative strengths and weaknesses of your Bid.
- 7.36 If you fail mandatory pass / fail criteria we will reject your Bid.
- 7.37 Bidders are required to use IE8, IE9, Chrome or Firefox in order to access the functionality of the Emptoris e-sourcing tool.
- 7.38 Bidders should note that if they are successful with their proposal the Contracting Authority reserves the right to ask additional compliancy checks prior to the award of any Contract. In the event of a Bidder failing to meet one of the compliancy checks

the Contracting Authority may decline to proceed with the award of the Contract to the successful Bidder.

- 7.39 All timescales are set using a 24 hour clock and are based on British Summer Time or Greenwich Mean Time, depending on which applies at the point when Date and Time Bids shall be submitted through Emptoris.
- 7.40 All Central Government Departments and their Executive Agencies and Non Departmental Public Bodies are subject to control and reporting within Government. In particular, they report to the Cabinet Office and HM Treasury for all expenditure. Further, the Cabinet Office has a cross-Government role delivering overall Government policy on public procurement - including ensuring value for money and related aspects of good procurement practice.

For these purposes, the Contracting Authority may disclose within Government any of the Bidders documentation/information (including any that the Bidder considers to be confidential and/or commercially sensitive such as specific bid information) submitted by the Bidder to the Contracting Authority during this Procurement. The information will not be disclosed outside Government. Bidders taking part in this ITQ consent to these terms as part of the competition process.

- 7.41 The Government is introducing its new Government Security Classifications (GSC) classification scheme on the 2<sup>nd</sup> April 2014 to replace the current Government Protective Marking System (GPMS). A key aspect of this is the reduction in the number of security classifications used. All Bidders are encouraged to make themselves aware of the changes and identify any potential impacts in their Bid, as the protective marking and applicable protection of any material passed to, or generated by, you during the procurement process or pursuant to any Contract awarded to you as a result of this tender process will be subject to the new GSC. The link below to the Gov.uk website provides information on the new GSC:

<https://www.gov.uk/government/publications/government-security-classifications>

The Contracting Authority reserves the right to amend any security related term or condition of the draft contract accompanying this ITQ to reflect any changes introduced by the GSC. In particular where this ITQ is accompanied by any instructions on safeguarding classified information (e.g. a Security Aspects Letter) as a result of any changes stemming from the new GSC, whether in respect of the applicable protective marking scheme, specific protective markings given, the aspects to which any protective marking applies or otherwise. This may relate to the instructions on safeguarding classified information (e.g. a Security Aspects Letter) as they apply to the procurement as they apply to the procurement process and/or any contracts awarded to you as a result of the procurement process.

## USEFUL INFORMATION LINKS

- [Emptoris Training Guide](#)
- [Emptoris e-sourcing tool](#)
- [Contracts Finder](#)
- [Equalities Act introduction](#)
- [Bribery Act introduction](#)
- [Freedom of information Act](#)

## Annex 1 MRC Non-employee T&S Policy

MRC Non-MRC Employee Travel, Subsistence and Expenses Policy



### **MRC Non-MRC Employee Travel, Subsistence and Expenses Policy**

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Version 1.0  
September 2015

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### Policy statement

The Medical Research Council (MRC) will reimburse claimants for the costs of travelling on official business. Travel and subsistence claims, as all MRC expenditure, are met from public funds, and attract public attention. Therefore it is imperative that there is full compliance with this policy and that claims are processed in a consistent and effective manner. All those travelling on MRC business, and making claims under this policy are expected to recognise their obligations to consider whether the trip is necessary, to consider alternative, cheaper options, and to make claims only in respect of costs properly incurred. Claimants should be aware that travel and expenses claims are disclosable under the Freedom of Information Act (see section 12).

In line with the MRC's commitment to environmental sustainability, claimants are encouraged to consider and try to minimise the environmental impact of journeys made on behalf of the MRC (see section 4.3)

This document incorporates the policy for travel on MRC business, including related aspects such as overnight accommodation. The purpose is to achieve travellers' service requirements in the most convenient and cost effective manner. The MRC will reimburse the actual additional costs necessarily incurred by claimants when they are away from home or their normal place of work on MRC business.

This policy applies to all non-MRC employees other than those who have access to an MRC Oracle account, as defined in section 3.1 of this policy

Claimants who are not MRC Employees, but who are working in MRC Head Office, or as a member of an MRC unit, and have access to an Oracle account (e.g. as a student, secondee or visiting worker), are considered as employees for the purposes of claiming expenses and are bound by the MRC Employee Travel and Expenses Policy. Please refer to that Policy available on Knowledge Base including for the arrangements for claiming expenses.

The MRC Non-MRC Employee Travel, Subsistence and Expenses Policy complies with statutory legislation and HM Revenue & Customs requirements. In addition, the MRC's policies are assessed for language accessibility and equality impact. The MRC's operational activities are regularly reviewed with key stakeholders and Trade Unions, who in turn contribute to the further development of the MRC's policies.

## **1. Principles**

- 1.1 The objectives of the MRC Non-MRC Employee Travel, Subsistence and Expenses Policy are:
  - To reimburse claimants promptly for expenses properly incurred on MRC business;
  - To obtain maximum value for money from the non-MRC employee's expenditure on travel and subsistence;
  - To ensure that the non-MRC employee's expenditure on travel and subsistence represents the necessary and reasonable costs incurred by or on behalf of those who are properly engaged on MRC business;
  - To minimise the cost of administering this expenditure, especially time spent by claimants making travel arrangements and submitting claims for reimbursement of expenses;
- 1.2 All expenses processed through the MRC accounts will be treated as if they were paid for by public funds irrespective of the actual source of funds.
- 1.3 The reimbursement of expenses is on a receipted and actual basis.
- 1.4 Reimbursement of expenses is regulated by the rules set out by HM Revenue & Customs (HMRC) and therefore this policy complies with those requirements.
- 1.5 Some of the provisions detailed within this policy are subject to tax in line with HMRC rules. If an expense is reimbursed to a non-MRC employee that is considered taxable, the MRC will notify the HMRC and the tax due will need to be paid to HMRC by the claimant. Separate rules apply to the reimbursement of taxable expenses for Board and Committee members as outlined in section 9.
- 1.6 Expenses will only be reimbursed if they are claimed in line with this policy.
- 1.7 The MRC recognises that in exceptional circumstances (e.g. emergency situations) a claimant may have to deviate from the MRC's policy. Such exceptional claims must be accompanied by an explanatory note, which will be judged on a case by case basis. All claims that deviate from the policy must be approved by the relevant unit or corporate director, or his/her nominee.
- 1.8 Monitoring of compliance with the requirements of this policy will be carried out on a regular and appropriate basis.
- 1.9 Localised policies that override the MRC Non-MRC Employee Travel, Subsistence and Expenses policy are not permissible.
- 1.10 Claimants may not claim the same expenses from the MRC and another body.

## **2. Definition of Terms**

### **2.1 Travel**

- 2.1.1 The terms of this policy cover non-MRC employee's travel to and from a location on MRC business (e.g. a board or panel meeting)

### **2.2 Subsistence**

- 2.2.1 The actual necessary and reasonable cost of meals and/or accommodation incurred by those engaged on official MRC business.

### **2.3 Claimant**

- 2.3.1 A person making a claim within the provisions of this policy.

### **2.4 Authorising Director**

- 2.4.1 A Unit or Corporate Director, or his/her nominee, with authority to approve claims which exceed Policy Limits or otherwise fall outside of the usual policy.

### **2.5 Authorising Manager**

- 2.5.1 An individual appointed by the relevant Director, with appropriate Delegated Authority, to authorise claims compliant with the Policy and within policy limits.

## **3. Scope of Policy**

### **3.1 Non-MRC employees**

- 3.1.1 Non-MRC Employees are defined in the [MRC Non-MRC Employee Policy](#). This policy applies to all non-MRC employees other than those who have access to an MRC Oracle account, this includes MRC Board and Panel members and those attending MRC events who are not MRC employees.
- 3.1.2 If the claimant is a non-MRC employee, but is a member of an MRC establishment (i.e. head office or an MRC Unit), and has access to an Oracle account and iExpenses (i.e. secondee or visiting worker), they should refer to the MRC Employee Travel, Subsistence and Expenses Policy. For the purposes of claiming expenses, the claimant is considered an MRC employee.
- 3.1.3 Application of this policy does not in any way confer employment rights on any such category of person where the same do not exist under statute.
- 3.1.4 Non-MRC employees, who do not have access to an Oracle account, must submit their expenses claims on a Non-MRC Employee Expenses Claim Form which can be accessed through their MRC contact or from the MRC website. Board and Committee members must use the Board and Committees Expenses Claim Form (see section 9), also available on the MRC website.
- 3.1.5 Interims/Consultants who operate as a company or are engaged via an interim agency should make (and pay for) their own travel arrangements and seek reimbursement through their invoice. If the company is registered for VAT the invoice must include VAT.

### 3.2 Interview expenses

- 3.2.1 The MRC may offer to pay applicants' expenses to travel by the most economic route to the MRC interview venue subject to approval by the recruiting manager. Interview related expenses should be claimed in line with this policy.

### 3.3 Payments to Participants

- 3.3.1 Where payments and/or travel expenses are paid to participants in research studies these can be reimbursed through petty cash, if the sums are small. Units should discuss their requirements with the UK Shared Business Services (UK SBS) finance team. Larger payments should be made using the **Non-MRC Employee Expenses Claim Form**. Payments to participants are made without any deductions for tax.

## 4. Travel Claims

### 4.1 Travel Approval

- 4.1.1 It is the responsibility of the claimant to ensure travel, subsistence and expenses are being covered by the MRC.
- 4.1.2 All expenses must be approved by the relevant director or authorising manager with appropriate delegated authority.

### 4.2 Mode of Official Travel

- 4.2.1 Claimants may choose their own form of transport subject to the overriding consideration of value for money. The forms of transport claimants may use in order of MRC preference are:
- Public transport by rail, tube, coach, bus, aircraft, or ferry;
  - Self-drive hire cars (where these are better value for money than private travel)
  - Privately owned vehicles, i.e. motor cars, motor cycles and bicycles
  - Taxis

### 4.3 Environmental Impact of Travel

- 4.3.1 Before booking travel claimants should consider whether the trip is necessary or whether teleconferencing or videoconferencing offer a viable alternative.
- 4.3.2 When arranging travel, the MRC encourages claimants to use the mode of travel that results in the least environmental impact. Government advice on reducing the environmental impact of business travel can be found on the Business Link website, see section 13.
- 4.3.3 Where choosing a more environmentally friendly mode of travel results in an increase in costs, the non-MRC employee must first seek approval from their MRC contact, who will require relevant director approval.

### 4.4 Public Transport – Class of Travel

- 4.4.1 Claimants are normally expected to travel standard class by train and economy class by air. All claimants should actively seek value for money where it is practical and feasible.

4.4.2 Claimants travelling by train who would otherwise have required hotel accommodation have the option of a sleeper cabin. This is limited to single occupancy of a twin berth which can be purchased alongside a standard class ticket.

4.4.3 Claimants should refer to section 4.5 below regarding first class travel.

#### 4.5 **Exclusion of First Class Travel**

4.5.1 In line with Government announcements of 24<sup>th</sup> May 2010, claimants are not permitted to travel by first class on any form of transport including air and rail.

4.5.2 This exclusion also applies to business class air travel.

4.5.3 Alternatives to first class travel must be sought in all circumstances.

4.5.4 The only exception to this is where a claimant has additional needs and requires first class rail travel. The claimant must seek authorisation from their MRC contact prior to booking this.

4.5.5 Travellers are welcome to upgrade from standard to premium economy, business or first class at their own expenses (or use of personal reward miles) but the MRC can only reimburse the cost of the standard fare.

#### 4.6 **Privately Owned Vehicles**

4.6.1 When undertaking a journey on MRC business, the driver is responsible for ensuring the vehicle is in a roadworthy condition.

4.6.2 When using their own vehicle, claimants must ensure that it is licensed, appropriately insured for business use and has a valid MOT certificate if applicable.

4.6.3 Reimbursements will not be made to any claimant who receives a fine for not ensuring the vehicle is appropriately insured or not having a valid MOT certificate.

4.6.4 Claimants may use privately owned motor vehicles and claim the appropriate mileage allowance rate (see Appendix 1) except when:

- There is suitable MRC provided transport readily available; or
- Public transport is better value for money

#### 4.7 **Mileage Allowances**

4.7.1 Payment for using privately owned vehicles(s) on official business will be by one of the ways set out below:

- The HMRC's approved rates for payment of mileage allowances will be made for journeys when it is of benefit to the MRC for an individual's private car/motorcycle to be used;
- Payment of a bicycle allowance for journeys when an individual uses a privately owned bicycle.

4.7.2 The allowances above are not subject to income tax or National Insurance contributions.

4.7.3 Details of the current rates of the allowances are set out at Appendix 1.

4.7.4 The MRC will only pay the HMRC approved mileage rate for the appropriate journey. These rates are subject to change by HMRC and such changes will be actioned by MRC at the time they are made.

#### **4.8 Passenger Supplement**

4.8.1 A passenger supplement per passenger per business mile may be claimed in conjunction with the mileage allowances in 4.8 in respect of each official passenger carried whose fare would otherwise be payable from MRC funds.

4.8.2 The current passenger supplement rate is listed in Appendix 1 of this document.

#### **4.9 Parking, Congestion Charges, Tolls, Ferries & Other Driving-Related Penalties**

4.9.1 Reasonable expenses incurred on parking, congestion charges, tolls and ferries may be claimed in respect of journeys which qualify for the mileage allowances in section 4.7 above. Receipts or other documentary evidence should be submitted as part of the claim.

4.9.2 Charges for overnight parking will be paid only when subsistence expenses are payable for the night(s) in question.

4.9.3 Should a claimant be liable for clamping or other parking/congestion charge penalty (e.g. because a meeting over runs or due to non-payment of a congestion charge) then reimbursement will not be made.

#### **4.10 Use of Mobile Telephones or Similar Devices when Driving on MRC Business**

4.10.1 Those travelling on MRC business are reminded that it is illegal to use a hand-held telephone or other similar device in a vehicle unless it is safely parked. Remimbursement will not be made to anyone on MRC business who receives a fine for driving whilst using a hand held mobile phone or similar device.

#### **4.11 Taxis and Self-Drive Car Hire**

4.11.1 It is recognised that the use of taxis can be in the interest of the MRC (e.g. when the journey by public transport would be considerably longer and more difficult or if the claimant has very heavy luggage etc)

4.11.2 Claimants who would find public transport impractical or inconvenient (e.g. claimants with disabilities, or those who would perceive themselves to be at a higher risk) may be reimbursed the cost of taxis. A receipt must be provided which must include the journey details and dates.

4.11.3 Claimants may claim for the costs incurred in hiring a self-drive car for a specific MRC purpose including the cost of the petrol for that specific journey when it is in the interest of the MRC (e.g. when there is more than one claimant making the same journey, when the destination is in a remote area or where savings are generated over alternative vehicle use).

#### **4.12 Air Miles Awarded by Airlines**

- 4.12.1 The MRC will not reimburse claims where private Air Miles have been used for MRC travel and the cash equivalent is sought upon redemption.
- 4.12.2 Where use of a personal credit card for payment attracts benefits associated with the card, this is permitted, but the overriding factor in choice of travel remains value for money.

### **5. Accommodation**

#### **5.1 Overnight Accommodation – Standards**

- 5.1.1 When overnight accommodation is required it is normally expected that claimants will obtain accommodation which meets the standards set out in Appendix 2 at the most economical rate available.
- 5.1.2 Appendix 1 provides the maximum normal limits for accommodation rates in the UK. Where, in exceptional circumstances, these rates need to be exceeded this should be approved by the relevant MRC director prior to booking.
- 5.1.3 A guide for overseas accommodation rates is available from the Foreign and Commonwealth Office via following link and these rates should be taken into account when booking accommodation.  
[https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/359797/2014\\_Worldwide\\_subsistence\\_rates.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/359797/2014_Worldwide_subsistence_rates.pdf)

#### **5.2 Overnight Accommodation – Choice of Hotels**

- 5.2.1 Wherever possible, the MRC expects claimants to use hotels at which discounts have been negotiated.
- 5.2.2 However, the preference of individual claimants in their choice of hotel will be respected subject to the overriding consideration of value for money.
- 5.2.3 Where such "discounted" accommodation is known to be available, reimbursement for bed and breakfast will be restricted to the amount that would have been spent if that accommodation had been used.
- 5.2.4 Flexibility may be applied in certain circumstances and claimants should discuss this with their MRC contact in advance, for example when:
- Discounted accommodation is not available
  - Claimants have disabilities
  - There are other practical needs e.g. where a claimant travelling alone may incur extra accommodation costs through safety and security need.

#### **5.3 Overnight Accommodation – Hotel Costs**

- 5.3.1 Subject to the restrictions set out in section 5.2 the actual costs incurred will be reimbursed, subject to the limits set out in Annex 1.

## **6. Other Subsistence**

### **6.1 Day Subsistence (meals and beverages)**

- 6.1.1 Claimants may claim the reasonable costs of meals taken in the course of business travel provided that they are on MRC business for more than five hours.
- 6.1.2 Meals should be of a reasonable cost and standard. Appendix 1 provides the maximum normal limits for meals expenses in the UK. This limit is inclusive of additional extras including tips. Where in exceptional circumstances, these rates need to be exceeded this should be approved through their MRC contact.
- 6.1.3 On the occasions where it is necessary for claimants to stay overnight in a hotel, the MRC will reimburse the cost of a reasonable evening meal within the limits listed in Appendix 1.
- 6.1.4 Reimbursement will not be made where a suitable meal is provided e.g. full board is provided.

### **6.2 Tips and Alcoholic Beverages**

- 6.2.1 Tips not exceeding 10% of the total bill will be reimbursed where such payment is included in the receipt and are included in the limits of Appendix 1.
- 6.2.2 Expenditure on alcoholic beverages will only be reimbursed when drinks are taken as part of a meal, and are included in the limits of Appendix 1.

### **6.3 Personal Incidental Expenses (PIE)**

- 6.3.1 Claimants required to stay overnight on MRC business may claim subsistence expenses under the rules provided for in this policy, including for personal incidental expenses.
- 6.3.2 When full board is included in the cost of the overnight stay, no subsistence will be reimbursed but a limited Personal Incidental Expenses can be claimed if justified to cover incidental out of pocket expenses.
- 6.3.3 The current Personal Incidental Expenses limit is listed in Appendix 1. All claim for PIE need to be submitted with itemised receipts. Claims for a flat-rate £5 are not permitted.

## **7. Specific Provisions for Overseas Travel**

### **7.1 Visa Fees for Overseas Travel**

- 7.1.1 Claimants required to travel overseas on MRC business will be reimbursed the cost of visa fees when necessary for the travel, on production of a receipt.

### **7.2 Exchange Rates**

- 7.2.1 Where expenditure has been incurred in a foreign currency the claimant should use the exchange rate prevailing at the time that they purchased the currency, or incurred the expenditure to calculate the cost in British pounds. This calculation must be accompanied by supporting paperwork e.g. a receipt for changing currency, credit card statement.

7.2.2 Where there is no evidence of the specific exchange rate (as in paragraph 7.2.1) then the expense claim should be made in the currency of the receipt. UK Shared Business Services (UK SBS) will calculate the exchange rate, based on that advised by the General Ledger team, on the 1<sup>st</sup> of each month.

7.2.3 Where an expense claim includes receipts in both local currency and British pounds, these should be totalled separately.

### **7.3 Currency Exchange Commission**

7.3.1 Claimants required to travel overseas on MRC business will be reimbursed the cost of currency exchange commission when accompanied by receipt/documentary evidence.

### **7.4 Immunisation and Inoculations for Overseas Travel**

7.4.1 Claimants required to travel overseas on MRC business will be reimbursed the cost of any immunisation treatments required for the travel on production of receipts provided that the travel has been approved and the non-MRC employee does not foresee any reason why they would not be able to travel overseas at the required time.

## **8. Other Expenses**

### **8.1 Family Travel**

8.1.1 The MRC will not meet any costs relating to the accompanying spouse/partner or family member of a non-MRC employee travelling on business.

8.1.2 Where spouses or companions accompany MRC employees, the costs must be separated appropriately (e.g. if a single room costs £70 and a twin/double £100, the £30 difference must be deducted from the claim).

8.1.3 Individuals will not be disadvantaged by personal circumstances in attending an event on MRC business. Where necessary, specific requirements should be discussed with the claimant's MRC contact in advance, and before incurring any expenditure.

### **8.2 Family Care Costs**

8.2.1 The MRC will reimburse reasonable additional family care costs that are incurred when attending an MRC meeting or event. These should be claimed through the relevant expenses claim form.

## **9. Board and Committee Members**

9.1.1 A Board and Committee member sits on an MRC Board/Panel/Overview Group/Steering Committee or visiting peer review panels and makes funding or strategic decisions on behalf of the MRC.

9.1.2 Board and Committee members should claim expenses for travel and subsistence in line with the principles of this policy that are additional to those costs directly booked and paid by the MRC.

9.1.3 Board and Committee who are MRC employees, (e.g. based within an MRC Unit or Institute) will need to claim their expenses through Oracle and iExpenses.

## **9.2 Board and Committee Member Expense Claims**

9.2.1 Under Income Tax Law, travelling and subsistence expenses incurred in connection with the duties of the appointment are normally taxable as part of income. However, under a special arrangement with the HMRC, it has been agreed that claims for expenses may be paid in accordance with this policy with no deduction of income tax provided receipts are enclosed with claims.

9.2.2 Board, Panel and Subcommittee members must complete a statutory declaration, sent to them after attending their first meeting, which indicates their acceptance of the arrangement.

9.2.3 The MRC will then meet any income tax liability arising on the payment. Expenses will not be taken into account for income tax purposes and should not be included in personal tax returns.

9.2.4 However failure to complete the statutory declaration will mean that the scheme cannot be operated and income tax and National Insurance contributions will be deducted from claims for which no further reimbursement will be provided by MRC.

9.2.5 Board and Committee members should claim expenses using the Board and Committee Members Expenses Claim Form, and send to their MRC contact.

## **10. How to claim reimbursement**

### **10.1 Claiming expenses and receipts**

10.1.1 Non-MRC Employees should claim expenses using the Non-Employee Expense Claim Form, unless they are a Board and Committee member (see Section 9)

10.1.2 All expense forms should be submitted to the claimant's MRC contact; Forms should not be sent directly to UK SBS.

10.1.3 The MRC is only able to accept original, hard copy expense claim forms, with a wet signature. MRC is unable to process scanned copies of expense claims.

10.1.4 All expenditure must be accounted for with original, hard copy receipts, which should be sent to the claimants MRC contact along with the expense claim form. Reimbursement for items without receipts will only be met in exceptional circumstances; this should be discussed with the claimant's MRC contact prior to submitting the claim.

10.1.5 Any claims without receipts should be supported by other evidence, if available. Claims should not be approved unless the relevant Director (or his/her nominee) is satisfied that the expenditure was incurred wholly, exclusively and necessarily in the performance of duties on behalf of MRC

10.1.6 Receipts should be individually attached to the claim form or put in an envelope marked with the claimants name and attached to the claim form.

10.1.7 Expense claims against transactions on credit card statements must be supported by individual original receipts.

10.1.8 Claimants are advised to keep a scanned copy or photocopy of the receipts submitted.

10.1.9 Expense claims may only be authorised by those holding appropriate Delegated Authority, in line with the MRC Delegated Authority Policy.

#### **10.2 Time limit for reimbursement**

10.2.1 Expense claims should be submitted for payment within three months of the expense being incurred.

10.2.2 If, exceptionally, this proves to be impossible, the claim form should be accompanied by a brief note explaining the circumstances, but reimbursement of expenses incurred is not guaranteed.

#### **10.3 False/Fraudulent Claims**

10.3.1 All claimants are responsible for completing claims accurately.

#### **10.4 Reimbursement of cancellation charges**

10.4.1 Non-employees travelling on MRC business will often book travel or accommodation directly, and seek reimbursement from the MRC. Wherever possible, accommodation should not be paid for in advance, to reduce costs incurred in the event of cancellation. If the MRC cancel or otherwise change a meeting, claims for travel costs already incurred will be met by the MRC. Claims will not be met where the claimant themselves chooses not to travel, or to use pre-paid accommodation.

10.4.2 Where it is more convenient, the MRC can make travel and accommodation bookings on behalf of those attending on MRC business, and meet the costs directly. However, individuals should be aware that when MRC has made the booking, but the claimant cancels travel and/or accommodation plans, then the MRC may seek to recover costs incurred.

#### **10.5 Claimants with Specific Needs**

10.5.1 It is recognised that claimants with specific needs may have additional requirements when travelling and staying in hotel accommodation. Therefore, as part of the MRC's Equal Opportunities policy, claimants with disabilities who incur extra cost for facilities for the disabled will be reimbursed; these costs must be stated within the claim.

10.5.2 Claimants with specific needs should not suffer inconvenience resulting from the failure to apply discretion and flexibility. Where a claimant with a disability requires a mode of travel or accommodation which, although is more expensive for the MRC, they consider to be a more practical and convenient method of transport for them, the claimant should raise this with their MRC contact for discussion in advance of making any bookings. Once the necessary approvals have been given, the claimant can make arrangements and will be reimbursed for the cost for the agreed mode of transport and accommodation.

10.5.3 MRC will seek to ensure that individuals are not precluded, through specific requirements, from contributing to MRC business.

**11. Application of the Procedures**

11.1 The aim of this policy is for fair and effective application of the procedures. All reasonable expenditure will be reimbursed and it is therefore important that all those who authorise claims share a consistent interpretation of what constitutes "reasonable".

**11.2 Appeals**

11.2.1 Non-MRC employees who consider that their claim or circumstances have not been considered or authorised fairly may follow the [MRC Complaints Policy](#) as a method of appeal against decisions taken.

11.2.2 However, all claimants are encouraged, in the first instance, to seek advice and guidance on their concerns from their MRC contact.

**12. Disclosure of Information Relating to Expenses Claimed**

12.1 From time to time the MRC may be required to publish information relating to expenses claimed by non-MRC employees, for instance in response to a Freedom of Information request. In such cases the MRC would normally release information at an aggregate or summary level.

In any instances where the public interest may favour disclosure the individuals affected would, wherever possible, be given the opportunity to comment on any information likely to be released.

Where copies of receipts or invoices are requested these will be made available as appropriate, taking into account any issues relating to personal data.

**13. Links**

- [MRC Complaints Procedure](#)
- [MRC Non-MRC Employee Policy](#)
- MRC Employee Travel, Subsistence and Expenses Policy
- MRC Non-MRC Employee Expense Claim Form
- MRC Board and Committee Member Expense Claim Form
- Business Link "[How to Cut Carbon Emissions from Business Travel](#)"

**14. Effective date**

14.1 This policy is effective from September 2015

**15. Review date**

15.1 This policy will be formally reviewed in June 2016

**16. Amendment history**

Version	Date	Comments/Changes
1.0	September 2015	New Policy

## Appendix 1 – Expenses allowances with effect from 06 April 2011

### 1. Mileage allowances for the use of the privately owned vehicles (section 4.7)

HM Revenue & Custom Mileage rates effective from 06 April 2011 onwards

	First 10,000 business miles in tax year	Each business mile over 10,000 in tax year
Cars and vans	<b>45p</b>	<b>25p</b>
Motorcycles	<b>24p</b>	<b>24p</b>
Bicycles	<b>20p</b>	<b>20p</b>

### 2. Passenger Supplement – cars and vans (section 4.8)

Per passenger per business mile for carrying fellow non-MRC employees in a car or van on journeys which are also MRC related for them.	<b>5p</b>
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### 3. Maximum accommodation rates in the UK (section 5.1)

London (including breakfast)	Maximum <b>£170 inc VAT</b> per night
Elsewhere in the UK (including breakfast)	Maximum <b>£120 inc VAT</b> per night

### 4. Maximum meals expenses in the UK (section 6.1)

Total per day for lunch and evening meal	<b>£40 inc VAT</b>
Lunch limit	<b>£15 inc VAT</b>
Evening meal limit	<b>£25 inc VAT</b>

### 5. Personal Incidental Expenses (section 6.3)

Per 24 hour period	<b>£5 inc VAT</b>
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## **Appendix 2 – Overnight Accommodation Standard**

### **Standard of overnight accommodation normally expected by MRC claimants on short Visits**

1. Single rooms with;
  - en suite facilities
  - TV
  - tea/coffee making facilities
  - a telephone in the room
  - internet access in the room
2. There should be adequate space and where it is necessary to work in the room, facilities (light, desk, telephone etc) for doing this.
3. The accommodation should have satisfactory personal security arrangements and adequate emergency procedures.
4. Restaurant facilities should be available either on the premises or locally, offering full breakfast and a reasonably priced menu for lunch and dinner.
5. Extras, such as newspapers, room service, mini-bar, film/DVD hire should be met by the claimant – please note this is not exhaustive.

#### **Please note:**

Claimants with special requirements, e.g. for managing a disability or complying with a religious obligation, are asked to ensure that these needs will be able to be met before any overnight accommodation is booked. In case of difficulty, please contact your MRC contact. Any information provided in these circumstances would, of course, be treated as confidential.