

## Financial Support for Travellers on LTA at CERN

Vsn 4.1 SJH 02/8/2018  
Changes indicated in red.

### Preamble

In the following, the person undertaking an LTA will be referred to as the *Traveller*.

STFC wants to facilitate the operation of the LHC experiments at CERN through the presence of UK staff on LTA. This requires that LTA costs are such that experiments can afford to support an appropriate number of people at CERN.

STFC also wants to ensure that Travellers are treated fairly and appropriately. This includes protection so that they are not financially disadvantaged by being at CERN, their standard of living is not unduly diminished and that their treatment is not dependent on which experiment they work. It is expected that people with similar circumstances will be treated in the same way.

Alas, experience shows that the concepts of “fairness” and “appropriateness” are far from clear and very subjective.

PPD has been asked by STFC to oversee the creation and implementation of the LTA policy. The proposals in this document come from the discussions with the LHC PIs in Summer 2017.

The centrepiece of this proposal consists of a Baseline to which it is expected most LTAs will adhere; however there is provision for deviations from this in appropriate circumstances.

These changes will become effective from 1 Apr 2019.

## Baseline Proposal

B1 **Nightly Subsistence Allowance (NSA)** may be claimed in the first year only of LTA for those Travellers with ties to the UK<sup>1</sup> at the nightly rate of:

- £17 single
- £21 married<sup>23</sup>
- £24 married, with one child
- £26 married, with more than one child

The appropriate rate must be agreed with the Budget Holder before the start of the LTA.

NSA is obtained by completing each month an *STFC Expenses Claim Form*.

NSA will not be paid to people recruited locally in the CERN area.

B2 **Rent** is supported in the first year of LTA up to a maximum rate per month of:

- 1000 € single
- 1250 € married (accompanied by spouse)
- 1500 € family (accompanied by spouse and at least one child)

For those “with ties”, in years 3, 4 and 5 of the LTA, the support will be reduced to 75% of the above numbers; for years 6 and beyond, it will be reduced to 50% of the above numbers.

For those “without ties”, in years 2, 3, 4 and 5 of the LTA, the support will be reduced to 75% of the above numbers; for years 6 and beyond, it will be reduced to 50% of the above numbers.

The resulting levels of support are referred to as the “Scaled Rent Contributions”.

The number of years out on LTA will be counted from 1 April 2018.

See details below concerning Rent Contributions and “Further Comments” for conditions of reimbursement.

B4 For people with ties on LTA for more than one year, the Traveller and accompanying family members will be entitled to one **home trip** per year to the UK. This should be agreed in advance with the Budget Holder and should be done by the most economical means (within reason).

Reasonable costs of **relocation** to and from CERN will be covered. These must be agreed in advance with the Budget Holder and the UKLO and should be consistent with STFC CEM 16B (6 m<sup>3</sup> allowance for a single person; 8 m<sup>3</sup> for a family).

The costs for a home trip and relocation should be claimed retrospectively.

For more details, visit the UKLO page <https://www.ppd.stfc.ac.uk/Pages/Before-Arrival-on-LTA.aspx>

Additional comments:

- a) **Overseas LTA Allowance** (formerly identified with the **ILW**) will not be paid.
- b) The onus is on the Traveller to obtain a **No Tax** (NT) code from HMRC. This can be obtained after the Traveller has spent one complete Tax Year on LTA. It may be possible to obtain tax relief for partial years, but this situation is not well defined.

**The Traveller is wholly responsible for arranging his or her own tax affairs with HMRC and the Local Tax Authorities. The Traveller must contact the Local Tax Authorities.**

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<sup>1</sup> To be assessed by Budget Holder. Usually taken to mean “owning a house” in the UK.

<sup>2</sup> Here and elsewhere: “or with long-term partner”.

<sup>3</sup> Here and elsewhere, married allowances will only be paid if the spouse is actually with the Traveller and is not working. If a spouse is working, all Allowances will be paid at the single-person rate; **if a spouse is working and there are children, all Allowances will be paid at the married-person rate.**

## Deviations from the Baseline

Under special circumstances, a Budget Holder and Traveller may agree support at a **lower or higher rate** than indicated in the Baseline.

However, it is expected that the majority of LTAs will adhere to the Baseline.

Possible reasons for lower funding include:

- a) The Traveller's LTA is not part of the strategic plan of the Project yet the Traveller wishes to be based at CERN.
- b) The Traveller may not have the costs associated with a home or immediate family in the UK.

In all cases which deviate from the Baseline, the Budget Holder will need to seek the agreement of the **Director of PPD** (or Deputy), as part of PPD's oversight role.

The proposals contained in this document differ to some extent from those set out in the **STFC Conditions of Employment Memorandum** (CEM) 16B. STFC Staff will not be forced to go on LTA should they be unwilling to accept terms offered to them which do not conform to the CEMs. Similarly, for STFC Staff already on LTA, if they are unwilling to accept revised terms offered to them which do not conform to the CEMs, then they will not be forced to stay on LTA but they will be able to return to their positions in the UK.

STFC expects that University Travellers will be treated similarly.

## Details concerning Rent Contributions

### **STFC Lease:**

If STFC Costs exceed the Scaled Rent Contribution, the Traveller must pay the difference.

### **Private Lease:**

UKLO will reimburse Rent + 200€/month (Utilities) up to Scaled Rent Contribution.

Traveller must demonstrate Rent and Utility costs.

### **Home Owners in France/Switzerland:**

UKLO will reimburse 200€/month (Utilities).

Traveller must demonstrate Utility costs.

## Further Comments

Dependent on the accommodation provided whilst on LTA, there may be **other charges** (such as house insurance) which are the responsibility of the Traveller.

Should a Traveller be in receipt of other means of support, such as a **CERN Scientific or Project Associateship**, then he/she should notify the Budget Holder and the UKLO. It is expected that someone on a CERN Associateship would not receive any STFC financial support for his/her LTA during this period.

Should a Traveller continue to receive **NSA** after one year, then it should be noted that after 23 months, HMRC requires that these payments are made through the Traveller's institute's payroll.

All **changes in circumstances** must be reported to the UKLO by submitting a new LTA application form and approved by the PI, Budget Holder and PPD Director. Failure to do so before the change takes place could mean reimbursement being delayed, reduced, or even refused.

Any **changes in cost** must be agreed in advance by the PI or Project Budget Holder.

To receive **reimbursement** for accommodation costs:

- All leases and utilities must be in the name of the Traveller on LTA.
- Leases and utilities will only be reimbursed for the address given on the LTA request form and only from:
  - The date the PPD Director approves the LTA application or change of circumstances or
  - the date the change comes into effect (e.g. move to new address), whichever is later.
- All invoices must be sent to the UKLO within one month of receipt.

In the event of a **dispute**, the PPD Director's decision is final.