**Guidance on Applying for an Overseas Institutional Visit Allowance**

These guidance notes supersede any previous versions.

The Overseas Institutional Visit allowance is designed to encourage international engagement of ESRC funded students and to provide financial support and time for so ESRC funded students can:

* establish research networks
* disseminate early research findings
* participate in seminars and other academic activities that are directly relevant to their research
* undertake specialist research training not available within the UK
* accessing data and/or archives in specialist areas of research that may not be available in the UK

Successful candidates will receive the following:

* Monies travel and subsistence support , on top of still receiving their full ESRC award;
* A funded extension at the end of their ESRC award, equivalent to the duration of the OIV (up to a maximum of 13 weeks).

**Who can apply?**

Subject to agreement on a case-by-case basis by the SWDTP:

* Full-time ESRC funded students in the doctoral stage of their award.
* ESRC funded students who are in the Masters stage of their award may apply but the OIV can only take place during the doctoral stage of their studies (see specific durations below).
* ESRC-funded part-time students can become eligible if they transfer status to full-time students for the duration of the fieldwork.

**Factors to consider**

Support for and Overseas Institutional Visit will only be provided where it is as part of a hosted visit to a higher education institution or an organisation with a substantive research office outside of the UK. This will ensure that the visit has a richer and broader scope to it, which will be of greater benefit.  Also, please note that some accredited courses are simply too expensive for us to fund.  If you are unsure, we can discuss any ideas or plans before you start drafting any application, so feel free to contact us.

**Funding cannot be awarded retrospectively**, and you must get full agreement before incurring any costs or undertaking any activity as monies will not be forthcoming if approval has not been given beforehand.

Each student can only submit **one** application for an Overseas Institutional Visit during the doctoral phase of their studentship.

The total period of the OIV **must not** exceed thirteen weeks in total, this is maximum not a target. Please see section on Guidelines for costings / things to consider for further info. Students and their supervisors should give consideration to the timing of institutional visits.

Visits are intended to be an integral part of the PhD research. As such, any visit in the first year of the PhD must not commence within the first three months of the doctoral studentship period and any visit taking place in the final year of the studentship must be completed at least three months before the end of the studentship funded period (calculated before the extension is applied).

Students who wish to undertake an OIV must discuss their application with the SWDTP Coordinator, Joanna Williams, and complete an application form (<http://www.swdtp.ac.uk/information-for-current-students/>).

All applications are considered by the SWDTP Coordinator and Manager, where appropriate and are subject to approval. Funding for these visits is assigned by the ESRC and is limited, so agreement is not automatic – it is therefore essential that applications are as complete as possible to ensure that the application can be properly judged on its merits.

Applicants must be supported by the supervisor and should demonstrate a clear planned programme of work with the identified host organisation(s) and/or host partner(s), which:

* Indicates a meaningful link to the applicants PhD project and demonstrate collaborations which add value to the student.
* Provides opportunities to establish research networks.
* Assists with the dissemination of early research findings.
* Includes directly relevant seminar and academic event participation, including access to specialist research training not available in the UK.

**If the Foreign and Commonwealth Office advises against visiting the country concerned, the SWDTP will not authorise payment of any contribution towards the institutional visit costs. All students are responsible for ensuring they have the necessary visa arrangements in place for international travel. Advice should be sought from the University’s International Office, or equivalent. Students studying under a Tier 4 visa may have further restrictions on their travel and should seek advice.**

Prior to funding being awarded by the SWDTP, you will be asked to confirm that you have been through your School / College / Departmental ethics approval and are following any local Health & Safety procedures. You will also be asked to confirm that you are physically and emotionally able to travel and to undertake the work for which funds have been provided.

**If you are an international student, ensure that you are in touch with your institutional visa team regarding change of location study requirements.**

**What does a successful application include?**

* A clear and robust case for why the visit(s) are important and the benefits to be gained.
* Details of collaboration or networking plans, including how these could be further developed following the visit(s).
* Information on how the visit(s) may contribute to your career and/or broaden academic horizons.
* Full commitment from your supervisor to continue supervision through the visit(s).
* Any expected outcomes from the visit(s) and details of how you will disseminate findings.

**How are costs determined?**

You are asked to provide quotes for actual costs, using travel sites or [numbeo.com](https://www.numbeo.com/cost-of-living/). All costings should be discussed with the SWDTP Coordinator as part of the initial conversation leading up to writing your application. Guidelines for acceptable costs are noted below. It is vital that value for money is taken into account when applying and all detail is in the application, as the SWDTP Coordinator reserves the right to cut some costs or to instruct some costs be covered by your RTSG. If any co-funding for travel or accommodation can be obtained from the institution(s) that you are visiting, this will significantly improve your application and can increase your chance of being funded. Once your application has been approved, no further monies can be awarded, and you are expected to manage your costs within the award envelope.

**IMPORTANT:** **The DTP is very unlikely to fund an OIV over a total of £3k.**

**IMPORTANT: If you are planning other trips (e.g., fieldwork) then you are asked to consider cost savings by combining trips, where possible.** If the OIV will take place alongside or immediately before/after an Overseas Fieldwork visit or Difficult Language Training visit, then we would expect to see the costs adjusted to reflect saving in travel. These cases can be discussed with the SWDTP Coordinator for detailed advice on what should be included. Check the travel insurance coverage and policies your institution can offer.

**IMPORTANT: It may not be possible for the SWDTP to fully fund a student’s OIV in all cases.** There may be additional funds available at the student’s home institution. Students should consult their supervisor or relevant PGR Office for further information about these opportunities.

Once the allowance has been allocated, it is the student’s responsibility to manage the funds within the award envelope. The allocation is for the student only and will not be increased to cover other expenses incurred whilst the student is abroad. An extension to the students funded period will be granted equivalent to the length of the OIV. Stipend will continue for the duration of the OIV.

Should the OIV be abandoned, reduced or unsuccessful, resulting in the student returning to the UK early, the SWDTP may recover the allowance less any reasonable expenditure already incurred. In exceptional circumstances, we can consider requests within an OIV application for additional costs where family members need to travel due to caring responsibilities. However, this must be in line with the scheme maximum.

**Ensure that you engage with and follow your local institutional processes for booking and managing travel and insurance arrangements (refer to the table at the end of this document for information)**

**Guidelines for Costings / things to consider**

* Ideally the visit would involve one return flight from a sustainability perspective and to keep costs down. Multiple flights need to be vigorously justified from an economic and environmental perspective, and will only be approved in exceptional circumstances
* Consider, for example, whether it is cheaper to fly mid-week than at the weekend. Always do a flight cost check before submitting the final application for approval
* If travelling to a European destination, investigate travelling by train
* Provide a link to the accommodation identified on the application form. A reasonable threshold that we would consider funding is £80-90 per night. Review accommodation details for a good rating, insurance, indication of fire / smoke alarms and refund policy (refer to any institutional accommodation booking policy)
* Ensure you have fully checked cost comparison sites for other forms of transport that may be required e.g. car hire
* Check the travel insurance coverage and policies your home institution offers.
* The maximum time allowed for OIVs by ESRC is 13 weeks. This is a maximum, not a target and ordinarily we would expect to fund visits of around 6-8 weeks in country. Consider if you can undertake the OIV in a blended capacity e.g., 6 weeks in country and 2 weeks remotely. The cap for remote follow up working post visit is 1-2 weeks and must be justified on the application form with an outline of post visit collaborative working.

**When to apply**

Applications can be submitted at any time, as per the process outlined. The SWDTP Coordinator will consider the application within one month of submission. **Retrospective applications for overseas visit expenses will not be considered**. The process can take up to three months from discussion to funding approval, so you must leave enough time for this or risk not being able to submit an application that matches your travel dates.

**NOTE: If your studentship is match funded, the approval process may take an additional week.**

**How payments are made**

Once an application has been approved by the SWDTP Coordinator, the student’s home institution will manage payment arrangements. Approved funds will be transferred by the SWDTP to the institution in accordance with the financial regulations set out in the SWDTP ‘Partnership Agreement’. he process for how to access these additional award monies will be provided to you by local finance / Professional Service colleagues.

**What to do on return from the visit?**

Students should contact their relevant PGR Office on return from their fieldwork. This allows the administrator to update the University record system.

An End of Visit report must also be completed and sent to the SWDTP Coordinator within two weeks of your return. The form will be sent to you on funding approval. It is a condition of the additional funding that you complete and return the report.

If you have any queries please contact: Joanna Williams, SWDTP Coordinator at [Joanna.Williams@bristol.ac.uk](mailto:Joanna.Williams@bristol.ac.uk).

**Follow the travel booking procedures of your home institution. Your home institution can also provide travel insurance.**

|  |  |
| --- | --- |
| Bath | [Making bookings for business travel (bath.ac.uk)](https://www.bath.ac.uk/guides/making-bookings-for-business-travel/) |
| Bristol | [Travel and working off-site | Safety and Health Services | University of Bristol](https://www.bristol.ac.uk/safety/staff/travel/) |
|  | [Travel | Compliance and Risk | University of Exeter](https://www.exeter.ac.uk/departments/cgr/insuranceauditandrisk/insurancepolicies/travel/)  See link to Travel Policy under the International heading, this also include a link to Key Travel booking |
| Plymouth | [Stay safe overseas - University of Plymouth](https://www.plymouth.ac.uk/about-us/university-structure/service-areas/equality-diversity-and-inclusion/safe-travels-guide) |
| UWE | [Study and work abroad guide - Global experiences | UWE Bristol](https://www.uwe.ac.uk/life/global-experiences/study-and-work-abroad-guide) |
| Bath Spa | Contact the Graduate College for information on the process [pgrcurrentstudents@bathspa.ac.uk](mailto:pgrcurrentstudents@bathspa.ac.uk) |
| Bournemouth | Faculty of Media & Communication: <https://brightspace.bournemouth.ac.uk/d2l/le/lessons/53622/units/1644400>  Faculty of Science & Technology: <https://brightspace.bournemouth.ac.uk/d2l/le/lessons/80396/units/627850>  Bournemouth University Business School: <https://brightspace.bournemouth.ac.uk/d2l/le/lessons/266719/topics/1887466>  Faculty of Health & Social Sciences: <https://brightspace.bournemouth.ac.uk/d2l/le/lessons/63649/topics/2038494> |
| Plymouth Marjon | TBC |