



## **Terms and Conditions of Travelling Fellowships Awarded by the British Orthopaedic Association (BOA)**

The following updated terms and conditions apply to all travelling fellowships awarded for 2022 onwards.

### Eligibility

1. Applicants must be current members of the BOA in good standing, either as Home Associates, Post-CCT members, or SAS Surgeons. Applicants must be up-to-date with their subscription payments, and Post-CCT members are eligible as long as they have not taken up a Substantive Consultant post or been appointed to one by the closing date of 25 October.
2. Applicants who have previously applied for a fellowship but been unsuccessful may apply again.
3. Applications will not be accepted from candidates who were successful in the previous year's round e.g. if you successfully applied for a Fellowship in the 2021 round (with decisions made in December 2021), you will not be eligible to apply in the 2022 round.

### Applications

1. For 2022/23, some adjustments to fellowships have been made:
  - a. Applications will be accepted for fellowships to take place in the UK, Europe and other worldwide destinations.
    - i. Other logistics and precautions related to COVID-19 restrictions must be thoroughly thought through. These include: vaccination or testing rules, length of stay allowed, quarantine procedures etc. in the proposed country of travel.
  - b. The proposed fellowship may take place at multiple visit sites in the proposed country of travel, or more than one country, if travel permits.
  - c. Fellowships may be for any duration.
  - d. The BOA recognises the uncertainty over the COVID19 situation and will advise successful applicants to only proceed with booking travel and accommodation when the risks of needing to curtail or change plans is low – you will be asked to liaise with us as you firm up your plans and confirm with us before you make your booking(s). We wish to avoid as far as possible (for both us, the fellow and the host), the inconvenience, costs and time involved in needing to rearrange planned travels. We will also need to be cognisant of any restrictions in terms of overseas travel and short notice requirements for isolating on return.
2. Fellowships cannot be awarded retrospectively.
3. Some of our Fellowships have specific eligibility criteria and applicants should ensure they check these carefully.
4. Fellowships must commence within 10 months of being awarded; fellows should anticipate being able to travel during this period when they apply.
5. The BOA fellowship funding can be used either as the primary funding source for the proposed visit or to provide a contribution towards a fellowship visit (with additional funding coming from other sources including the fellow themselves).
6. Awarded funds should be used to cover the costs of economy class travel, accommodation, food and (limited) subsistence only.
  - a. Awards should not be used for attendance at conferences/meetings.



- b. If you are due to receive a salary during the fellowship you should not apply for food/subsistence funding; if this grant will supply your only income during the fellowship then you are welcome to include food/subsistence funding within your grant.
7. Award funds should be used to cover the costs of the individual awarded the fellowship only. In particular, Award funds may not be used to cover the costs of partners or other family members to accompany the Fellow.

### Fellowship Reports and Publicity

1. On completion of the Fellowship, the BOA requires all successful applicants to submit a report and executive summary about their Fellowship:
  - a. Reports must be submitted within 6 weeks of Fellowship completion but earlier if possible.
  - b. Reports should be submitted in a Word document (.doc or .docx) format
  - c. Reports should be of approximately 1,000 words, with an executive summary of approximately 250 words.
  - d. Reports should focus on the education and clinical benefits of the fellowship and both the report and executive summary should include 1-4 photographs relating to the fellowship.
  - e. Both the report and executive summary must acknowledge the support of the BOA and external funder (if any).
  - f. The BOA reserves the right to withhold a proportion of Fellowship funds until a final report meeting these requirements is submitted (see funding arrangement details below).
2. The BOA reserves the right to publish reports and photographs on the BOA website, in its publications and publicity, and for any other purposes as it sees fit. The BOA also will provide copies of the reports or extracts from them to external funders of the fellowships.

### Calculating funding when applying

1. **The BOA and external sponsors support these fellowships as a charitable activity to support career development.** It is important that funds are spent appropriately and thus we provide the following guidance. Where each fellow spends modestly, this can allow us to send more trainees on fellowships. The BOA reserves the right to decline claims that do not meet these principles.
2. **Travelling to and from your destination.**
  - a. Costs of economy class travel should be estimated and presented on the application form. The BOA will be understanding towards later bookings where there is uncertainty about travel. We still ask fellows to travel as economically as they can and certainly within the funding amount offered for the fellowship if successful. Reasonable costs of airport transfers can also be claimed.
  - b. Where the travel is within the UK, we appreciate that there will be many ways to organise this – some people may be able to live at home and commute to the host site, others may be able to stay with family or friends, while others may need accommodation. Your fellowship proposal needs to outline how you would undertake the proposed fellowship and the associated costs, and should aim to provide good value for the funds spent.
3. **Accommodation.** Some fellows choose 'AirBnB' type self-catering accommodation, others choose B&B or hotel accommodation. Your application should indicate the intended type of accommodation and anticipated cost. Hotels should be not more than 4\* (and 3\* may be sufficient in some destinations). AirBnB accommodation likewise should be suitably simple.



4. **Costs for visas, insurance and other travel documents** may be requested in your application – please provide accurate fees or figures.
  - a. Fellow should have relevant travel insurance from the time they book their travel/accommodation and read the fine print i.e. for cancellations/unforeseen circumstances and COVID coverage. The BOA is not liable to cover fellowships that are cancelled/not taken or for additional costs due to curtailing of fellowship e.g. due to ill-health or bereavement, as we usually expect these costs to be covered by insurance.
5. **Subsistence and daily travel** may be requested in your application if this grant will supply your only income during the fellowship. If you are due to receive a salary during the fellowship you should not apply for food/subsistence funding.
  - a. The maximum that fellowship recipients may request for subsistence and daily travel is £25 per day (the application should propose a level suitable to the destination listed on the application form, if subsistence is being requested). If the fellow is staying in self-catering accommodation the subsistence should be lower and based on supermarket costs, and not eating-out costs.
  - b. Alcoholic beverages and incidental costs e.g. room service surcharges will **not** be covered.
  - c. Itemised receipts must be provided to demonstrate amounts spent. Subsistence/food **cannot** be claimed as a “per diem” allowance due to audit requirements.
6. **‘In full’ funding and ‘contribution’ funding.**
  - a. Where the BOA is funding the fellowship in full, as the primary or main source of funding, then the eligible costs (i.e. under points 1-5 above) incurred can all be claimed as expenses based on reimbursement of receipts, up to the maximum amount awarded by the BOA.
  - b. Where the BOA is providing a ‘contribution’ towards the fellowship (either £5000, £2500 or £1500), then we will pay based on reimbursement of receipts up to the maximum awarded – the receipts can be for any of the eligible items above.
  - c. If a fellow is claiming funds from multiple bodies, the same receipts must not be submitted for reimbursement from the BOA as well as another body.

#### Claiming funding

1. Permissible Fellowship expenses (as above) will be reimbursed on provision of **itemised receipts**; all claims must be submitted using the BOA Claim Form provided and supported by original receipts.
2. Funds will be sent via BACS transfer.
3. We aim to process claims within 28 working days but if there are points of clarification or the claim does not meet the requirements below, this may take longer.
4. Funds will usually be released to recipients in two stages:
  - a. Prior to the fellowship, the BOA can accept reimbursement claims for expenditure incurred in advance, including flights and accommodation. The BOA will pay 80% of this claim upfront. The remaining 20% of this claim will be paid after the submission of the fellowship report.
  - b. Following the completion of the fellowship, the BOA can accept claims for expenditure incurred during the fellowship. These claims will be paid after the submission of a satisfactory fellowship report.
  - c. In some circumstances, the BOA may permit claiming of some funds during the Fellowship (for example during a long fellowship where the recipient would be incurring significant costs). Requests of this nature must be put in writing to the Finance Director and the Honorary Treasurer for consideration prior to the start of the Fellowship. Where this is agreed, the BOA



- will pay 80% of this claim upfront, with the remaining 20% of this claim being paid after the submission of a satisfactory fellowship report.
- d. For any fellow in circumstances where the total fellowship grant awarded exceeds £5,000, the BOA will consider paying 90% rather than 80% of the funds claimed before and during the grant. This would need to be requested in writing to the Finance Director and the Honorary Treasurer for consideration prior to the start of the Fellowship
5. Any claims submitted must be supported with **original receipts** or photographs of original receipts. These must be itemised receipts indicating how the funds were spent. (We appreciate that these may be in a different language.)
    - a. The BOA will no longer accept bank statements instead of receipts as there is no itemisation of the costs incurred. However, UK Bank statements (or copies) should be supplied to indicate the £GBP costs incurred if this is helpful (based on the exchange rate at the time of the transaction).
  6. If subsistence is being requested, the maximum that fellowship recipients may claim is the amount they have requested in their application form. Please note:
    - a. The BOA will **not** cover the cost of any alcoholic beverages.
    - b. The BOA will **not** cover the cost of surcharges (if meals are taken in hotel rooms), or other incidentals, such as newspapers and phone calls if charged to a hotel room.
  7. All funds will be paid in £GBP and should be to a UK bank.
  8. Where you are claiming for payments you made in a foreign currency, your claims should be submitted in £GBP. For card transactions, please use the exchange rate used by your bank at the time the cost was incurred (and supply a bank statement to show this), or for cash transactions, you can use cash exchange rate proof to calculate the £GBP amount.
  9. Claims must be made within 3 months of the Fellowship being completed and must follow the principles in these terms and condition. After this time period or if the terms and conditions are not met, the BOA reserves the right to refuse claims from Fellowship holders.

## The Fellowship

1. All fellowships must commence within 10 months of being awarded. In extenuating circumstances, the BOA will consider reviewing this timeline. Candidates would need to write to the BOA justifying the need for the extension. We encourage applicants to apply only if they are confident they will be able to travel during the specified period. Any applications for extenuating circumstances/extension must be submitted in writing to the BOA Education and Careers Committee as early as possible once the circumstances arise. Each application will be reviewed individually.
2. Awardees must seek permission from the BOA for any changes to their Fellowship programme from those outlined in their application **in advance** of agreeing to any changes to their programme. Only minor changes will be permitted and will be considered on a case by case basis. If the fellowship award has been linked to a specific subspecialty, it will not usually be possible to alter the award details, because of certain funding stipulations.
3. By accepting a Fellowship, all awardees are agreeing not to partake in any activities that will bring the BOA and/or the sponsors into disrepute.
4. Awardees are responsible for ensuring they have all relevant travel documents, visas and insurance for undertaking their fellowship. The BOA takes no responsibility or liability for these issues.
5. The BOA accepts no liability for the actions of fellows while on the Fellowship, or for activities related to it.



## Privacy Policy

1. **Processing of data:** The BOA takes the security and privacy of your data seriously. We have put together policies to comply with our legal obligations under the Data Protection Act 2018 (the '2018 Act') and the UK General Data Protection Regulation ('GDPR') in respect of data privacy and security. Please visit our website at [www.boa.ac.uk/privacy](http://www.boa.ac.uk/privacy) for information on the data we collect and how we use that data as part of our business and to manage our relationship with you.
2. Grant funders may request the name of the successful fellow for their records as well as a copy of the final fellowship report. By applying for a travelling fellowship, applicants are consenting to the sharing of their name to the external grant funder. In the unlikely event that the grant funder requests further personal details from successful fellows, such as an email address, the BOA will contact the fellow for their consent prior to sharing any further information.