



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 2019 onwards.

Eligibility & Applications

1. Applicants must be current members of the BOA either as Home Associates or SAS Surgeons and who are currently up-to-date with their membership subscription fees.
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 2018 round (with decisions made in December 2017), you will not be eligible to apply in the 2019 round.
4. Fellowships cannot be awarded retrospectively.
5. Some of our Fellowships have specific eligibility criteria and applicants should ensure they check these carefully.
6. Fellowships must commence within 10 months of being awarded; fellows should be able to travel during this period when they apply.
7. Awards will not be made to supplement funded or salaried fellowship posts.
8. 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).
9. Awarded funds should be used to cover the costs of economy class travel, accommodation, food and (limited) subsistence only.
10. Claims should relate to the costs of the individual undertaking the fellowship only (and not any family members).

Fellowship Reports and Publicity

1. On completion of the Fellowship, the BOA requires all successful applicants to submit a report about their Fellowship:
 - a. Reports must be submitted within 6 weeks of Fellowship completion but earlier if possible.
 - b. Reports should be of approximately 1,000 words, with an executive summary of approximately 250 words.
 - c. Reports should focus on the education and clinical benefits of the fellowship and both reports should include 1-4 photographs relating to the fellowship.
 - d. The BOA reserves the right to withhold a proportion of Fellowship funds until a final report meeting these requirements is submitted (funding arrangements explained 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 *PLEASE NOTE THIS NEW GUIDANCE*

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.** Costs of economy class travel should be estimated and presented on the application form - tickets should be purchased well in advance of the departure. Reasonable costs of airport transfers can also be claimed.
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 countries). 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.
5. **Subsistence.** The maximum that fellowship recipients may request for subsistence is £25 per day (the application should propose a level suitable to the country 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. In both situations, receipts will need to be provided to demonstrate amounts spent.
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, up to the maximum amount awarded by the BOA.
 - b. Where the BOA is providing a 'contribution' towards the fellowship (either £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. Fellowship participants should claim their funds as outlined below: all claims must be submitted using the BOA Claim Form provided.
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 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 the 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.
5. Any claims submitted must be supported with original receipts or photographs of original receipts. These should 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. After this time period, the BOA reserves the right to refuse further claims from Fellowship holders.

The Fellowship

1. 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 10 month period. Any applications for extenuating circumstances must be submitted in writing to the BOA Education Board before the 10 month period expires. Each application will be reviewed individually.
2. Awardees should 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. If the fellowship award has been linked to a specific subspecialty or to visit a particular location (e.g. India), 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.