

**Regulations**  
**for the implementation and financing of one-day and multi-day events/retreats**  
**which cannot be held on the premises of the University of Bayreuth (UBT) and in which**  
**mainly employees of the University of Bayreuth participate**

**I. General**

Events/retreats and exchanges with colleagues are of great importance to the University of Bayreuth and its researchers. It is therefore a central concern of the University to actively promote scientific dialogue, networking, and communication in an appropriate and suitable setting. The following regulations apply to facilitate the planning and implementation of events/retreats.

As a general rule, events in which the majority of participants are employees of the University of Bayreuth should take place on the university premises. If events are planned outside the university premises, there must be valid reasons for this. Only in this way can travel and catering costs as well as rental expenses for external rooms be reconciled with the principle of economic budget management (see above).

The following regulations apply to events/closed meetings in which the majority of participants are employees of the University of Bayreuth.

**II. In which cases is it permissible to hold such events outside the premises of the University of Bayreuth and finance them from the university budget (including third-party and residual funds)?**

The events/retreats may

- be held to deepen scientific exchange within larger research networks (in particular DFG, federal funds, EU) or a research training group or similar,
- to prepare joint applications in which predominantly scientists from the University of Bayreuth are involved, or
- for important teaching and research objectives and strategic development for which this type of event is particularly suitable
- with the explicit approval of the funding body

in suitable hotels or other accommodations outside the UBT and financed from suitable/approved funds, provided that the costs incurred for travel, accommodations, meals, etc. are not disproportionate to the advantages of holding the event outside the premises of the UBT.

**III. What other conditions must be met for reimbursement?**

- 1) The submitted programme clearly indicates the official nature of the event; in particular, the proportion of accompanying and supporting programmes is of minor importance in terms of time.

- 2) There is a concise and convincing justification for holding the event outside the university premises. This includes information on the nature and objectives of the event.
- 3) The event takes place within a radius of 400 km of the UBT and does not require air travel. Exceptions are possible in the area of third-party funding if this is specified by the project sponsor or permitted in the approval basis. The relevant specification/permission must be attached to the application for preliminary review.
- 4) The event does not exceed a duration of three days and takes place only once a year; exceptions are possible in the area of third-party funding if this is specified by the project sponsor or permitted in the approval basis. The relevant specification/permission must be attached to the application for preliminary review.
- 5) The financing of participants' expenses does not extend to the provision of private benefits (e.g. covering the costs of private accompanying persons; leisure activities such as costs for the sauna or fitness area, e.g. in the conference hotel, which are not directly related to the scientific programme). The financing also does not include a (social) supporting programme.
- 6) When planning, efforts shall be made to keep travel costs low, e.g. by sharing travel arrangements. In these cases, too, the provisions of the Bavarian Travel Expenses Act regarding the necessity of using private cars apply.
- 7) Sections 1 and 3 to 6 of the UBT hospitality guidelines shall be complied with accordingly.
- 8) Public procurement law is taken into account before commissioning/ordering services. The [administrative instructions](#) for the procurement of goods and services are also observed. If you have any further questions on this subject, please contact the Procurement Department.

#### **IV. Procedure**

We recommend that you send your plans, together with all relevant documents, to Division III/3 of the ZUV for review well in advance of any planned event outside the UBT premises. Please allow four weeks for processing.

Division III/3, in cooperation with Division II/1, will provide you with feedback for detailed planning and cost planning. After this consultation, you will also have the necessary certainty for booking external services (otherwise, cost coverage is not guaranteed).

The travel expense procedure (application for a business trip) is still required. It is advisable to submit a collective business trip application.

#### **V. Settlement**

For efficient processing, it is advisable to request separate invoices for (1) accommodations and (2) meals (including breakfast, if applicable) / other expenses. The settlement of accommodation costs is sent to Division III/3 for further processing together with the approved business trip applications and the approval of the event. The invoice for meals (including breakfast, if applicable) and other expenses such as moderation kits or room rentals is sent to Division II/1.1.2 Accounting Office (from

where it is forwarded within the department if necessary). The "External Invoice" form, the list of participants and the approval of the event must be enclosed.

### **Checklist for simplified handling of a one-day and multi-day event/retreat outside the UBT**

- ✓ Duration of the event: max. three days
- ✓ Event usually takes place a maximum of once per year (exception: explicit third-party funding approval for this event is available)
- ✓ Purpose of the event?
  - Deepening scientific exchange within a larger research network, graduate college or similar
  - Preparation of joint applications (with majority participation of scientists from the UBT)
  - Important goals for research and teaching and/or strategic developmentor
  - Approval of the event by the third-party funding provider or requested and allocated items for project financing from budget funds
- ✓ Existence of a programme for the event which clearly shows the (predominant) focus on scientific/professional exchange
- ✓ Brief justification of the necessity of an event outside the premises of the UBT (the objective and nature of the event must be explained and clearly comprehensible)
- ✓ No air travel
- ✓ Compliance with the 400 km radius
- ✓ Exclusive financing of direct costs for participants (room rental at conference venue, meals, accommodation), i.e. no costs for supporting programme, leisure activities or accompanying persons
- ✓ Compliance with the provisions of the Bavarian Travel Expenses Act (keep travel costs as low as possible)
- ✓ Sections 1 and 3 to 6 of the UBT hospitality guidelines are complied with accordingly.
- ✓ Compliance with public procurement law when commissioning/ordering services in the context of the event
- ✓ Recommendation: Prior consultation with the budget department and the travel expenses department (submission of programme, justification for external venue, planned group of participants, cost calculation, (collective) business trip application)