

Expenses policy – Abridged version

This abridged version of the UKCP expenses policy is intended for use by speakers, panel members and others who carry out occasional duties on behalf of UKCP. The full version is available on request.

The policy applies to all claims for reimbursement of expenses and payment of allowances or fees.

To comply with good practice guidelines from the Charity Commission and the National Council for Voluntary Organisations, and with HMRC regulations relating to the payment of expenses, UKCP has adopted the following policy. There is a mutual responsibility between volunteers and staff to respect the policy and spend UKCP's money wisely.

1. Essential requirements

- a. Claim forms should be submitted **no later than three months** after the meeting/event. Claims received after this period will be referred to the chief executive and may not be reimbursed.
- b. Attention should also be paid to the environmental impact of travel.
- c. Credit card receipts without relevant detailed back-up are not accepted as evidence of expenditure.

2. Reimbursements of travel expenses

Claims for travel booked well in advance of meetings (to obtain cheaper fares) can be paid before the meeting has occurred.

Underground and train tickets

Please retain your travel card or tickets or take a picture of the ticket before travel to submit with your claim. Please ensure the receipt or ticket shows the 'to' and 'from' destinations, the cost of travel and the class of travel. If a ticket is not available, please provide evidence of the cost or a copy of the e-ticket. Copies of an oyster card statement are also acceptable.

If for some reason you cannot get a receipt or ticket and the cost is under £10, it **may** be reimbursed at the discretion of the finance manager. Tube travel paid for with contactless or oyster cards may be claimed at the relevant rates (per the TFL website) providing the date, time and stations are provided.

Parking/speeding fines

Travellers will NOT be reimbursed for any parking fines, speeding tickets or fines resulting from failure to pay the congestion, ULEZ, tolls, Dart charge or similar.

National rail and air fares

The lowest practical fare/rate should be selected within the permitted class of travel.

Standard class should be used unless a clear business case demonstrating value for money can be presented. This may include use of railcards, carrying confidential materials or sensitive equipment, early start times, working while travelling or those who suffer from ill-health or have a disability requiring reasonable adjustments.

First class travel may be booked if the fare is less than or equal to standard class.

In all cases where first class travel is booked, a screenshot of the site clearly showing the comparative standard fares at the time of booking must be included with the claim. Reimbursement for first class travel may not be processed if sufficient evidence is not submitted with the claim (this is at the sole discretion of the chief executive). The provision of a free meal with the train ticket is not sufficient reason to book first class. UKCP reserves the right to limit reimbursement if costs are deemed to be excessive. Please ensure the receipt or ticket shows the 'to' and 'from' destinations, the cost of travel and the class of travel.

Car, motorcycle and bicycle mileage

When it is necessary to travel by car or motorcycle, mileage may be claimed at 55p per mile for car or 24p per mile for motorcycles. Please also see the section below regarding insurance. To encourage greener transport, mileage will be paid at 20p per mile for cyclists. These rates are the approved HMRC Mileage Rates and apply to the first 10,000 of miles travelled each tax year.

Car parking, congestion charges and tolls

Car parking, congestion charges and toll charges necessarily incurred on official business are reimbursable with the relevant receipt.

Note: If an individual chooses to travel by car rather than use public transport for their own personal reasons, they may claim an amount up to the public transport cost that would have applied had early booking occurred. Please contact the UKCP office in advance of travel.

Taxis

In some circumstances, it may be necessary to use a taxi, for example where public transport is not available, where equipment or luggage is being carried to meetings or there have been serious travel delays. Please note that taxi fares will only be reimbursed with a full receipt. Add the reason for taxi use in the 'description' section of your expense claim form.

3. Reimbursement of other expenses

Subsistence expenses

When it is necessary to travel on UKCP business, meals may be claimed to a maximum of:

£10 for breakfast (or the cost of a standard breakfast at the hotel)

£15 for lunch

£35 for an evening meal

Please note that itemised receipts are required; credit card receipts alone are not accepted as evidence of expenditure. Alcoholic drinks may not be claimed (see below for hosting). Snacks up to £10.00 may only be claimed for a replacement for a meal.

Overnight stays

Overnight stays should only be booked:

- where the meeting starts before 9.30am **and** the claimant lives more than three hours away
- if the claimant is attending meetings on two consecutive days
- for reasonable adjustments, for example if a person has a disability/condition
- if using public transport causes significant inconvenience.

The term 'reasonable adjustments' refers to modifications or accommodations that help to ensure that individuals with specific needs are not disproportionately disadvantaged. UKCP will do its best to make sure reasonable adjustments are considered and members of the Senior Management Team will be available to approve such exceptions to the policy.

The cost of accommodation (bed and breakfast) to a maximum budget of £160.00 per night may be claimed. If the cost of accommodation exceeds this budget, authorisation by the UKCP office must be given before the booking is confirmed, or a maximum claim of £160.00 per night submitted. Detailed invoices must be attached to the expense claim in order for costs to be reimbursed.

Other expenses

Claims for postage, stationery or telephone calls, etc should be accompanied by receipts.

4. Making a claim

Expense claim forms can be obtained from the UKCP team and the finance department.

Receipts must be provided wherever possible. **If receipts are not available then appropriate evidence or explanation must be provided, otherwise payment will not be made.**

The UKCP finance department will reimburse all expenses claims within one month of authorisation by the relevant party.

At year end (30 September), all outstanding expenses should be claimed and the forms submitted by **11 October** to facilitate closing the accounts for the year-end audit. Claims received after this date may be rejected.

Please note that the unabridged version of the expenses policy is available on the UKCP website and should be read in full – the above is an abridged version of the full text and does not cover all expenses. The full policy will be applied to all claims.