

Expenses Policy

1. General Policy Statement

In order to undertake the functions and activities for Healthwatch Bedford Borough CIC Bedfordshire (HBBCIC) it is acknowledged that employees, volunteers and Directors will incur travel and other necessary incidental expenses in the course of their work. All such reasonable expenses should be substantiated by receipts (not credit/debit card vouchers) and may be claimed back from the organisation.

2. Purpose and Scope

The purpose of this policy is to enable directors, staff and volunteers who incur travel and other necessary incidental expenses in the course of their work to claim these using HBBCIC`s Expense Claim Form.

This policy also applies Healthwatch participants who participate in working groups.

3. Principles

In making a decision on how to travel; directors, employees and volunteers should have regard to:

- distance to be travelled and location
- the most economical means of travel
- car sharing
- environmental impact
- personal safety
- the availability and use of concessionary, apex and cheap day travel fares

Long distance travel (in excess of 100 miles) should normally be by rail unless location and circumstances demand otherwise.

Employees who use their car for business travel must have a current driving licence and valid insurance to enable them to use their car for business. Similarly directors and volunteers who use their car for voluntary work must have a current driving licence and valid insurance to enable them to use their car for such purposes.

These matters are the responsibility of the individual concerned
Subsistence costs (which includes meals, refreshments and accommodation) while travelling or staying away on business are expenses of travel.

Volunteers and Directors may claim their travel expenses to and from the office and elsewhere in the course of their work for HBBCIC.

4. Mileage Allowances

Directors, employees and volunteers and who need to use their car in the performance of their duties are eligible to receive a mileage allowance for the use of their car while on HBBCIC business. Car sharing is encouraged where possible.

Car Mileage Allowance

- 45 pence per mile for the first 10,000 miles
- 25 pence per mile thereafter.

This total will be calculated from the beginning of each financial year.

Motorcycle mileage

- 24 pence per mile - unlimited mileage.

Bicycle Allowance

- 20 pence per mile - unlimited mileage.

When making a mileage allowance claim the claimant should provide details of the following:

- date of journey
- starting point, intermediary and/or final destination(s)
- purpose of journey
- name(s) of passengers if car sharing
- total mileage to the nearest whole mile (inclusive of any deduction for ordinary commuting if an employee)
- mileage rate
- total cost of mileage claim

Employees may claim the total mileage for journeys made from, and which return to, their usual place of work.

Employees cannot claim for ordinary commuting (travel between home or any other place attended for personal reasons and their usual work place) or for private travel (any other travel that is not business).

If, during the course of their duties, employees travel between their home and an alternative place of work (usually elsewhere within Bedfordshire) at the beginning or end of the day, they should **deduct their ordinary commuting mileage** from the total journey. For business journeys outside of Bedfordshire the employee may claim for the whole journey from, and returning to, their home.

Employees making additional journeys to their ordinary commuting mileage (e.g. evening meetings and weekend events) may claim for their mileage between home and their usual place of work.

5. Car Parking

Reasonable car parking charges associated with HBBCIC business travel or voluntary work may be claimed. Receipts or tickets must be provided with any claim. Parking fines cannot be claimed.

6. Public Transport

Standard class rail and bus fares may be claimed for journeys undertaken while on HBBCIC business or voluntary work. Standard class air fares, comparable with an equivalent rail fare, may be claimed for long distance travel within the United Kingdom. Tickets and receipts must be provided with any claim, along with details of the date, starting point, destination and purpose of the journey.

7. Taxi Fares

Taxi fares may be claimed in certain circumstances (where an employee is not qualified to drive a car) or where public or private transport is not available. Receipts must be provided with any claim, along with details of the date, starting point, destination and purpose.

8. Meals and Refreshments

Reasonable claims for meals and light refreshments may be made while travelling long distance, working away from home, for working lunches or if working away from the organisation's premises for a period of four hours or more when it would be reasonable to expect a meal to be taken. Receipts must be provided with any claim, along with details of the date and the occasion.

If, during the course of their duties, employees travel between their home and an alternative place of work (usually elsewhere within Bedfordshire) at the beginning or end of the day, they should **deduct their ordinary commuting mileage** from the total journey. For business journeys outside of Bedfordshire the employee may claim for the whole journey from, and returning to, their home.

Employees making additional journeys to their ordinary commuting mileage (e.g. evening meetings and weekend events) may claim for their mileage between home and their usual place of work.

9. Accommodation

Claims for overnight accommodation may be made where this is necessary and will generally be approved in advance (e.g. while attending a conference or training event away from home). Claims for newspapers, laundry and other personal expenses cannot be made. Receipts must be provided with any claim, along with details of the date and the occasion.

10. Non-Travel Related Expenses

Claims for non-travel related expenses may be made and receipts must be provided with any claim, which may include:

- Telephone - calls made from home or mobile telephones on behalf of HWCB
A copy of the front page of the telephone bill and the relevant page(s) showing details of the calls made (other personal calls should be redacted) must be provided with any claim.
- Postage - for mail sent on behalf of, or to, HBBCIC.
- Computer and Stationery Supplies - for business use at home by directors and volunteers.

11. Interview Expenses

Candidates attending employee interviews at HBBCIC may claim the cost of their travel to the interview at 45 pence per mile or the cost of local public transport, or a standard class rail fare if travelling long distance. Tickets and receipts must be provided with any claim for public transport. Candidates will be advised of this and provided with an Expense Claim Form at the time they are invited to interview.

12. Making a Claim

Expense claims should be made on the Expense Claim Form, available from the HBBCIC office, together with receipts and tickets as appropriate. Claims should be submitted to the Manager and Company Secretary who will authorise the claim and arrange for payment by BACS.

Expense claims should be made on a regular basis.

13. General

This policy does not form part of an employee's contract of employment. This policy takes account of the HM Revenue and Customs regulations and guidance on the claiming of out of pocket expenses (including mileage allowances) in the course of the organisation's business.

Under HM Revenue and Customs regulations employees are required to keep a record of their travel expenses; such records should be retained for seven years.