

Charity Employees Policy

<<Name of Charity>> ("the Charity")

Policy on employees' expenses

This policy applies to every employee in the course of their work for the Charity is to reimburse all such expenses so that no employee is out of pocket.

The Charity will pay expenses to a Charity Employee in accordance with this Employees Expenses Policy.

[[It is important to the Charity that employees do not wish to receive reimbursement of their expenses; nevertheless wish to claim their expenses from the Charity received.]]

An expense will only be reimbursed if it is incurred by the employee in the course of their duties for the Charity. The amount incurred rather than a flat rate. The expense of the journey concerned will be reimbursed at the applicable rate, current at the time of the expense.

Expenses must be reasonable, and necessary for the Charity's expenses.

This policy sets out how claims for reimbursement and the types of expenses that are reimbursable.

[There is a separate expenses policy for the Charity.]

How to claim expenses

In order to be reimbursed with any expenses, a Charity Employee must claim using the Charity Employees Expenses Claim Form, available from the Charity Secretary/Administrator [from the Charity website].

The Charity will only reimburse expenses if the Charity Employees Expenses Claim Form is correctly completed and submitted to the employee's line manager [Charity Secretary/Administrator].

A claim will only be paid if it is authorised by the Charity Trustees [any trustee] and [the Charity Secretary/Administrator].

[Wherever [reasonably] possible, receipts should be provided, and, where VAT is charged, they should be VAT receipts.]

However, where no receipt is provided, the Charity may in its discretion reimburse the expense.

Unless otherwise agreed by the Charity Trustees, a claim for reimbursement must be made within two months after it is incurred.

How expenses will be reimbursed

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comply with this Employees Expenses Policy.

expenses [but if an employee does not wish to receive reimbursement of their expenses; nevertheless wish to claim their expenses from the Charity received.]

actual expense and it is necessarily the exact amount incurred rather than a flat rate. The expense of the journey concerned will be reimbursed at the applicable rate, current at the time of the expense.

Charity sets maximum limits on the amount of expenses that are reimbursable.

how and when the Charity will reimburse expenses.

[There is a separate expenses policy for the Charity.]

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ing less than £<<e.g. 10>>, the Charity may in its discretion reimburse the expense without any receipt.

em of expense must be claimed within two months after it is incurred.

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Unless the Charity has the employee provide those details on their expenses can be made by the Charity directly in

er to pay their salary) they must reimbursement of expenses can

Payment will be made within [<<e.g. ten, twenty>> weeks] after submission of expenses claim form with receipts attached.

> weeks][<<e.g. ten, twenty>> expenses claim form with receipts

Types of expense claimable

The categories of claimable expenses at the foot of the Charity Employees Expenses Claim Form whether an item claimed is for travel or some other expense (including travel other than by means of own bus, taxi).

at the foot of the Charity es to be completed according to or some other expense (including bus, taxi).

The following notes apply to particular other type of expense as well.

ccurred but the Table also covers

Travel

The expense of any journey is claimed where the employee regularly carries out their work to any other work.

ce where the employee regularly), in order to carry out any of their

Public transport (e.g. bus, train), would be the best value option. Public advance wherever, and as far as, used where reasonably possible. reimbursement of the price of a seat

cal, should be used where that booked off peak and well in ns, offers and discounts should be port may be claimed. No ll be made.

A private vehicle may be used where use of a private vehicle would be permitted if the employee has a full vehicle (not a hired vehicle), the vehicle date MOT certificate.

t available or is impractical or if e of a private vehicle is only , where they are using their own ed and insured and has an up-to-

If and as required by their insurance their vehicle insurance includes bus beforehand of their intention to use

the employee must ensure that r have informed their insurer pose of their work.

Taxis should only be used where practically be made available [(e.g. of day, public transport is not available authority beforehand, use of a taxi [and a trustee][the Charity Secretary/Accessibility needs may agree with Secretary/Administrator] on a general necessary in view of those needs.

means of transport is or can is not available or due to the time not practicable to obtain such by the employee's line manager oyees with mobility or a [trustee][the Charity be used if that will be reasonably

Any single journey or round trip (but more than <<e.g. 100>> miles or trip be authorised by the employee's line Secretary/Administrator]] before a

) on any occasion that will be s of more than £<<e.g. 50>> must ee][the Charity ourney commenced.

[Air Travel

Air travel may only be booked or used journey concerned and its cost is for

any occasion if the particular by the employee's line manager

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and [the Chair of Trustees [and one other trustee] or, if authorised in that way, any such other trustee] or, if approved by the employee's line manager [and one other trustee] [any two trustees]. In no circumstances shall the Charity be other than for economy class.]

<<Add any further restrictions>>

Accommodation

Where, in order to carry out and/or complete any of their work, it is necessary for the employee to be away from home overnight, the Charity will meet the cost of overnight accommodation (with the employee contributing to the cost of any meals and other expenses).

Where possible, the employee should book and pay for the accommodation in advance but if that accommodation booked and paid for by the employee, the Charity will reimburse the cost of that accommodation.

However, no booking for accommodation shall be made without the employee's line manager [and one other trustee] authorising a proposed booking, including the day when it would otherwise be necessary to travel, the location, standard and cost of the accommodation.

In each case, the accommodation claim shall include the nightly charge including breakfast (where applicable) for the UK>>.

Where overnight accommodation is provided, the employee may claim up to <<e.g. £40>> for a meal and refreshment for the accommodation.

Subsistence

If the employee is carrying out any of their work, the Charity will provide [hot and cold] drinks with the employee at the location for the purposes of their work. Where the Charity is unable to provide drinks, the Charity will reimburse the employee for drinks purchased by the employee.

[On any day when the employee is carrying out any of their work on that particular day if that is not their regular place of carrying out their work, and for a period of <<e.g. 4, 5>> hours or the period of work, the Charity will reimburse the employee up to £<<e.g. 5, 10>> per day.]

Telephone and Internet

Charges incurred by an employee in carrying out their work will be reimbursed if the calls concerned are on a mobile or landline bill and a copy of the bill is provided to the Charity. The Charity will reimburse the employee to the extent that their internet use is for work purposes over and above their allowance under their internet provider.

Personal Information

The Charity will only collect the information necessary to process those claims in order to process those claims for statutory accounting reasons.

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to trustees]. If it is not first authorised in that way, any such other trustee] or, if approved by the employee's line manager [and one other trustee] [any two trustees]. In no circumstances shall the Charity be other than for economy class.]

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party. The Charity will only process data in accordance with current data protection regulations. [For further details, see the Charity's Data Protection Policy.]

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General

This policy was approved by the [insert name of Charity's Audit Committee] on <<insert date>>.

[insert name of Charity's Audit Committee] on <<insert date>>.

This policy will be reviewed by the [insert name of Charity's Audit Committee] [at least] [annually][every [two] years].

[insert name of Charity's Audit Committee] [at least] [annually][every [two] years].

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