



EMPLOYEE EXPENSES POLICY

KEY INFORMATION

Policy prepared, reviewed or amended by	James Beardsworth – Corporate Services Manager
Policy approved by Board of Trustees on	18 th September 2024
Policy became operational on	July 2015. Reviewed: 20 November 2018, 18 th September 2024
Next Review Date	The Employee Expenses Policy, and associated guidance and procedures, does not form part of staff contracts of employment and may be reviewed and updated at any time. It will be reviewed no less than every three years, or sooner where there are significant changes to guidance or legislation. Minor updates will be made as required.

1.0 INTRODUCTION

- 1.1** This Employee Expenses policy describes the rules governing staff expenses and claims for reimbursement of expenses, including travel, accommodation and hospitality at Age UK Bolton. It also sets out how our staff are expected to behave in connection with expenses.
- 1.2** This policy should be read alongside other key policies. In particular, users should also read the Charity's Gifts, Hospitality and Anti Bribes policy.

2.0 POLICY STATEMENT

- 2.1** Age UK Bolton understands the importance of appropriate and acceptable dealings with expenses and claims for reimbursement for expenses and owes a duty to their stakeholders to make Employee Expenses policy a priority.

3.0 SCOPE

- 3.1** This policy applies to all permanent and temporary employees at Age UK Bolton or Age UK Bolton Enterprises Limited (which is a wholly owned subsidiary of Age UK Bolton).

4.0 REIMBURSEMENT OF EXPENSES

- 4.1** We will reimburse expenses properly incurred in accordance with this policy. Any attempt to claim expenses fraudulently or otherwise, in breach of this policy, may result in disciplinary procedures being taken.
- 4.2** Expenses will only be reimbursed if they are:
 - 4.2.1** submitted to your line manager on the appropriate claim form within one month of being incurred;
 - 4.2.2** supported by relevant documents (for example, VAT receipts, tickets, and credit or debit card slips); and
 - 4.2.3** authorised in advance where required.
- 4.3** Claims for authorised expenses submitted in accordance with this policy will be paid directly into your bank / building society account.
- 4.4** Any questions about the reimbursement of expenses should be put to your line manager before you incur the relevant costs.

5.0 TRAVEL EXPENSES

- 5.1** We will reimburse the reasonable cost of necessary travel in connection with our business. The most economic means of travel should be chosen if practicable and you

should use existing travel cards or season tickets wherever possible. The following are not treated as travel in connection with our business:

5.1.1 travel between your home and usual place of work;

5.1.2 travel which is mainly for your own purposes; and

5.1.3 travel which, while undertaken on our behalf, is similar or equivalent to travel between your home and your usual place of work.

5.2 Trains. We will reimburse the cost of standard class travel on submission of a receipt with an expenses claim form.

5.3 Taxis. We do not expect you to take a taxi when there is public transport available, unless it is cost effective due to a significant saving of journey time or the number of staff travelling together. A receipt should be obtained for submission with an expense claim form.

5.4 Car

5.4.1 Where it is cost effective for you to use your car for business travel, and you have been authorised to do so, you can claim a mileage allowance on proof of mileage. The current mileage rates can be set at £0.45 a mile. You can also claim for any necessary parking costs, which must be supported by a receipt or the display ticket.

5.4.2 If you are required to drive any motor vehicle in connection with our activities you will, whenever requested, permit us to examine your driving licence and (whenever your own car is used for our purposes) your motor car insurance policy, MOT and current certificate of insurance.

5.5 We will not reimburse penalty fares or fines for parking or driving offences, other than at our discretion in exceptional circumstances.

6.0 ACCOMMODATION AND OVERNIGHT EXPENSES

6.1 If you are required to stay away overnight in the course of your duties, you should discuss accommodation arrangements with the Chief Executive in advance.

6.2 We will reimburse your reasonable out-of-pocket expenses for overnight stays, provided that a budget has been agreed with the Chief Executive in advance of travelling and they are supported by receipts.

7.0 ENTERTAINING VOLUNTEERS, CLIENTS AND PARTNERS

- 7.1 You may entertain actual or prospective volunteers or partners or clients only where your proposal and an appropriate budget has been agreed in writing, in advance, with your line manager or the Chief Executive. Receipts must be submitted in full with your expenses claim.
- 7.2 You must also ensure that the provision of any such hospitality in the circumstances complies with our Anti-Corruption and Bribery Policy.

8.0 BREACH OF POLICY

- 8.1 Knowingly breaching this Employee Expenses policy is a serious matter. Employees who do so may be subject to disciplinary action.

EMPLOYEE CONSENT STATEMENT

I (name of employee) hereby confirm that I have read, understood and will comply with the attached Age UK Bolton Employee Staff Expenses policy.

Signed.....

Date