

**Revised: June 2023**

## **TRAVEL AND EXPENSES POLICY**

### **PURPOSE**

This policy outlines the key principles and rules relating to travel and expenses. It describes the responsibilities of our staff and volunteers ensuring that the money Age UK Cambridgeshire & Peterborough (AUKCAP) spends on travel and expenses is both necessary and reasonable.

### **SCOPE**

This policy sets out your obligations when travelling for work or for volunteering purposes and clarifies how and when mileage and travel expenses can be claimed. All staff and volunteers are responsible for understanding and adhering to the principles of the policy. Commitment to this policy will allow AUKCAP to make the best use of charitable funds.

### **POLICY**

Summary of the key principles we must commit to when travelling:

- Essential travel only, examples are; to deliver frontline services, attendance at events, fundraising activities, onboarding a new staff or volunteer member. Wellbeing or support meetings and 121's can be arranged face to face, good judgement must be used when arranging travel.
- Internal meetings should be held virtually when practically possible including meetings with external partners.
- Internal training courses should be completed online where applicable.
- Non-essential travel should be discussed and agreed with your line manager.

### **MILEAGE ALLOWANCE**

Mileage allowance is paid when employees are required to travel on AUKCAP business using their own personal vehicle. The following principles apply:

- It may be claimed by completing a Mileage Form which should be submitted at the end of each month to your line manager for authorisation before passing onto the payroll department (We will not accept claims for more than two calendar months unless there is an exceptional circumstance resulting in the delay).
- The driver of the vehicle must hold a current, full, UK Driving Licence.
- If the vehicle is over three years old, it must have a current MOT certificate.
- The vehicle must be adequately insured for business use and have up to date vehicle road tax.

Mileage can be claimed on the following basis:

- **Premises based staff** - Mileage between home and the employee's 'normal place of work'\* should not be claimed – i.e. your 'ordinary commute' to work is not covered. This applies to staff where their contractual place of work is at one of our office premises or a day centre. Those with Hybrid Contracts of Employment may not claim for their usual commute to their office base.
- Mileage between locations where any work is performed can be claimed in its entirety.
- Full mileage may be claimed from and back to home, if a visit is to be made on a day which is not a normal working day, or is outside of normal working hours e.g. evening visit.
- **Community based** staff such as Wardens & Home Support Workers who do not have an office base should claim mileage accrued after their first appointment of the day and any subsequent mileage up to the final appointment of the day.
- **Home based** staff who are formally contracted to work from home can claim mileage incurred when visiting temporary workplaces i.e. when visiting service user homes or one of the offices. However, they will not be able to claim for the first 5 miles or the last 5 miles of the day.

Business mileage claims are for the shortest reasonable route. The RAC Route planner, or AA Route planner can be used to give recommended routes. Claims for excessive mileage will be not be processed without sufficient explanation.

Employees are entitled to claim business travel mileage at the HMRC approved rates [Travel — mileage and fuel rates and allowances - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/topics/business-travel):

<b>Type of vehicle</b>	<b>First 10,000 miles</b>	<b>Above 10,000 miles</b>
Cars and vans	45p	25p
Motorcycles	24p	24p
Bikes	20p	20p

Rates are applicable for petrol, diesel, hybrid and electric cars.

\*In exceptional circumstances, for example where an employee has more than one place of work, determining what constitutes the 'normal place of work' will be by agreement between the organisation and the employee. Each agreement will be made on the merits of each individual circumstance without setting any precedent.

## **OTHER TRAVEL EXPENSES**

Some staff may choose to use public transport to make essential journeys e.g. train or bus. This will be reimbursed in full where the cost of public transport does not exceed the equivalent mileage claim applicable.

Claims for public transport cost should be made via the normal expense claim routes via payroll.

## **EXPENSE CLAIMS**

Expense claims can be made for items purchased to aid staff in conducting their roles.

Expenses should be discussed and authorised with your line manager before purchase is made.

Expense claims should be made for each calendar month at the earliest convenience following a month end. We will not accept claims for more than two calendar months unless there is an exceptional circumstance resulting in the delay.

Expenses will be monitored, and audits of expense claims will be undertaken to ensure inappropriate claims are not made.

NB. Volunteer mileage and expense claims are covered under a separate policy.

**MONITORING**

This policy will be reviewed every 36 months, or sooner if relevant changes are required

**Travel and Expenses policy approved July 2023 (Date)**

A handwritten signature in black ink that reads "Hazel Williams". The signature is written in a cursive style with a long horizontal stroke at the end.

**Signed by Chair of Trustees**