



Making your retirement work for you.

PATRON: Ken Jarrold CBE

Travel and Expenses Claims Policy

1. SCOPE OF POLICY

This policy is for NHS Retirement Fellowship Trustees, National Council members and employed staff. The policy and allowances are based on allowances paid by NHS Authorities.

The purpose of expenses claims is to reimburse individuals for any mileage expenses, subsistence related expenses or other purchases / expenses, which have been incurred as a result of carrying out duties or activities on behalf of the NHSRF.

Trustees, members and staff should interpret this policy within the charitable context of the organisation. Every effort should be made to take advantage of reduced fares through the use of a travel card, buying train tickets in advance, buying single tickets when appropriate and taking advantage of any offer for reduced hotel costs.

First class travel will not be authorised unless it is less expensive than the standard fare.

Taxis should only be used where personal safety is an issue, where there is no other alternative, where shared use is more economical or as authorised by the Chief Executive.

Accurate completion of the claims form ensures that the Fellowship complies with its own standards of probity and demonstrates compliance with the requirements of the Charity Commission.

Claims for travel, subsistence and other expenses will only be reimbursed upon submission of a completed claim form with the appropriate receipts.

2. PRINCIPLES

Trustees, National Council members and staff who are required to travel on official journeys are entitled to receive travelling expenses and any associated subsistence allowances. Individuals are also entitled to claim for other authorised expenditure incurred on Fellowship business.

Queries relating to all expenses should initially be made to Central Office.

There is no liability to pay tax on the mileage allowances payable by the NHS Retirement Fellowship.

3. MILEAGE AND TRAVEL ALLOWANCES

From 1 April 2019, the mileage rate payable is 45p per mile.

The NHSRF provides reimbursement for passengers, also on Fellowship business, at the rate of 5 pence per mile per passenger.

It is recommended that all employed staff who use their own vehicle for business travel, check the position with their insurance provider.

Where public transport is used or parking charges are incurred, receipts must be submitted and these will be reimbursed in full.

4. RATES OF SUBSISTENCE ALLOWANCE

When Trustees, National Council members or staff need to stay overnight in a hotel, guesthouse or other commercial accommodation, the receipted overnight costs will be reimbursed in full, up to a maximum of £75 per night for overnight stays (£100 per night for overnight stays in London). The Civil Service Club in London, Premier Inn Travelodge and other similar hotel chains are recommended.

The following meals allowance can also be claimed: -

Lunch Allowance up to £5.00

Evening Meal Allowance up to £15.00

All claims for subsistence allowances must be supported by receipts. Where, exceptionally, expenditure in excess of £75.00 per night (£100 in London) is necessarily incurred, then actual expenditure, supported by receipts, will be reimbursed subject to the approval of the Chief Executive.

5. OTHER EXPENSES

Claims for expenditure such as postage, stationery, photocopying and printing ink should be supported by receipts and will be reimbursed in full.

Fellowship staff, other than those at Central Office, may claim £10 per month for telephone charges. Trustees and National Council members may claim for telephone calls where additional costs are incurred. Claims must be supported by a landline and /or mobile bill.

Claims for the costs of equipment should be authorised, in advance of purchase, by the Chief Executive; this would include the purchase of items such as IT, AV or promotional equipment.

Forms must be signed by the claimant to confirm that the claims are in connection with Fellowship business and the expenses have been incurred necessarily. Any queries about claims must be made to the Chief Executive.

6. GUIDANCE NOTES TO POLICY

A. EXPENSES CLAIM FORMS

White	Central Office budget
Mauve	Scottish development budget
Green	Welsh development Budget

There are separate claim forms for photography and special projects

Trustees' expenses associated with their role as a trustee and for attendance at Trustee Board meetings, should be entered on a white claim form .

National Council members' expenses for attendance at National Council meetings and the AGM should be entered on the white claim form.

Regional / Country Representatives attending their own regional / country meetings and events should claim against the appropriate development budget (see above).

Staff expenses should be claimed on the appropriate form. Expenses for attendance at national meetings and staff meetings should be made against the Central Office budget.

All expenses claim forms should be sent to Central Office by the 7th of the month for authorisation and payment by bank transfer. Receipts should be attached to the claim form with a paperclip and claimants are asked to start a new line for each item. Receipts are not required for travel paid by contactless card on London Underground.

Mileages can be determined by trip or milometer readings or through an on-line route planner e.g. www.viamichelin.com, www.theaa.com or Google maps

B. PAYMENT OF EXPENSES

All claims should be sent to Central Office by the 7th of the month; every effort is made to process claims as speedily as possible. Claims received after the 7th will be processed in the following month. Expenses will be reimbursed by bank transfer. Trustees, National Council members and staff are requested to submit claims on a monthly basis; however expenses amounting to less than £5 will not be processed and should be carried forward and included in a subsequent claim.

Reviewed by Chief Executive date – April 2019

Chairman of the Board of Trustees

Signed

Date

Policy circulated to Staff :

Added to NHSRF website:

Review date : May 2022