



## **Expenses Policy 2015~~4~~**

This policy applies to all volunteer Board Members of Future Years, including elected older people's and voluntary sector representatives. Future Years' policy is to support its members, who should not be out of pocket from participating in Future Years activities, or representing Future Years at meetings or events. Future Years has a responsibility to its funders to ensure that expenditure on travel and other expenses is properly incurred, controlled and represents 'value for money'. If you have a query in relation to a claim, or require further assistance please contact the Chair (telephone 01756 794861) or [ukfy.marshall@gmail.com](mailto:ukfy.marshall@gmail.com)

### **A. Overview**

1. Volunteers (including elected representatives) may claim reimbursement for travel incurred in carrying out duties on behalf of Future Years.
2. The basic principle underlying the payment of all expenses is that Future Years will reimburse reasonable costs incurred while working for the organisation which would not otherwise have been expended.
4. The Chair, or in her absence the Vice-Chair, is responsible for overseeing and authorising the reimbursement of personal expenses.
5. The Chair with support from from Age UK Regional Office will be responsible for processing expense claims
6. Reimbursement can only be made in accordance with this procedure, unless authorised by the Chair.

### **B. Expenses procedure**

Volunteers and Board reps (as defined above) are required to complete an Expenses Claim Form, and attach the relevant receipts(s) or tickets attached. You may obtain a claim form by contacting the Age UK office (0113 2441860). Claim forms should clearly identify the claimant, name and address to whom payment should be sent, date and nature of the expense, travel destinations (where appropriate), and itemised claim details. These should be attached to the Claim Form. Any expense for which a receipt cannot be provided should be brought to the attention of the Chair with an appropriate explanation, for authorisation.

### **Revision of Policy on expenses (Minutes of meeting 6<sup>th</sup> June 2012)**

It was agreed that:

- a) members would be reimbursed the cost of Government consultation documents where the Executive had agreed that task groups should respond to a particular Government consultation.
- b) members may claim up to a maximum of £~~530~~ per year towards costs of printer ink cartridges.

In both cases appropriate receipts must be submitted.

### **C. Rates of reimbursement for expenses**

Future Years is responsible for ensuring that the funding available enables as many members as possible to pursue the work of the Forum

The rates set out below are those agreed as acceptable by Future Years, and in accordance with the points set out above, may only be varied with the approval of the lead body. Volunteers are required to use their discretion and seek the most appropriate and reasonable available option. Volunteers, and Board reps (as defined above) are encouraged to use public transport (standard class), including free services wherever practical. Where possible, bus passes and senior rail cards should be used. Tickets or receipts must be kept.

Travel by car is acceptable where no public transport is available or where the use of public transport would be difficult for reasons of health or disability or not cost-effective. ~~For example, where there is no appropriate public transport for the route. If the claimant travels by car and the cost of standard class travel to be claimed is less than the cost of mileage, then the cost of the public transport should be claimed and not the mileage allowance.~~

Future Years will also reimburse costs incidental to travel by private vehicle such as parking, road or bridge tolls.

However, please check with the Chair in advance as free car parking may be available.

Taxis should only be taken in very exceptional circumstances, where no public transport is available or where the use of public transport would be difficult or not cost-effective. Travel by taxi may also be acceptable where public transport, for reasons of health or disability, is an unsuitable form of transport. Justification for the use of taxis should always be provided on claim forms.

Mileage rates for using own transport.

- cars and vans (regardless of cylinder capacity) ~~450~~p
- motorcycles 24p
- bicycles 20p
- passengers\* 5p

\* This is paid to the driver for each colleague carried on the same business trip to encourage car sharing.

#### **Hotels**

Where a member needs to stay overnight the amount reimbursed for hotel accommodation will be a maximum of £100 per night.

### **Subsistence**

If you are away from home on Future Years business during mealtimes Future Years will pay for subsistence up to a maximum of £5 for lunch and £20 for an evening meal. This will be paid upon production of receipts.

### **D. Expense advances**

Any request for advance reimbursement must be accompanied by an official claim form, passed to the Development Officer and authorised by the Chair. All claims should explain the reasoning behind both the request for expenses, and the amount requested.

### **E. Time limitations**

Claims for the reimbursement of expenses must be submitted before the end of the month following the one in which the expenses were incurred. Exceptions to this may only be made with the authorisation of the Chair. All legitimate claims for reimbursement will be honoured in the next monthly payment run.

### **F. Method of reimbursement**

Expenses will generally be paid by cheque or electronic transfer.

### **G. Disputes regarding reimbursement of expenses**

Any grievances regarding these rules and procedures should in the first instance be taken up with the Chair.