



<b>POLICY INFORMATION (Policy FR011)</b>	
<b>Subject</b>	<b>Expenses Policy</b> <i>(This policy is non-contractual and is subject to periodic review and will be amended according to service development needs).</i>
<b>Applicable to</b>	All staff of Nottinghamshire Hospice
<b>Target Audience</b>	Others such as agents, consultants and other representatives of Nottinghamshire Hospice may be required to comply with the policy as a condition of appointment.
<b>Date issued</b>	30 July 2024
<b>Next review date</b>	30 July 2027
<b>Lead responsible for Policy</b>	Director of Finance and Resources
<b>Policy written by</b>	Director of Finance and Resources
<b>Notified to (when)</b>	Senior Leadership Team (May 2024)
<b>Authorised by (when)</b>	Strategic and Corporate Governance Committee (30 July 2024)
<b>CQC Standard if applicable</b>	
<b>Links to other Hospice Policies</b>	
<b>Links to external policies</b>	
<b>Summary</b>	The policy outlines which expenses claims are permitted, how they may be claimed and what is excluded.
<b>This policy replaces</b>	N/A

<b>VERSION CONTROL</b>		
<b>Status</b>	<b>Date</b>	<b>Review date</b>
Original policy written by Chief Executive Officer	Dec 2022	
Policy reviewed by Director of Finance and Resources	Jun 2024	
Policy notified to Strategy and Corporate Governance Committee	30 Jul 2024	
Policy ratified by Strategy and Corporate Governance Committee	30 Jul 2024	30 Jul 2027
Updated control sheet and published on website	Aug 2024	

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<p><b>1.</b></p>	<p><b>Introduction</b></p> <p>Nottinghamshire Hospice requires staff to travel for work and related activities. It is important for financial, legal and environmental reasons that we provide clear policy and procedures around this.</p> <p>Mileage and subsistence rates will be paid to reflect the rates set out by HMRC.</p> <p>The policy focus is to ensure that staff are reimbursed, the shortest journey is taken if possible, public transport is encouraged and there is a clear process to follow for all staff.</p> <p>This promotes reduced carbon-based emissions and economic efficiency.</p>
<p><b>2.</b></p>	<p><b>Policy Aims</b></p> <p>The policy ensures members of staff act reasonably when incurring expenses and achieve value for money.</p> <p>Expense claims should contain a self-declaration that the claim is accurate and incurred in connection with the business of the charity.</p>
<p><b>3.</b></p>	<p><b>Scope</b></p> <p>This policy applies to all members of staff who work under a contract of employment with Nottinghamshire Hospice.</p>
<p><b>4.</b></p>	<p><b>Responsibilities</b></p> <p><b>Chief Executive Officer</b></p> <p>Has overall responsibility for the implementation of this policy</p> <p><b>Director of Finance and Resources</b></p> <p>Has responsibility for ensuring that there are sufficient resources and structures in place to support this policy and procedures.</p> <p><b>Leadership Team</b></p> <p>Has responsibility to ensure this policy is implemented.</p>

	<p><b>Staff</b></p> <p>Must follow the processes laid out in this document. They are responsible for the integrity of their expenses claims and for submitting them within the agreed timescales.</p>
<p><b>5.</b></p>	<p><b>General Principles</b></p> <p>When incurring business expenses, as defined in the sections below, it is not necessary for staff members to obtain approval from SLT in advance of incurring the expense.</p> <p>Provided that the most economical type of travel and accommodation is used, and meal allowance limits are observed, all expenses reasonably incurred while on Nottinghamshire Hospice business will be reimbursed. All staff must seek value for money through obtaining best prices for accommodation and travel (e.g. by using advance booking and restricted travel times where appropriate for rail travel). Claims must be supported by detailed receipts unless specified.</p> <p>For any expenditure, incurred on behalf of Nottinghamshire Hospice that does not fall within the normal definition of a business expense, Nottinghamshire Hospice procurement policy applies, and it is imperative that approval is obtained from SLT where appropriate in advance of incurring the expenditure.</p>
<p><b>6.</b></p>	<p><b>Train Travel</b></p> <p>Train travel should always be in standard class unless there are exceptional circumstances that warrant first class travel. Prior approval from SLT should be sought for First Class travel.</p>
<p><b>7.</b></p>	<p><b>Air Travel</b></p> <p>If it is more cost efficient to do so, air travel may be considered. Prior approval from SLT should be sought. Budget airlines should be used in preference to full-fare airlines where there is a choice of carriers.</p>

<p><b>8.</b></p>	<p><b>Travel by Car</b></p> <p>Where it is more economical than alternative means of travel, cars may be hired. Full insurance cover should be purchased at the time of hiring the car.</p> <p>If an employee uses their own vehicle, the mileage claimed need not be receipted. However, evidence should be provided of the distance travelled (postcode of journey start and end point). The first 10 miles of any return journey should be excluded as this would be considered a reasonable commute. Car mileage for business use is paid at 45p per mile for the first 10,000 miles in a financial year and 25p per mile thereafter. The mileage rates are the HMRC approved rates.</p> <p>All employees who drive with fellow team members as passengers for the same business can claim for an additional 5p per mile tax-free for each qualifying passenger.</p> <p>All employees who use their vehicle on Nottinghamshire Hospice business must be appropriately insured for business purposes. It is the responsibility of the employee to ensure this. Employees are asked to consider alternative travel arrangements (such as rail) for long journeys as this may prove safer, cheaper and allow continued working.</p> <p><b>Car parking costs</b></p> <p>Car parking costs incurred for work duties can be reclaimed on submission of a valid receipt.</p> <p>Parking fines or penalties will not be reimbursed unless there are exceptional circumstances to which board approval must be sought. Under no circumstances will speeding or any other form of traffic violation penalty or fine be reimbursed.</p>
<p><b>9.</b></p>	<p><b>Taxi Travel</b></p> <p>Where it is in the interest of business efficiency or value for money (i.e. groups travelling together) taxis may be used and the fares claimed. Claims</p>

	must be supported by receipts.
<b>10. Meals</b>	<p>When meals are not included in the cost of accommodation or if you are on business travel that means that you will not return home before 9pm, you will be reimbursed for cost of an evening meal, up to a maximum of £20, including beverages (excluding alcoholic beverages). Claims must be supported by detailed receipts.</p> <p>Meal allowances represent a limit rather than a suggested level of expenditure and they should be applied individually to each meal rather than aggregated to pay for one more expensive meal.</p> <p>Where a hotel booking includes breakfast, lunch or dinner as part of the agreed rate, staff should not claim for meals additionally.</p>
<b>11. Accommodation</b>	<p>The most cost-effective rate should be obtained and ideally not exceed an upper limit of £135 unless exceptional circumstances can be demonstrated.</p> <p>As with meal allowances, the amounts described above are intended to be upper limits rather than a suggested level of expenditure. Therefore, if it is possible to book appropriate accommodation at a lesser amount, then this ought to be done.</p>
<b>12. Telephone Calls/data</b>	<p>Nottinghamshire Hospice will provide employees with a mobile phone if they are required to make or receive significant numbers of calls for the purpose of carrying out work for the charity. In exceptional circumstances employees who need to make work-related calls using a personal phone may claim the cost of those calls. In addition, payment for data usage will only be made in exceptional circumstances and with authority of the CEO or Director of Finance &amp; Resources. The claim will need to be submitted with evidence such as an itemised bill.</p>

	<p>Mobile phones are for handheld use in safe situations. Nottinghamshire Hospice employees should not use their mobile phone whilst driving or in any other unsafe situation. Nottinghamshire Hospice will not accept responsibility for any damage or injury caused by an employee using a mobile phone in an unsafe manner.</p>
<p><b>13. Claims</b></p>	<p>Claims should be submitted to your Line Manager as soon as possible after they are incurred and no later than one month, with receipts attached, for approval. Expense claims contain a self-declaration that the claim is accurate and incurred in connection with the business of the charity.</p> <p>It is the responsibility of the Director of Finance and Resources to ensure that all items claimed are legitimate and supported by a receipt. If a receipt cannot be provided for an otherwise legitimate expense, this should be highlighted, and it is then at the discretion of the Director of Finance and Resources whether that item is approved for payment. (Appendix 1)</p>
<p><b>14. Payment of Claims</b></p>	<p>Expense claims will be paid through monthly payroll in arrears. The claim should be signed appropriately, accompanied by receipts and submitted to the Finance Department for payment.</p> <p>Claims need to be received by the 15<sup>th</sup> of each month for inclusion in the next monthly pay run.</p> <p>Expense claims are exempt from PAYE, NI and Pension payments and will show separately on individual pay slips.</p> <p>It is recognised that for some staff members incurring work-related expenses can cause financial hardship. In this situation, an out of cycle payment can be arranged, this will be made via direct bank transfer to the individual's nominated bank account.</p> <p>Payments will be agreed at the discretion of the staff members Manager, HR or Director of Finance &amp; Resources.</p>



<b>15.</b>	<b>Monitoring</b>  The Director of Finance and Resources and Treasurer are responsible for monitoring application of the business expenses policy to ensure compliance. False claims or claims for personal gain constitute gross misconduct and will lead to the disciplinary procedure resulting in dismissal.
<b>16.</b>	<b>Equality Impact Assessment (EIA)</b>  An EIA has been completed.

