



<b>Policy name</b>	<b>Expenses Policy</b>
<b>Operational from</b>	05/03/2021
<b>Next review date</b>	05/03/2022
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<b>Associated policies</b>	Privacy Policy Safeguarding Policy
<b>Privacy</b>	External

## **NSUN**

### **Expenses Policy – Trustees, Staff, Associates, Members and Volunteers**

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#### **1. Purpose**

The purpose of this policy is to set out the criteria by which all NSUN Trustees, Staff, Associates, Members and Volunteers can claim out-of-pocket expenses. NSUN values the contribution of all of these groups and no-one should feel they cannot take part, or be left out of pocket, for contributing to the work of the charity.

This policy only covers reimbursement of out-of-pocket expenses incurred during the normal course of the Charity's business and does not cover payment for services, or participation and involvement payments, which are covered by the Finance Policy.

All expense claims must be authorised in advance – see section 4.

#### **2. Payment of expenses**

It is NSUN's policy to reimburse all expenses directly through the bank (unless otherwise agreed). For most expenses, this will mean reimbursement after the activity has taken place on production of a valid expense claim and receipt.

NSUN is committed to making participation in the work of the charity accessible for all and where receiving expense payments in advance would make this possible, this can be agreed on a case-by-case basis, in advance, by the CEO. Wherever possible, this will mean that NSUN will make the payment on behalf of the claimant. In order to request payment in advance, at least 2 weeks' notice must be given by the claimant.

Expenditure will be reimbursed as soon as possible after the receipt of a valid expense claim, which will normally be within a few days. On rare occasions, it may take up to 2 weeks to reimburse claims.

#### **3. Claiming Expenses**

All expenditure must be claimed using the standard expense form (Appendix 1, or available from the General Manager) and by attaching receipts which support the expenditure. Receipts should show who was paid, the date the expenditure was incurred, and the amount paid. Expense claims received by email will be considered as though signed by the sender.

Expenses must be claimed as soon as possible after they are incurred. Expenditure claimed more than 3 months after the date of the expense may not be paid.

Where receipts have been lost the decision to reimburse the expenditure will be at the discretion of the CEO, who must annotate the expense claim accordingly.

#### **4. Authorisation**

All expense claims should be authorised by the CEO prior to payment (or by the Chair in their absence, the Chair must also authorise the expense claims of the CEO) who is responsible for ensuring all supporting documentation is in place to support the claim.

Expenditure must be agreed with the CEO in advance, in writing (by email where possible) and any expenditure not agreed in advance, may not be reimbursed.

With the support of the General Manager, the CEO may approve specific types of expenditure, within an agreed budget for staff/Trustees, without needing to approve each individual items in advance, such as travel to meetings and stationery. The CEO may also deputise the prior authorisation of expense claims to project managers within an agreed budget.

#### **5. Types of expenditure**

Guidance around specific types of expenditure are shown below. All expenditure must be agreed in advance and may be refused. No expenditure will be reimbursed without a valid receipt.

##### **5.1 Meals**

Expenses for meals will only normally be reimbursed where they are part of an overnight stay. In these instances, an evening meal for the night of the overnight stay, breakfast the following morning and lunch the following day, where the claimant is unable to return home before lunch, may be reimbursed. This must be agreed in advance by the CEO.

In rare circumstances, Trustees, Staff members, Associates or Volunteers may need to purchase a meal other than in conjunction with an overnight stay. This may be approved at the discretion of the CEO but would be due to unusual circumstances

No meals will be reimbursed without a valid receipt and NSUN will not cover the cost of any alcohol purchased with or without a meal. The maximum reimbursement for meals is as follows:

Breakfast £6.00

Lunch £8.00

Dinner £20.00

##### **5.2 Travel**

NSUN will reimburse travel incurred in the course of normal NSUN business. All staff are home-based so travel costs from their home to meetings, events etc will be reimbursed.

Mileage will be reimbursed at the agreed HMRC rate, which for normal single occupancy car travel, is currently 45p per mile. Train and Air travel should be at the cheapest available rate and booked in advance where possible. Taxi travel should be agreed in advance and should not exceed £20.

In making travel decisions due consideration should be made to any NSUN environmental policy in place at the time of booking.

### **5.3 Phone Bills/Internet**

In general, no reimbursement will be made for phone calls or internet costs. NSUN has a business phone system which can be used by Staff, Trustees and Associates to make calls where needed.

Specific situations may be considered on a case-by-case basis.

### **5.4 Other Out-of-pocket expenditure**

Other out-of-pocket expenditure, such as stationery, postage and photocopying may be reimbursed but should be approved in advance by the General Manager and must represent the best value for money for the charity.

### **5.5 Entertaining/Meetings**

When holding work meetings in public spaces such as cafes, staff may be reimbursed for the cost of a soft/hot drink. The number of drinks reimbursed should be proportional to the length of the meeting and as a rule of thumb this should be one drink per 90 minutes. Trustees may also claim the cost of refreshments for NSUN related meetings on the same basis provided this has been agreed in advance with the CEO.

When meeting with external contacts, staff may also claim the cost of the drink for the person/people they are meeting on the same basis. Due consideration should be made to any Bribery Policy in place at the time.

Associates, who are self-employed, would not normally be reimbursed for the cost of any refreshments purchased unless agreed in advance.

### **5.6 Accommodation**

Overnight accommodation should be approved in advance by the CEO. The need will be determined by the time and nature of the event/meeting and travel required.

It's acknowledged that overnight accommodation can be used to enable a person's involvement, both for them and anyone supporting them, see Reasonable Adjustments section 6. Prior agreement should be sought from the CEO.

To ensure the best rates available, all overnight accommodation, once approved will be booked by the General Manager.

## **6. Reasonable Adjustments**

No individual should be disadvantaged from taking part in NSUN activities for any reason and reasonable adjustments will be considered where needed. NSUN will meet all reasonable expenses associated with meeting a claimant's need that would otherwise form a barrier to involvement - see Equal Opps policy (to be reviewed).

The decision to approve reasonable adjustments will be made by the CEO, who will consider all aspects of the claim including whether these costs would normally be supported by other

schemes such as Access for Work, or an individual's social care arrangements. No claim will be paid where it hasn't been approved in advance.

The reimbursement of Carer's and Childcare expenses will only be reimbursed for staff and volunteers when they cover time outside of normal working hours. Costs associated with Trustees will be considered on a case-by-case basis. Costs of this type incurred by Associates will not be reimbursed.

## **7. Review**

This policy will next be reviewed in February 2022.

## Appendix 1



National Survivor  
User Network

## **EXPENSES FORM**

By submitting this form for approval, I confirm that these expenses have been wholly, exclusively and necessarily incurred as part my role with NSUN

Claimant: \_\_\_\_\_ signature: \_\_\_\_\_  
date: \_\_\_\_\_

Authorised by: \_\_\_\_\_ signature: \_\_\_\_\_  
date: \_\_\_\_\_

Please provide your bank details so we can reimburse you directly via BACS: How would you like to be paid?

A/C name:

BACS

Sort code:

**dates**

**Date:** \_\_\_\_\_

Authorised by: \_\_\_\_\_ signature: \_\_\_\_\_  
date: \_\_\_\_\_

Please provide your bank details so we can reimburse you directly via BACS: How would you like to be paid ✓

A/C name: BACS

Sort code: Cheque

A/C number: Cash

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Bank: \_\_\_\_\_

**Please note that reimbursement will be made as soon as possible after expenses have been incurred.  
Please attach all receipts without which reimbursement may not be possible.**

Please keep a copy for your records.