



Expense policy

Policy owner	Dan Petrak
Legislation and regulation	
Formally endorsed by	Board of Trustees
Last update	August 2022
Next review	

1. **Overriding principle**

Personal expenses incurred on behalf of the charity will be only reimbursed to the extent that they represent a marginal cost to the individual. Staff and volunteers are asked to take responsibility for minimising the costs they incur on behalf of the charity, and prior approval to incur the expense should be obtained, unless circumstances deem this impractical.

2. **Personal expense reimbursement procedure**

Expense claims must be authorised by the CEO, or, in the case where the CEO is seeking reimbursement, a trustee.

A valid invoice or other documentary evidence must support every expense claim.

3. **Travel**

Staff and volunteers may be reimbursed for travelling expenses incurred on business journeys to the extent that they are out of pocket by making the journey. Any saving of the usual cost of travelling between home and the normal place of work is to be taken into account. Travel between home and the usual place of work is not a business journey, even if this takes place outside of normal business hours.

Train – staff will be reimbursed for second class travel for business journeys and are expected to make use of discounted fares where practical.

Car – mileage rate as published from time to time. The current rate is 45p a mile. If a business journey starts or ends at a staff member's home the home to office saving must be deducted. **It is imperative that staff using their own cars for the charity's business have insurance cover for business use**, such cover being at the individual's own expense unless there are reasonable mitigating factors.

4. **Away from home**

Hotel & meals – reasonable hotel charges and meals will be reimbursed except for personal items, subject to prior approval from the CEO.

To help reduce the cost of staying away from home the charity will pay £20 a night and £10 for dinner when staying with friends & family.

5. **Fees and professional subscriptions**

The charity does not pay individual subscriptions to professional bodies other than in exceptional circumstances.

6. **Training and conferences**

The cost of room hire, hotel accommodation and meals associated with staff training and conference events is to be charged to conferences.

7. **Authorisers responsibilities**

To ensure that:

- a. The expense is valid and a reasonable charge to the charity.
- b. A valid invoice, or adequate evidence where no invoice is available, is presented supporting every expense.

Note of changes made	Date changes made	Date policy statement approved by the Trustees
Approved by the Trustees		2/11/2020
Approved by the Trustees	03/11/2021	03/11/2021

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