



Charity number 1197599

Expenses Policy for Brereton Big Local CIO

Statement of intent

- Trustee members, staff and volunteers of Brereton Big Local CIO are entitled to claim reasonable expenses incurred, whilst undertaking agreed Brereton Big Local CIO activities.
- We are committed to ensuring that no staff member or volunteer carries out their BBL activities at a financial loss, because of expenses incurred when volunteering and undertaking Trustee duties for BBL, keeping in line with national standards of good practice.
- We are aware staff, members and volunteers undertake activities that involve unpaid time and incur costs. We will reimburse all reasonable expenses incurred through carrying out BBL activities that comply with the following policy and are properly accounted for.

Aim

- This policy aims to clearly indicate which expenses will be reimbursed and the process of how this would occur and encourages staff and volunteers to make claims so that the full cost of BBL activities is established and no one should feel reluctant to claim that which they are fully entitled to.
- This policy covers all BBL Trustee members, staff, and volunteers.

Methods

Before making an expense claim check:

- Were a necessary expense incurred because of undertaking their role as a Brereton Big Local volunteer or employee.
- Are reasonable and were made using the most cost-effective method available.
- Occurred within the last 30 days.
- Are properly recorded as a previously agreed meeting, an activity on the job sheet (including provision to a person in need) or an event or activity previously agreed by the Trustee as part of the Brereton Big Local programme.

Types of expense claims

Public Transport:

- Expenses for travelling on public transport, standard class only, on behalf of BBL can be claimed.
- Where possible, trustees should book tickets as far in advance as possible, making use of concessions, special offers or discounts.
- Where reimbursement is for an item purchased it is expected that efforts will have been made to get it at the best value for money

Taxis

- Brereton Big Local will reimburse the costs of a taxi within the Rugeley area where there is no volunteer driver available.



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Driving private vehicles

- Brereton Big Local will reimburse the cost of travel, using private vehicles, at the following set mileage rates: Journeys should be rounded up to the nearest mile and be checked on Google Maps or similar software.
- Parking costs can be claimed, where necessary.
- Under no circumstance will BBL reimburse the cost of parking fines or speeding tickets
- It is up to volunteers/trustees/staff to ensure that their vehicle insurance policy covers them for the activity claimed for

| Mileage rates: | |
|----------------|--------------|
| Car | 45p per mile |
| Motorcycle | 24p per mile |
| Bicycle | 20p per mile |

Food and Drink

- Where a training course, meeting or extended activity is undertaken BBL will reimburse reasonable costs of food and non-alcoholic drink where these are not provided by the organisers.

Overnight Accommodation

- On any occasion Trustee members/employees are required to stay overnight, the cost of rooms will be reimbursed up to a value in the range of £50 - £200 (location dependent) to be approved by the BBL Chairperson and Treasurer prior to attending (if deemed necessary, referring to the whole Trustee, for further discussion).

Supporter Costs

- We are aware some BBL trustees require additional support to complete some of their duties.
- We will reimburse the cost of subsistence and travel, for support deemed necessary.
- This support will vary depending on an individual's needs, but may include assistance during travel, personal care, a sign language interpreter, translator or a hearing loop.
- The necessary support and a quote of the potential expenses (i.e., travel, subsistence, etc.) will be given to the Chairperson and Treasurer in advance, for approval (if deemed necessary, referring to the whole Trustee, for further discussion).
- BBL will also cover the cost of any equipment required by a member, employee, or volunteer in order to carry out their role.

Administration Costs

- Trustees/employees may incur administration costs undertaking their role, for example, making phone calls, printing, or sending letters on behalf of Brereton Big Local.
- The cost of phone calls, stationery and postage can be reimbursed when supported by receipts and/or an itemised bill.
- The cost of furniture, utilities including gas, electricity, broadband/phone lines will not be reimbursed.



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- The cost of computer equipment will not be reimbursed, except when such computer equipment and/or computer programs are purchased solely to complete Brereton Big Local Trustee member/employee duties.

How expenses are claimed, and reimbursements made:

- Expenses will be claimed by returning the necessary BBL expenses claim form, along with all supporting receipts/documents/reference to the job sheet as proof to the Treasurer.
- BBL aim to process all trustee expense claims, including reimbursement of necessary expenses, within 4 weeks of when the form was received.
- Where the BBL Treasurer or related parties are claiming expenses, their completed form will be checked and signed by the Chair.

Claiming expenses

- To ensure BBL Trustee Trustees/employees/volunteers are not 'out of pocket' we encourage claims for expenses to be made.
- We are aware some Trustees/volunteers/employees would prefer not to claim expenses, however, to enable a true representation of the running costs of BBL including the costs of such volunteers, it is important claims are made and all figures accounted for.
- If, however, you would prefer not to keep the claimed expenses, it gives the opportunity for Trustee members/employees who qualify, to claim gift aid to raise funds for BBL.

