

Alzheimer's Society

Travel and Expenses Policy

Policy and procedure apply to:		Employees: All	Volunteers: All
		Contractors: Please refer to your contact.	Other: Service Users involved in initiatives where the Society has agreed to cover expenses.
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1. What you need to know

We appreciate that our volunteers and employees may incur costs when they are working away from home or the office, or when working in the community.

This policy ensures that we reimburse our people for their reasonable out of pocket costs, whilst making sure that we spend our money effectively. Before incurring any expenses, please familiarise yourself with this policy, and the further details in the **Travel and Expenses Guidance**.

We will be clear about when and how expenses can be claimed. We will promptly reimburse properly authorised, reasonable expenses that are essential to the work of the Society.

We expect you to follow this policy and the **Travel and Expense Guidance**. You should keep travel to a minimum, book trips as far in advance as possible, and consider whether the benefit to be delivered by the trip justifies the costs of making it. Travel should be booked through our approved travel provider where possible.

2. How we work here

We will reimburse eligible expenses where costs have been incurred for essential Society business. Please note your role and location may have an impact on what you are eligible to claim for; check your contract or with your Line Manager (or Role Manager for volunteers) if you are unsure. Before booking any travel or other expenses, you need to get approval from your Line Manager (your Line Manager may need approval from the budget holder, if different).

To claim your expenses, you need to:

- Provide a clear, itemised VAT receipt for all expense claims (except for mileage claims, which do not require a receipt). The receipt should list each item purchased and the cost of the item and be retained until the claim has been paid. For items under £10, where a receipt may not be available, you can submit alternative evidence of expenditure such as a screenshot of credit card line item for a tube fair, a Parking App confirmation or a note confirming the nature and purpose of business expenditure.
- Obtain approval from your Line Manager and/or budget holder for the expenses.
- Submit your approved claim within three months of the expenditure being incurred. Expenses may not be paid if submitted outside this period.

All bookable travel must be booked through our nominated travel provider.

The only exceptions to this are:

- **Train tickets costing less than £20.** These may be booked offline either using a corporate credit card or claimed through expenses.

We expect you to use the principles outlined below when you make arrangements for travel or other expenditure. Then read the **Travel and Expenses Guidance for Employees and Volunteers** document, which gives you the latest details on what you can and can't claim. Please note these will vary over time (e.g. mileage rates) and as such you should ensure you have checked the most recent guidance before submitting a claim.

General Principles

- We recognise that this policy cannot cover every eventuality. The Policy Owner may provide approval for exceptions in unforeseen circumstances. Any exceptions must also comply with our other policies.
- Employees and volunteers can only claim their own expenses (for example, they cannot claim on behalf of a Service User), unless arranged with their Line/Role manager (e.g. volunteers who cannot access the online expenses system).
- In group situations (e.g., when multiple team members are buying lunch or using a taxi), one person should pay on everyone's behalf, then claim for the whole amount, rather than individual claims being made.

Travel

In general, if you are on a **home-based or community-based contract or are a volunteer** all travel expenses incurred on Society business will be claimable (as long as this is occasional and does not constitute a regular pattern of travel in line with [HMRC rules](#)).

However, for regionally based roles (such as community-based roles), you are **only eligible to claim travel** from the geographical boundary of your role, not from your home address. This is a HMRC requirement. Similarly for certain volunteering opportunities, your home address may be outside the geographical scope of your role and your Line Manager will confirm where this applies to you. Your Line Manager may approve occasional claimable travel outside the boundary of your role (e.g. travelling to a meeting in London).

If you are an **office worker or hybrid worker**, you are not able to claim travel for your normal commute i.e. travel to your normal place(s) of work, including your normal office(s).

See the Travel and Expenses Guidance for Employees and Volunteers, linked to this policy, for further details.

Public transport: you should use public transport wherever this is cost effective and practical. If there is no public transport for all or part of your journey, or it's not feasible to use public transport, you can use your own vehicle, subject to approval from your Line Manager (and budget holder if different) providing you meet the below criteria.

Train: You should book your tickets as far in advance as possible, via our chosen travel provider. Electronic tickets should be chosen where these are available.

Buses and London Underground / Overground: The most cost-effective way to travel in London is to use an existing Oyster card or to touch in and out using a contactless card.

Season ticket loans: We won't pay for season tickets, but some employees will be eligible for a season ticket loan for bus or train travel. See the guidance document for full details.

Car Mileage:

You must ensure that the claim relates to valid business travel in line with our policy and guidance. There are a number of requirements that you have to confirm with your line manager before you can drive on Society business. See the details in the Travel and Expenses policy.

These include having:

- sufficient insurance cover;
- a valid driving licence;
- a valid MOT in place.

Whether you are an employee or a volunteer you must advise your insurance company that you will be using your car in the course of your activities. You must not drive on Society business without having notified your insurance provider. Please refer to the 'Driving on Society Business' documents for further information.

We will pay for mileage claims that are incurred entirely for your work or volunteering activities. Receipts are not required for mileage claims, but your Line/Role Manager will need to approve your claim.

We will not pay for any fines (e.g. parking or driving related fines), even when incurred on Society business.

London link allowance:

If you are a home worker who is paid the London Link Allowance (a legacy allowance that is no longer offered), you are not entitled to claim for journeys from your home to your linked office in London. Please see our Pay Policy and guidance if you would prefer to opt out of this allowance to enable you to claim travel.

Bridge, road and tunnel tolls and congestion / clean air zone charges: we will pay for these charges, if your travel is claimable (i.e., if these are part of your normal home to office commute, we will not reimburse you).

Parking: you should try to minimise parking costs by finding suitable places to park free of charge where safe and practical. Parking claims must be accompanied by receipts showing the price and the time and date of payment.

Hire cars: for some journeys, it might be more cost-effective to hire a vehicle. For example, when making a trip over 100 miles, it is usually cost effective to use a hire car. You need to obtain approval from the appropriate Line Manager (and budget holder if different) in advance of hiring a vehicle. You can book it through our appointed travel booking agency.

Taxis: taxi travel is generally expensive and should be minimised. Your claim may be rejected if your Line Manager does not consider the justification for your journey to be reasonable. When

booking taxis in advance for Society specific reasons please request a quotation from our appointed travel booking agency.

International Travel: you need approval from the appropriate Line Manager (and budget holder if different) before booking any air or ferry journeys. Flights should be booked via our appointed travel booking agency and travellers on business are covered by the Society's corporate travel insurance. Read the International Travel Guidance document on Arena before planning your trip. Passport renewals and personal travel insurance cannot be claimed.

Accommodation

You should make every effort to avoid overnight stays. If an overnight stay is unavoidable, you should book accommodation as early as possible, and you must use the Society's appointed agency.

In general, the travel provider will book hotel rooms that can be cancelled. If you are confident that you will not need to cancel your room, it may be more cost effective to request a non-refundable room.

Where a traveller has specific medical requirements that make the Society's preferred hotel unsuitable (for example where a traveller with dementia requires specific assistance) it may be necessary to breach the maximum permissible rate for them and their companion. Such examples should be approved in advance by the Travel and Expenses Policy Owner.

Friends and Family: If you choose to stay with friends or family in lieu of staying in a hotel you may claim up to £15 per stay for a gift (e.g. flowers, chocolates, a contribution to a meal or a bottle of wine). This amount can be claimed through the normal expenses process. This allowance will only be claimable if it was agreed by your Line Manager that the trip required an overnight stay.

Subsistence

We will reimburse subsistence costs in certain circumstances, for example:

- **Refreshments:** if you are required to meet a volunteer, employee or person affected by dementia in an off-site location.
- **Meals:** when traveling for Society business. See the guidance document for further details.

Gifts and Hospitality

The provision and acceptance of Gifts and Hospitality is covered by our Anti-bribery and Corruption Policy and Gifts and Hospitality Guidance. There are very limited circumstances in which gifts or hospitality expenses can be reclaimed. Refer to the Anti-bribery policy for the full details.

Corporate Credit Cards

These are a convenient way of paying for low value or unusual costs. If you hold a card and use it to cover expenses incurred on Society business, please ensure you follow this policy and its accompanying guidance notes.

Subscriptions

We will pay for personal subscriptions to professional bodies and associations where membership is required by the Society or where it is specified on the job description.

Flu Vaccination

People who use the Society's services may be more vulnerable to infections from the common cold or influenza. Employees and volunteers in direct contact with service users are encouraged to have an annual flu vaccination which can be reimbursed through expenses if they do not already qualify for a free vaccination.

Eye Tests and Glasses for DSE Use

Employees who are users of display screen equipment are entitled to be provided with a sight test at the employer's cost. See the [Reimbursement of DSE Sight Tests and Glasses](#) guidance on Arena for details of how to make an expense claim for a sight test for DSE use.

3. What to do if things go wrong

Your **Line Manager and/or budget holder** is responsible for ensuring the policy is adhered to and will check and authorise all eligible claims in a timely manner.

The Policy Owner will review and accept or reject any variations to the policy.

All incidents of fraud and suspected fraud must be reported to the Society's Nominated Fraud Officer in accordance with the Society Counter Fraud and Theft policy and Fraud Reporting Procedure. We will treat any abuse of this policy and/or submission of fraudulent or dishonest claims seriously. We will take disciplinary action against any employees in these circumstances. You can find more information in our Disciplinary policy.

4. Further information

If you need more information about this policy or need support in using it, please contact the Policy Owner or your Line Manager.

5. Supporting documents

[Travel and Expenses Guidance for Employees and Volunteers](#)

[Travel and Expenses Line Manager Guidance](#)

See Finance page on Arena for details on how to claim

[Home working equipment claim form](#)

[Driving on Society Business](#)

6. Definitions

Appointed Travel Agency- this is the Society's chosen travel provider. Please see How to Book Travel [Arena page](#) for the current provider, more information and access to the booking portal, and how to contact them if things go wrong.

Document details

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