

Fibromyalgia Association UK

Volunteer Travel and Expenses policy

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Section 1 - Introduction

The principle in relation to expenses is that as a charity, the association is reliant on the support it receives from volunteers, who should be neither out of pocket nor enjoy any financial gain when working voluntarily on association-related activity.

Volunteers should be able to satisfy themselves that they could justify to a fellow volunteer any claim they make for payment of expenses, if challenged.

As the association is a small charity, it is not appropriate to provide the more generous amounts of allowances for expenses that sometimes are available in business. It is expected that Volunteers should keep their expense claims to a minimum (without being out of pocket) and where possible and appropriate, funding for expenses should be sought from other sources. This could be from specific grants or from a local support group.

The association has a responsibility to ensure that expenditure on travel and subsistence is properly incurred, controlled and represents 'value for money'. The

guidance below applies to volunteers attending meetings of the association (i.e. Trustee and Regional Coordinator meetings), other meetings attended by volunteers in an official capacity on behalf of the association and other costs incurred in carrying out volunteer work on behalf of the association.

1.1 Meeting Expenses

For the avoidance of doubt, this policy does not apply to leaders or members of Support Groups attending regional or national support group meetings. At present, FMA UK is not in a position to reimburse support group leaders for their expenses to attend the annual Group Leaders' meeting.

FMA UK has and will continue to attempt to find funding for all attendees of meetings such as the group leaders meeting but this has not been forthcoming from the sources we have tried so far.

The trustees of FMA UK realise that it may be difficult for RCs to attend the meeting if they are not attached to a group or their group is unable to fund them as a leader or member of their group. FMA UK asks RCs to attempt to gain local funding from their region, but if this is not successful, FMA UK will reimburse their costs in line with the association's expenses policy. In this situation pre approval for expenses would be required.

1.2 Financial situation

As sponsorship is attained, or the charity's income changes then the board will review the level of expenses in line with this. It is our intention to have an annual group leaders' meeting that is fully subsidised when funds allow this, but until then we have to ask groups to cover their own expenses for these meetings.

If you have a query in relation to a claim, or require further guidance or assistance please contact our office by phone on 01384 895 002, or by e-mail at head.office@fmauk.org.

Section 2 – Travel

2.1 Rail Travel

You are entitled to travel standard class on the association's business.

Advantage should be taken of concessionary fares, cheap day tickets, and rail card options where appropriate.

2.2 Air Travel

Air travel on the association's business will be rare. Where it is needed, the association will reimburse the cost of the appropriate economy class fare. However, any air travel must be approved in advance by the Board of Trustees. Application for such approval should be made to the Head Office for review by the Treasurer or board.

2.3 Mileage

Travel by car is acceptable where it is more efficient and economical than the use of public transport. For example, where there is no appropriate public transport for the

route; where there are significant files / equipment to be transported; or where there are time and cost savings involved.

Where a private car is used for association business, you should be certain that your car is covered for 'permitted use' within the terms of your insurance policy. No charge should be made to the association for any additional cost in respect of 'permitted use' on private insurance cover. The current private car mileage rates are:

For each tax year (6th April to 5th April)

	First 10,000 business miles	Each business mile over 10,000
Cars (&Vans)	40p	25p
Motor Cycles	24p	24p

It is very unlikely that you will travel over 10,000 miles on behalf of the association. Mileage claimed from other employments and other organisations is not relevant for the application of this limit. Limits will be reviewed on a regular basis and adjusted in line with the HM Revenue and Customs guidance.

2.4 Public Transport

Please travel by tube or bus wherever practical, particularly for short journeys.

Where it is impractical to use a tube or bus, for example, because of heavy luggage, a taxi may be used. However, please avoid any additional charges, such as pre-booking or waiting time, wherever possible.

Please do not use taxis for long distance travel, except where the cost of such a journey is less than the cost of travel plus the cost of overnight accommodation that would have been required.

Section 3 – Subsistence & Overnight Accommodation

3.1 Overnight Accommodation

Where possible you should travel on the day of your meeting or business without incurring overnight accommodation. If you need to stay overnight when away from home on the association's business this should be agreed beforehand with the treasurer or the board. You may claim reimbursement of actual expenditure incurred on the accommodation up to a maximum amount that the bed and breakfast would cost at the nearest Innkeeper's Lodge inclusive of VAT. A guide rate at the time of this policy is £55 per night but please check the relevant Innkeepers lodge.

If there is no local Innkeeper's Lodge to set the amount you can claim then the maximum amount will be based on the cost of a similar quality of accommodation in the area.

If the circumstances mean that you have no choice but to pay for more expensive accommodation, then these costs need prior approval of the Board of Trustees. Application for such approval should be made to the Head Office for review by the treasurer or the board.

In the interests of economy, do please exercise discretion when seeking overnight accommodation when on the association's business. Please also provide full details of the reason for claiming overnight accommodation on your expense claim form.

3.2 Subsistence

Breakfast

The cost of breakfast at a hotel can be claimed only when staying away from home overnight on association business. Receipts should support expense claims.

Lunch

When attending association meetings, whether at the Stourbridge office or at other venues, lunch will normally be provided. Accordingly no additional expense will be incurred by volunteers.

If lunch is required while on the association's business then an amount of up to **£5** can be claimed towards the cost of lunch. Receipts will be needed to support expense claims.

Dinner

Where an overnight stay is required on authorised charity business, a contribution to a meal will be provided to a maximum of **£5**. Receipts will be needed to support expense claims even if they are below the contribution limit.

The host of any FMA UK meetings may claim the dinner contribution at the discretion of the trustees even though the host does not have an overnight stay.

Section 4 - Other Expenditure

The association will also reimburse the actual costs of postage, telephone calls and other incidental reasonable business expenses which you necessarily incur as part of your duties as a volunteer. Please provide full details on your expense claim form, supported by receipts, where appropriate. Telephone calls will be reimbursed with associated VAT when supported by an itemised bill.

Section 5 – Expenditure Not Covered

We regret that the following will not be reimbursed:

- The travel and subsistence for events that you have been invited to in a personal capacity.
- The travel and subsistence expenditure of spouses or other travelling partners will not be reimbursed, unless the attendance of the spouse is an integral part of a specific representational event.
- Expenditure not related to the association's activity.
- Meals purchased at or near your home or place of work.
- Personal incidental expenditure will only be reimbursed up to the limits stated above.
- Gratuities and tips, other than in restaurants, will not be reimbursed. If you wish to add a supplement to a charge, or recognise other service, please make this payment personally.

- Only actual expenditure incurred will be reimbursed and not any round sum meal or subsistence allowances.
- Expenditure related to casual or personal entertaining.

Section 6 – Administration

6.1 Receipts

Valid VAT invoices or receipts must support all expense claim forms. It is recognised that there are certain categories of expense where receipts cannot be obtained, for example, parking meter charges. Un-receipted expenses up to a maximum of **£10** (or equivalent foreign currency) will be paid, providing a reasonable explanation is provided for the absence of a receipt.

6.2 VAT

Where your expense item includes VAT, this should be included in the amount of money you claim. Please do not add VAT to expense claims where VAT is not included on your invoice or receipt.

6.3 Claim Forms

Claim forms are available from the office or from the treasurer in either electronic or paper form. A supply of claim forms will usually be available at meetings involving trustees and/or regional coordinators. They are also available on our website.

Please submit your expense claim forms on a regular basis, and not less than quarterly. To expedite payment, claim forms should be posted directly to the FMA UK office for the attention of the treasurer, or given to a trustee at the meeting you are attending.

6.4 Payment of Claims

We will make payments by cheque as soon as is practicable after your claim form has been submitted.

6.5 Spending Limits

Trustees will have a limit of **£100**. The office can purchase items up to a value of **£100** in one week. This expenditure is restricted to non sale items e.g. office supplies like paper. Any purchase beyond this requires the approval of at least one Trustee. Normal decision making process will be followed for all other purchases beyond this.

6.6 Dispute

In the event of a dispute, please raise the issue in the first instance with the treasurer. In the event that any dispute cannot be resolved in this way, then the dispute should be raised with the chair of FMA UK who will endeavour to resolve any dispute by consulting with the rest of the board of trustees. Please note that the decision of the board of trustees is final.

7. Additional Notes

7.1 Assistant Regional Coordinators (ARC's)

With the creation of this new position ARC's are expected to help the RC and cover duties that will not normally incur costs. The ARC may on occasion have to attend FMA UK meetings in lieu of the RC for their area and in this circumstance they would be covered for expenses.

As per Section 1, if they ARC is asked to attend an FMA UK meeting in addition to the RC then their expenses would be covered.

If an expense is foreseen that will assist the ARC in the performance of their duties then this may be considered. However like any other unplanned expense this **must** be approved in advance.

FMA UK recognise that there is a different approach to ARC expenses than RC expenses and this is related to our current financial situation and like other things will be re-evaluated when this changes. We would not ask an ARC to be out of pocket on behalf of FMA UK so it is important that duties are thought out in advance. Emails and incoming calls are examples of methods of providing assistance without incurring extra cost.