

## Expenses Policy

Issued March 2019

### Contents

1. Overview.....	3
2. Supporting evidence.....	3
3. Overnight accommodation.....	3
4. Overnight incidental expenses .....	4
5. Business and staff entertainment.....	4
6. Travel .....	4
6.1 Public transport:.....	5
6.2 Travel by car:.....	5
6.3 Taxis:.....	5
7. Other travel-related costs .....	5
8. Training courses .....	5
9. Use of telephones and other equipment.....	6
Expense form – See attached form .....	6

### About TalentEd

**TalentEd** is a registered charity, committed to delivering services which address the following objectives:

1. The advancement of education; and
2. The relief of those in need by reason of financial hardship or other disadvantage

# TalentEd

Expert teachers for **bright students**

We do this by supporting high ability students from low income backgrounds to help realise their full academic potential. Working with clear values of being bold, taking ownership, working as one team committed to change lives.

## 1. Overview

This document provides guidelines and establishes procedures for employees and Trustees incurring travel, entertainment and related expenses while on charity business. The policy and procedure does not apply to Tutors who are considered to be self-employed or a limited company contractor. Contractors will not normally be paid expenses, unless agreed in their Agreement and scope of services.

The charity will reimburse all approved and reasonable expenditure incurred in undertaking charity duties. The guidelines enable controlled reimbursement to take place and indicate the evidence and the authorisation required.

Prior approval by the line manager is required for any amendments to the policy or its implementation.

TalentEd employees are expected to take into consideration that all funds are charitable funds and understand that expenses cannot be deemed to be extravagant. It is the Executive responsibility to ensure that costs are controlled. To set firm limits for every eventuality will always be difficult and will never suit every occasion or circumstance for expense reimbursement.

Provided the appropriate supporting evidence is provided the charity will endeavour to reimburse expenses at the earliest opportunity and ideally within 14 days from receipt.

## 2. Supporting evidence

A standard expense claim form (available on request) must be submitted to the line manager and be supported by original receipts, invoices or similar.

Each receipt or invoice should list:

- Description of goods/services supplied
- The total charge
- Supplier identity
- The date of supply

## 3. Overnight accommodation

Where possible, it is expected that employees will secure bookings through the TalentEd office so that negotiated discounts can be applied. If this is not possible, then a common-sense attitude to expense will be expected when making bookings. A typical rate might be up to £55 per night.

Unless booked by the TalentEd office, hotel bills must be paid by the employee or trustee and a claim submitted.

We will reimburse agreed costs for food and drinks supported by receipt for those who are out of office for more than 4 hours. The limits for breakfast, lunch and dinner are £6, £8 and £15 respectively. Alcoholic drinks will not be reimbursed. The Charity will reimburse costs for drinks supported by receipt up to the current HMRC limits (circa £5). Managers will not authorise any claims deemed to be extravagant.

## 4. Overnight incidental expenses

When staying away from home overnight on business, it is recognised that employees may incur some expenses over and above the basic costs of bed and meals (e.g. Wi-Fi). Where possible, these should be agreed in advance with the line manager

## 5. Business and staff entertainment

On submitting a claim for expenses relating to entertainment (staff or business) please ensure you have provided the business purpose, where the event took place, plus the name, status and charity of every person entertained.

Receipts must be provided. Where two or more Charity employees are engaged in entertaining, then the most senior person present should make payments due and claim in the usual way.

The Charity will reimburse all reasonable Business Entertainment of customers/suppliers outside the charity, such as buying coffee.

In most cases, the entire cost of an entertainment expense should be charged to the category 'Business Entertainment', including the costs of the staff member's meal.

## 6. Travel

Central team employees will cover their own cost to and from the central team office.

TalentEd will reimburse reasonable cost of employee's traveling outside of the office for charity business beyond their normal travel distance.

Trustees are entitled to claim travel expenses for attending meetings and when engaged on TalentEd business. Claims must be supported by receipts and should be agreed in advance with the Chair of Trustees.

## 6.1 Public transport:

When using public transport, employees are expected to use the most cost and work efficient tickets. Costs of travel will be reimbursed up to the level of standard class fares.

## 6.2 Travel by car:

Where expenses are agreed in accordance with this policy we will reimburse authorised car use at the standard HMRC rate. Prior to deciding the mode of travel, the employee is asked to check the alternative costs by public transport and to take the most advantageous.

The charity will not be liable for any fines in connection with Road Traffic Act offences such as speeding or parking offenses.

When travelling by car for business purposes the employee should ensure they have the appropriate insurance cover in place as TalentEd cannot be held responsible for any damage that may arise from use of the vehicle for work purposes.

## 6.3 Taxis:

TalentEd employees on business related travel are encouraged to plan their journey in advance. Taxi use should be exceptional and reimbursement of fares will only be made if alternative means of transport are not practicable.

## 7. Other travel-related costs

When traveling outside of the office for business, it is recognised that employees are likely to incur some other related costs (e.g. parking fees etc). Where possible employees are encouraged to try and identify the lowest/nil cost options where reasonably practicable. Claims for any additional costs should be submitted in the normal way.

Where employees anticipate regular travel for business use or are involved in transporting other colleagues in the normal undertaking of their duties, the employee should ensure they have appropriate business travel insurance in place and where there is an additional cost incurred this should be drawn to the attention of the line manager prior to engaging in any work-related travel activities.

## 8. Training courses

Costs of attending authorised training outside London should be agreed in advance with a line manager and will be treated as for business-related travel. The charity

will only pay any travel costs in excess of the employee's usual travel to work costs and where practicable the least cost option between private and public transport.

## **9. Use of telephones and other equipment**

Office phones or mobiles are strictly for charity business and are not for private use other than in an emergency.

All equipment supplied by TalentEd remains the property of TalentEd It should be retained safely and must be returned in good condition if employment ceases. If an employee is negligent in the safe keeping of any property the charity may seek to recover any costs or damages incurred from the employee.

Access to equipment and data is governed by the Data Protection and GDPR regulations and Policy and employees should familiarise themselves with this.

**Expense form** – See attached form