

The Bee Sanctuary Movement

Charity No: 1187263



TRUSTEE EXPENSES POLICY

This is a policy for trustee expenditure and for use for the Bee Sanctuary Movement Trustees to refer to for understanding what expenses can be reimbursed and the correct procedure to follow. For volunteer guidance, please see 'Volunteer Expenses Policy'.

Expenses are refunds by a charity of legitimate payments which a trustee has had to meet personally in order to carry out his or her trustee duties. Expense claims should normally be supported by bills or receipts, except where it is impractical to expect this, for example, where very small amounts are claimed. Expenses are any reasonable costs that allow trustees to carry out their duties and can be classed as legitimate expenses. So long as the charity only pays the trustee for the actual cost or expense, the payment is not taxable. The following are examples of expenses:

If trustees are working from home, are they able to claim for materials that office based staff would have supplied (i.e. stationery and printing, postage)

Communication support: translating documents into Braille for a blind trustee, or into different languages; provision of alerting and listening devices, and other special aids for people with hearing impairment

The costs of buying training materials and publications relevant to trusteeship

Providing special transport, equipment or facilities for a trustee with a disability

The reasonable cost of childcare, or care of other dependants (for example, an elderly parent) whilst attending trustee meetings

Travel

As a small community local charity we do not have an extensive budget to offer travel expenses. Trustees and volunteers come from the local area, so it would be a special case for offering travel expenses which would have to be agreed by 3 trustees.

We support the use of bicycles to carry out volunteer duties at the park, and will support the cyclist volunteers to ensure that their bicycle is safe. It is the cyclist's responsibility to ensure that their cycle is maintained and that they ride safely in the park.

- Rail – In the rare event a trustee is required to travel by rail, they are required to travel in standard class and should be booked as far in advance as possible to take advantage of any early booking discounts. A Trustee must use any railcards for season tickets already paid for as part of their normal commute towards any journey taken on business, where possible.
- Air – Air travel is not applicable at this stage.
- Taxis in an extraordinary case, a trustee may take taxis, a receipt must still be obtained, showing the date, place of departure and destination of the journey.
- Own car/Hire car – Car hire is not permitted. Use of your own car, trustees may be reimbursed for fuel for important cases, at the average current rate. Cases such as distanced meetings or training sessions, or journeys that are essential for business or training. Prior authorisation should be sought prior to a trustee using their car. MOT, parking fines or speeding fines, insurance will not be reimbursed, but road tolls, congestion charges can be. The charity accepts no liability for any accident, loss, damage or claim arising out of any journey that the trustee makes on business, unless this is caused by the organisation's negligence.

Meals and accommodation

Only in a special case can meals or accommodation be reimbursed, and this would have to be

agreed by 3 other trustees prior to arrangement. A special case could be important or essential or specialist training that would benefit the charity, or a special or important event. Basic accommodation would be provided and meals would be standard breakfast, lunch, dinner where necessary, with no alcohol. This also includes any essential care costs. All receipts must be kept and shown.

Expense procedures

A Trustee Claim Form is available on request via Chair, or on shared digital online documents.

Expense claims should be submitted within 3 months. Any late submissions cannot be guaranteed to be reimbursed.

Expense forms must be completed to be reimbursed for any claims, digital or hard copy forms are valid. All receipts/invoices and or supporting evidence (if necessary) to be submitted with the claim. If a receipt is mislaid, we may accept credit/debit card statements if agreed by 3 other trustees.

Expenses will be paid via bank transfer within 30 days of receipt. If without receipt, payment will have to be agreed by 3 other trustees

We may request further details of any expenses claim, and may withhold payment where insufficient supporting documents have been provided. Abuse of this policy includes, but is not limited to false expenses claims, claims for expenses not legitimately incurred, claims for personal gain, claims for hospitality/gifts that induce another party to take improper action, and receipt of hospitality/gifts by the employee that may influence their judgement. The disciplinary policy may be invoked where appropriate and that a breach of this policy may constitute gross misconduct.

For details on data protection or how your data will be stored please see data protection policy.

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