



Expenses Policy

Version: 1.0

Approved: January 2025

Review due: January 2026

Version control

Version	Amendment(s)	Date approved

1. Purpose

The purpose of this policy is to provide clear guidelines on the reimbursement of expenses incurred by staff, volunteers, and trustees while performing charity-related activities. This ensures that expenses are reasonable, necessary, and properly documented, maintaining accountability and transparency.

2. Scope

This policy applies to all employees, volunteers, and trustees of Friends of Berrycroft (FoB) who incur expenses in the course of carrying out their duties on behalf of the charity.

3. Responsibilities

3.1 Trustees

Trustees are responsible for:

- Ensuring expenses claimed are reasonable, necessary, and directly related to their duties.
- Submitting expense claims promptly with appropriate documentation.
- Adhering to this policy and any related procedures.

3.2 Treasurer

The Treasurer is responsible for:

- Reviewing and approving expense claims submitted by Trustees.
- Ensuring expenses are within budget and comply with this policy.
- Maintaining accurate records of all expense claims and reimbursements.
- Reporting on expenses to the Board of Trustees.

4. Eligible Expenses

The following types of expenses are eligible for reimbursement, provided they are directly related to the charity's activities and have been pre-approved, where necessary:

- **Travel:** Costs incurred while travelling to and from charity-related events or locations. This may include public transport fares (train, bus, etc.), mileage (at the current HMRC-approved rate), parking, and tolls.
- **Stationery and Office Supplies:** Necessary purchases for charity-related work, such as paper, pens, or other office materials.
- **Telephone & Postage:** Business-related calls, postage, or courier costs incurred while conducting charity work.

5. Exclusions

The following will not be reimbursed:

- Personal expenses unrelated to charity work (e.g., family meals, personal shopping).
- Fines or penalties (e.g., parking fines, speeding tickets).
- Expenses related to personal or private business.
- Alcoholic drinks (unless specifically agreed in advance for a business event).

6. Expense Claim Procedure

6.1 Submission

- Expense claims should be submitted within 30 days of incurring the expense.
- Claims must be submitted using the official FoB Expense Claim Form.
- Original receipts or other supporting documentation must be attached to the claim form.

6.2 Approval

- The Treasurer will review all expense claims for compliance with this policy.
- Claims must be approved by the Treasurer before reimbursement.
- Any queries or disputes regarding claims will be resolved by the Board of Trustees.

6.3 Reimbursement

- Approved claims will be reimbursed within 14 days of approval.
- Reimbursement will be made by bank transfer to the Trustee's nominated account.
- Reimbursement may not be processed unless all required receipts and information are provided.

7. Monitoring and Review

The Treasurer will monitor the implementation of this policy and report on expenses to the Board of Trustees. This policy will be reviewed annually by the Board of Trustees to ensure it remains relevant and effective.

8. Communication

This policy will be communicated to all Trustees and made available on the FoB website. Any updates or changes to the policy will be promptly communicated to all Trustees.

9. Monitoring and compliance

The charity will regularly monitor and review expenses to ensure they are in line with this policy. Any staff member or volunteer found to have claimed expenses improperly may be subject to disciplinary action.

10. Amendments to the Policy

This policy may be reviewed and amended as required by the Trustees and will be communicated to all staff, volunteers, and trustees.

11. Policy Approval

This Expenses Policy is approved by the Board of Trustees of Friends of Berrycroft and is effective from the date below.

Approved by: (Signature)



Approved by: (PRINT NAME)

Jacqueline Harris

Chair of Trustees, Friends of Berrycroft

Date: 26/01/2025

Expenses claim form



Full Name:

Position/Role:

Claimant Type: [Employee / Volunteer / Trustee]

Date of Submission:

1. Detail of expenses

Date	Description of Expense	Category (travel, stationary, postage etc.)	Amount (£)	Receipt Attached? (Yes/No)

Total amount claimed: £

2. Mileage claim (if applicable)

Date	From	To	Miles Travelled	Rate (p/mile)	Amount (£)

Total mileage claim: £

3. Declaration

I confirm that the expenses listed above were incurred in the course of performing duties on behalf of Friends of Berrycroft and are in accordance with the charity's expenses policy. All receipts and supporting documentation are attached. I understand that false claims may result in disciplinary action.

Claimant Signature:

Date:

Approved By:

Approval Date:

Amount Approved (£):

Payment Method: