

Expense policy for members and volunteers

1. Summary

IChemE values the contribution that its members and volunteers make to the Institution.

IChemE's policy is to reimburse the cost of any reasonable expenses incurred whilst on IChemE business or in the course of their volunteering.

In order that IChemE can make the best use of its resources, staff, members and volunteers are encouraged to consider value for money and to reduce the overall cost for IChemE. For example:

- Consider whether teleconferencing or videoconferencing solutions are more cost effective. Sessions should be booked via our preferred conferencing facility provider to minimise costs.
- Obtain the best rates for travel wherever possible by booking train, airfares etc, well in advance as well as selecting off peak travel or using travel cards.
- Some employers may agree to cover their employees' expenses, or it may be possible to combine IChemE and company business and thus reduce costs.
- If combining IChemE and private business, it would be appropriate to divide the costs so that the full amount is not claimed.

Should members or volunteers have any concerns about the costs of travelling they should be discussed in advance with the member of IChemE staff supporting their meeting, activity or event.

2. Who can claim

- 2.1. Members of the Board of Trustees and Congress, members and volunteers attending Committee / Panel meetings or any other meetings where they are invited to attend by the Board of Trustees or the Staff.
- 2.2. Regional Group or Special Interest Group committee members attending meetings of their Group.
- 2.3. Qualification and accreditation assessors/reviewers.

3. Allowable expenses

- 3.1. Members may claim for reasonable out of pocket expenses (i.e. travel, accommodation and subsistence) necessarily incurred when carrying out IChemE business.
- 3.2. Expenses should be claimed on the relevant claim form. They should be itemised and must be accompanied by original VAT invoices or receipts to enable IChemE to recover VAT as appropriate. Credit card vouchers cannot be accepted as an alternative to VAT invoices or receipts.
- 3.3. Expenses cannot be paid for voluntary attendance at meetings or events.

- 3.4. All claims should be submitted within one month of the date of the meeting, activity or event. In special circumstances, claims between one and three months old may be reimbursed at the discretion of the Finance Director or Chief Executive but will not be permitted without a valid reason.
- 3.5. Where a member or volunteer has specific travel needs (i.e. health related), they should contact the IChemE member of staff supporting their meeting, activity or event in advance of making their travel arrangements to discuss their requirements.
- 3.6. Reimbursement of expenses will be made as follows:
 - 3.6.1. Standard class rail or bus fares. The use of sleeper accommodation is reclaimable where appropriate e.g. as an alternative to flying when attending early morning meetings. Members and volunteers are asked to take advantage of any discounted fares where available (i.e. advanced bookings, use of railcards). Taxis may be used but only if other transportation is unavailable.
 - 3.6.2. Economy class air travel for short haul flights (less than 7 hours) and premium economy for long haul flights (7 hours or above). Where premium economy does not exist, this should be discussed with the IChemE staff member supporting their meeting, activity or event. Where the flight time is more than 7 hours, a member or volunteer may claim overnight accommodation for the night before and/or after the meeting.
 - 3.6.3. When using a private car, members and volunteers must ensure that their insurance policy includes cover for driving whilst on IChemE business as a member or volunteer. Car mileage costs may be claimed at the following rates for 2022/2023:
45p per mile for the first 10,000 business miles in the tax year
25p per mile for business miles over 10,000 in the tax year
 - 3.6.4. Accommodation costs may be claimed where it has been agreed with the IChemE member of staff supporting the meeting, activity or event that overnight accommodation is necessary. Members and volunteers should take advantage of any special rates available.
 - 3.6.5. Where members and volunteers are required to stay overnight on IChemE business or are travelling after 8pm, reasonable expenses for an evening meal and beverages (one alcoholic drink) may be claimed.
 - 3.6.6. Reasonable expenses for breakfast may be claimed where members and volunteers are required to leave home prior to 7am.
 - 3.6.7. Reasonable expenses for lunch may be claimed for members and volunteers attending a full day IChemE business meeting where refreshments are not provided.
 - 3.6.8. The costs of alcohol are not eligible expenses for subsistence during working hours.
 - 3.6.9. Claims for subsistence on behalf of a group of members or volunteers must be accompanied by the names of all those in attendance included in expense claim.
 - 3.6.10. Any other expenses will only be reimbursed if they have been agreed in advance with the IChemE member of staff supporting the meeting, activity or event, and are fully receipted.

4. Exceptions

- 4.1. Members and volunteers should note that the following expenses will not be reimbursed:
 - Credit, debit card and charge card administration fees or interest (except charges associated with currency conversion)
 - Laundry service/dry-cleaning (unless on IChemE business for longer than one week)
 - Mini-bar contents
 - Movies/videos
 - Parking fines
 - Speeding fines
 - The loss/theft of goods

- Maintenance or damage to personal vehicles
- Childcare or pet care
- Tourist attractions
- Newspapers
- Alcoholic beverages not complimenting an evening meal
- Private telephone calls
- Private line rental

Part B: Procedure

Approval

1. All claims must be submitted within one month of the date of the meeting, activity or event.
2. Completed claim forms should be sent directly to the Finance Department at Rugby who will arrange for the claim form to be approved in line with IChemE's financial procedures.
3. Original VAT invoices or receipts for all items claimed must be attached to the claim form. This enables IChemE to recover VAT as appropriate and may also be examined by IChemE's auditors. Credit card vouchers cannot be accepted as an alternative to VAT invoices or receipts.
4. Please use **BLOCK CAPITALS** on the claim form.
5. Once approved, expenses will be reimbursed on the next available payment run are made on or around the 15th of the month and the last working day of the month.
6. Our preferred payment method is by bank transfer. If we do not already hold your bank details, or your details have changed, please add them to the relevant section of the expense claim form. Your bank details will be held securely on IChemE's finance system for future expense claims.

Member and Volunteer Expense Claim Form

Travel, Subsistence & Misc.

Please read expenses policy before completion. All claims should be submitted within one month of the meeting. Please email claim form to accountspayable@icheme.org

Name: _____

Address: _____

Post Code: _____

Date of Meeting: _____

Meeting Title: _____

Date of Claim: _____

Signature: _____

Responsible Dept: _____

<u>Nature of Expense</u>	<u>Amount</u>	<u>Code</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

TOTAL _____

PLEASE REMEMBER TO ATTACH ALL SUPPORTING RECEIPTS TO THIS FORM

Authorised Signature: _____

Department: _____ Date: _____

Our preferred method of payment is by bacs. Please provide your details below:

Bank Name & Address:

Sort Code: **Account No.:**

Account Name: **Signature:**

Document Control

Version No	Date	Changes
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