



BOTANICAL SOCIETY OF BRITAIN & IRELAND

EXPENSES POLICY

Prepared by & date:	Julie Etherington, Finance Manager, July 2021
Approved by & date:	Board of Trustees, 7 Sept 2021
Next Review due:	Autumn 2024 (3 year review interval)

1. Purpose

- i. This Policy is to provide clear guidance on the type and level of expenses that will be reimbursed by BSBI and replaces the existing Policy dated April 2016.
- ii. BSBI must ensure that all of its expenditure is relevant & appropriate to its charitable objectives. This Policy helps achieve that by aiming to ensure that no-one inadvertently incurs expenses which BSBI can neither justify nor reimburse.

2. Why we have this Policy & its scope

- i. Many BSBI meetings are now held remotely via Zoom or other means and this has significantly reduced travel costs incurred, however there will always be a need to travel to meet face to face and an Expenses Policy which gives guidance on this therefore remains important.
- ii. This Policy applies to expenses claimed by all BSBI employees and volunteers; Trustees, Committee members and others on BSBI business.
- iii. BSBI is deeply grateful to its volunteers and is very happy to reimburse expenses incurred in line with this Policy. Trustees are aware many volunteers choose not to claim expenses and this is also very much appreciated.

3. What can (& cannot) be claimed

- i. What can (& cannot) be claimed is set out in the table below. Individuals are asked to minimise costs wherever possible by, for example, booking as far ahead as possible, taking advantage of advance or discounted rates. Care should be taken with making non-refundable reservations, however.

What	Rate	Notes
Rail travel	Standard Class	If first class travel is preferred, the additional cost must be paid by the claimant.
Underground travel		
Air travel	Standard / 2 nd Class	Air travel to be used where it avoids overnight accommodation; especially useful for those travelling from Ireland & Scotland
Car travel	40 pence per mile / 45 € cents per mile	Try to car share wherever possible
Taxis	Fare only	May be used where cost effective for groups, for travelling with heavy luggage or for personal safety
Parking		Use free parking if available & safe
Overnight Accommodation	B&B	Claimable by prior approval only (see section 4)
Meals, drinks & refreshments	With no overnight stay (before or after)	Not claimable. Individuals are encouraged to bring food & drink from home
	With overnight stay (before or after)	Claimable to a maximum of £10 per half day, £25 per full day

- ii. Individuals are asked to note:
- a. To obtain prior approval if intending to incur expenses not described above. See section 4.
 - b. To share the cost of travel expenses equitably if combining other business or personal arrangements with a BSBI meeting.
 - c. Sometimes committee meetings are held in conjunction with events at which committee members would be present anyway as ordinary members of the Society, such as the AGM. It is customary to waive claims for travel expenses on these occasions, unless this would be unreasonable in individual circumstances.
 - d. Re volunteers' other expenses; except for the Membership Secretary and Committee Secretaries, it is not usually appropriate to seek the refund of small items of postage, phone calls etc.

- e. For cancelled or postponed travel arrangements, all available refunds should be promptly claimed & paid to BSBI
- f. When travelling & undertaking BSBI activities, individuals must comply with all relevant Covid regulations & guidance eg. when considering whether car sharing is appropriate.

4. How & when to claim and get paid

- i. Claims and requests for prior approvals are to be sent to Julie Etherington, BSBI Finance Manager at Julie.etherington@bsbi.org 07944 990399.
- ii. Claim formats:
 - a. By employees: must be made by completing an Expenses Claim Form (template at Appendix 1) along with supporting VAT receipts / invoices.
 - b. By others: may be made by completing an Expenses Claim Form (template at Appendix 1) or simply by email request & explanation, along with supporting VAT receipts / invoices.
- iii. Claims can be submitted for a month, a calendar quarter or (more appropriate for volunteers) as a one-off claim. Claims must be made promptly; no later than 2 weeks after the end of the calendar quarter in which the expense was incurred. Eg. An expense incurred 19th April 2021 must be claimed by 14th July 2021.
- iv. The Finance Manager makes payments every 2-3 weeks. Once a claim is checked & authorised, payment will be made on the next available date.
- v. Payment is made by Faster Payment (direct bank payment). If claiming for the first time, or bank details have changed since the last claim made, please include with the claim:
 - a. If payment is to be made in £ - Bank account number & Sort code
 - b. If payment is to be made in € - IBAN number

5. Duration & remit

- i. Once approved, this Policy remains effective until further notice.
- ii. This Policy will be reviewed every 3 years, or earlier if needed.