

Expenses Policy

Introduction

As a District we recognise that we rely on both salaried and voluntary personnel, drawing on the expertise of both ordained and lay people. Where anyone in these groups incurs additional costs as a result of carrying out agreed duties that form part of the role, the employer (District/Circuit/Local Church) will meet claims for appropriate expenses. Employees or volunteers may occasionally undertake work on behalf of another employer (eg a church volunteer might arrange a catering on behalf of the district), and expenses should be claimed in these circumstances from the organisation on whose behalf the employee or volunteer is undertaking the task.

All expenses should be claimed within 3 months on the appropriate expenses form, provided by your employer. Where expenses are significant, monthly claims should be completed. These will then be paid as soon as possible. If there is a significant delay in claiming expenses, without reasonable cause, payment might not be made.

Particular care should be taken to ensure all expenses for the Methodist financial year (to 31 August) are claimed by the first week of September of the following year, wherever possible.

All claims will be checked before being paid. Where a claim is considered inappropriate, or does not have all the relevant supporting documentation, payment might be withheld until such time as the claim is agreed, amended or withdrawn.

Please include all receipts when making a claim. If a receipt is lost or unavailable, include an explanation on your claim form.

**Yorkshire North and East District expects that lay employees will:**

* claim only for expenses which have been legitimately incurred while doing work for their employer;
* do their best to minimise costs by using the most economical means of travel, parking and accommodation;
* submit claims promptly using their employer’s expenses claim process and including itemised receipts.

Line Managers will check claims thoroughly and approve them promptly so that staff can be reimbursed as quickly as possible.

Line Managers will raise concerns about excessive claims and support employees to find ways of minimising costs

Breaching this policy is a disciplinary offence. Deliberate falsification of a claim, or the evidence needed to make a claim, will constitute gross misconduct. This may result in summary dismissal.

Essential Travel

to meetings, training and events held at locations other than your contractual place of work:

* Standard class travel on trains and buses. Where possible, tickets should be booked in advance and for fixed time travel outside of peak hours, rather than open returns.
* Car mileage is paid at £0.45 per mile up to 10,000 miles in any financial year. After 10,000 miles it is paid at £0.25p.
* Motorbike mileage is paid at £0.24 per mile.
* Bicycle mileage is paid at £0.20 per mile.
* Claims for mileage must be for additional travel (e.g. if your normal journey to work is 20 miles, and your journey to the other location is 30 miles, you can only claim the difference e.g. 10 miles).
* You may claim reasonable essential parking costs.
* Mileage payments are designed to compensate for the use of the vehicle and so no additional expenses for running costs, insurance or maintenance can be claimed. If you are claiming mileage you must have appropriate business use insurance and MOT (this is a legal requirement).
* Where two or more people attend the same event on the employer’s behalf, consideration should be given to car sharing. An additional 5p per mile, per passenger, can be claimed where two or more travel together.

A contracted home worker whose residence is outside of their employer’s geographic boundary (eg. circuit boundary), can claim mileage expenses calculated from the nearest location within the circuit boundary and not from their home residence.

**Expenses may not be claimed for:**

* First class travel unless it is equivalent to, or cheaper than, standard class and authorised in advance by a manager (you must provide proof of the price difference)
* Taxis or air fares unless authorised in advance by a manager
* Parking penalty charges, parking fines, wheel clamp removal, etc

Meals and Hospitality

The cost of meals when on District/Circuit/Local Church business should not normally be claimed, particularly if there is time and opportunity to make alternative arrangements. Your employer would not normally offer subsistence payments to those who are away from home for significant periods.

The costs of reasonable hospitality, when engaging in the normal course of work, may be claimed. However, these should not be excessive or frequent. All claims should identify the number of people attending and the reason for this expense - plus a receipt for the costs incurred.

When an employer hosts an event or meeting, it may be appropriate to provide refreshments and claims for agreed expenditure will be reimbursed. A record should be kept of the number of people attending and hospitality provided (e.g. coffee and biscuits or lunch). This should be detailed on the claim. Receipts or invoices covering the costs incurred should also accompany any such claim.

Overnight Accommodation

This will normally only apply to pre-authorised travel and should be booked as far in advance as possible to keep costs to a minimum, using B&B, Travelodge or equivalent budget accommodation.

Training and Events

Employer-funded attendance at events and training costs should be agreed in advance. Where accommodation is included as part of the cost, this should be authorised in the same way.

Telephone and Broadband

In line with HMRC guidance, round sum allowances for telephone or broadband will not be paid. However, reasonable and proportionate claims for additional telephone costs incurred may be made. All such claims should be supported by a copy of the relevant itemised bills highlighting the amounts claimed.

Homeworkers are able to claim £6 a week from the employer towards costs incurred by working at home. See the Home Working Policy.

Office Equipment

See the Home Working Policy

Photocopying and Printing

Photocopying on behalf of the employer should be recharged at cost. Where copying is outsourced to another church/circuit/district, the rates should be agreed in advance. Where small amounts of printing/copying are done and the cost is not easily identified, claims can still be made at the rates of 5p for B+W and 15p for colour per sheet. Where larger amounts of copy/ printing are needed it may be more appropriate to recharge the cost of paper and ink cartridges.

Any disputes over expenses will be dealt with by your Line Manager.

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