

Central England Area Quaker Meeting (CEAQM)

Guidance

for Area Meeting, Local Meetings, Committees and Branches on Expenses claims by employees, volunteers, Members and Attenders

1. *Definitions*

In this document,

Employee means someone employed by the Area Meeting, and excludes self-employed people. Anyone employed by a Local Meeting or Branch is legally an employee of the Area Meeting.

Voluntary worker: voluntary workers are people who give freely their time, skills and experience without expecting a financial reward. They are entitled to core employment rights and will have a contract. See the CEAQM Health and Safety at Work Policy for a more detailed definition.

Member here includes Members and Attenders (as defined in Quaker Faith and Practice, Fifth Edition, 11.37 & 11.38) acting on behalf of the Local or Area Meeting, as part of their Quaker service. They will usually have been appointed via the Quaker nominations procedure. They are not volunteers for the purposes of this policy.

Volunteer: For the purposes of this policy, a volunteer is defined as any individual who willingly gives their time, energy and skills, without payment of wage or salary, for the benefit of both themselves, CEAQM and to the good of the community. They are specifically recruited as volunteers, through a process that is open to all, and not restricted to Members and Attenders of the Religious Society of Friends.

2. *Before incurring expenses...*

An **employee, voluntary worker or volunteer** should check with his/her line manager before incurring any business-related expenditure. Line managers may provide guidance on acceptable expenditure which will be reimbursed, for example, where the employee, voluntary worker or volunteer is responsible for maintaining supplies at a Meeting House.

Members should ensure that the expenditure is approved by the Local or Area Business Meeting, or is incurred legitimately as part of their role or office in the Meeting. Expenditure above a locally-set limit (which will be available from the relevant Treasurer) will need to be supported by a Minute of the relevant Business Meeting or Committee.

Re-imburement may be refused if prior agreement has not been obtained.

3. *Claiming expenses*

Expenses claims should be accompanied by receipts and should be claimed promptly. Treasurers may issue claims forms if appropriate (see below). Expenses should be claimed as soon as possible after they have been incurred unless there is a local arrangement to claim periodically e.g. monthly.

4. *Travel Expenses*

4.1 *General principles*

Employees, voluntary workers, volunteers and Members are asked to use public transport whenever possible, for cost and environmental reasons. Tickets should be retained and

produced as evidence of expenditure.

4.2 Claiming travel expenses – employees, voluntary workers and volunteers

Employees, voluntary workers and volunteers may claim re-imbursment of travel expenses incurred in the course of their duties, subject to the prior agreement of their Line Manager. Where an employee travels directly from home to her/his destination, the claim should only cover those expenses which are extra to which would normally have been incurred in attending the place of work.

When necessary, CEAQM, or its Local Meetings or Branches, will pay mileage for use of an employee's or volunteer's own vehicle. Employees claiming mileage may need business-use vehicle insurance.

Agreements with voluntary workers and volunteers may specifically provide for the costs of travel to and from their workplace to be reimbursed.

4.3 Claiming travel expenses – Members

Members may claim travel expenses when acting on behalf of the Area or Local Meeting, but they should be clear that the expenditure is authorised by AM or LM. This may often be implied by the role or office that they hold (e.g. an Overseer visiting a Member/Attender).

4.4 Mileage allowance payments

These can be found on the gov.uk website. Currently, 2020 they are:

For the first 10,000miles:

Cars and vans 45p/m

Motorcycles 24p/m

Bikes 20p/m

5. Suspect expense claims

If the person approving the claim suspects that it is false, payment will be withheld pending an investigation and possible disciplinary action.

A model expenses claim form, for general expenses and public transport, and for vehicle use is available.

Related documents

CEQ Recruitment Selection and Appointment of Staff

CEAQM Staff Contract

Disciplinary Procedure

Expenses Claim Form (model)

Health and Safety Policy and Procedures

Service occupancy agreement

Volunteer Policy

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