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## Association for Promoting Retreats

### Trustee Expenses Policy and Guidelines

#### 1. Applicability

This policy applies to all Staff, Volunteers, Trustees, Casual workers, and anyone incurring travel and other out-of-pocket expenses on behalf of the Association for Promoting Retreats (APR).

Contractors are not covered by this policy. They should invoice for their expenses, as per any agreement in their contract.

#### 2. Principles

##### 2.1 Eligible expenses

We will only pay expenses that are reasonable, and incurred exclusively and necessarily in carrying out the work of the APR.

##### 2.2 Approval and Payment

No one may:

- Both authorise and pay a claim.
- Either authorise or pay themselves, or family member or any company in which they have an interest, either directly or through a family member or close friend.

##### 2.3 Novel and Contentious Expenditure

Will only be paid in exceptional circumstances, and very rarely without prior approval. All such expenditure must be approved by the APR Treasurer and/or APR Chair of Trustees.

- **Novel** - does not meet the letter of our regulations, such as paying an expense that has not been authorised, or payment of subsistence rates or class of hotel accommodation that exceed the limits in this policy.
- **Contentious** - meets the letter of the relevant policy, but where the need for it or the cost involved may reasonably be questioned.



## **2.4 Environmental**

Where travel is necessary, sustainability and environmental issues will be taken into consideration when planning meetings and journeys.

## **3. Administration**

Expenses may only be claimed for approved travel and out-of-pocket expenses, using an APR Trustee Expense Claim form.

### **3.1 Submitting Claims**

An expense claim form should be completed:

- Attaching original receipts
- Submitted for approval to the APR Treasurer, APR Chair or APR Administrator.

### **3.2 Checking and Approval**

The APR Treasurer, APR Chair or APR Administrator is to check all expenses claims to confirm that the costs incurred were:

- Reasonable, and necessarily and exclusively incurred in carrying out the work of the APR
- Supported by receipts
- Comply with the procedures and limits in this policy

Claims not supported by receipts will only be approved in exceptional circumstances, where it was not reasonably possible to obtain a receipt. This is to be explained in sufficient detail in the claim to demonstrate this is the case.

## **4. Claimable Expenses**

### **4.1 General**

Trustees should travel by the most cost-effective mode of transport considering journey time, nature of the journey and cost. The start and end points of travel and reason for travel should be stated on the claim.

### **4.2 Rail Travel**

Trustees should, as far as possible, book the most economical tickets in advance and travel standard class. First class rail travel may be used where there is a justifiable special need, such as restricted mobility due to a health condition. This requires prior approval and you may be required to provide a doctor's certificate or similar to justify the need.

### **4.3 Taxis**

Public transport should be used where possible, but taxis may be used if:



- Public transport is unsuitable e.g. heavy or bulky equipment is being transported or the passenger has restricted mobility.
- Public transport is not available, such as late at night or during a strike.
- A taxi would be cheaper.
- A emergency, such as someone being taken to A&E, or for Health & Safety reasons including carrying large amounts of money.
- If unavoidably travelling late (after 9pm) and not using a taxi would represent a material risk to an individual.

#### **4.4 Private Vehicle**

You may use your own car provided that:

- You hold a current driving license.
- Your vehicle has a valid MOT and insurance policy

Costs for parking and any congestion charging will be reimbursed. The APR will not reimburse any fines or infringement penalties, for parking, late payment of congestion charging or similar. The APR will pay the HMRC vehicle mileage rate, or similar, to be reviewed every two years.

#### **4.5 Air Travel**

Air travel may only be used in exceptional circumstances where it is significantly cheaper than other options or where using other means of transport would require an overnight stay or an unreasonably late return home. Flights are to be economy class, unless a higher class would cost the same or less and additional costs such as additional baggage entitlement are not repayable.

#### **4.6 Subsistence**

Where Trustees are required to be away from your place of work for 5 hours or more and food/refreshments are not available at the meeting or event, the APR will pay reasonable subsistence. In the case of breakfast, you will have left home by 6am and, in the case of evening meal, are staying overnight or will be unable to return home before 9pm. Claims may include other costs, such as WiFi, where this is essential to carrying out your work, but not alcohol or expenses for entertaining.

#### **4.7 Accommodation**

Overnight accommodation may exceptionally be booked when it is reasonable and cost effective to stay away from home. A maximum of £25 with receipts may be claimed for staying overnight with friends or relatives. A further subsistence allowance for dinner may also be claimed with receipts in relation to the overnight stay.

#### **4.8 Shared Expenses**

Where expenses are paid for a group, one person should be designated to pay and submit the claim, which should include the names of all Trustees or other people included.



## 4.9 Trustee and Volunteer Expenses

Subject to the provision of this policy and with prior approval from the APR Chair or APR Treasurer, Trustees and other volunteers may be given approval to claim for:

- Travel to and from meetings/activities
- Overnight accommodation
- Postage, telephone calls and broadband time for charity work
- Childcare or care of other dependants while attending meetings

Other payments to trustees, such as for being a trustee, or for the provision of goods and services are covered by specific Charity Commission regulations and are not covered by this policy.

## 5 Minimising Cost and Environmental Damage

Undertaking travel has a real cost, not only in financial terms, but also time, so should only be approved where the benefits clearly exceed the cost of doing so. Equally, whilst our individual contributions to climate change are tiny, collectively these are not; we can all make a difference. The questions below are not intended to direct Trustees, but to challenge them positively to consider how best to minimise financial and other costs, whilst still getting the job done.

- How much will this cost? Specifically:
  - Days away from home. Time spent travelling is a real non-financial cost.
  - Financial costs – travel, hotels, subsistence, transport, parking charges etc.
- In what way and how much will this contribute to the APR's aims?
  - Longer travel time and higher costs require more justification.
  - How important is this travel in terms of meeting our objectives? Is it essential, or just something that would be good to do?
- Could we achieve most of the benefit in another way that is less expensive in time and money? For example:
  - Arranging a teleconference, Zoom or video call instead.
  - Where more than one person is attending an event/activity, do both need to attend?
- Could we achieve this more effectively through better coordination? For example:
  - Short notice bookings restrict choice and often cost more.
  - Where an individual travels regularly to various locations, is it feasible to say make one extended trip, rather than individual ones?
  - If an individual visits a location regularly, is it feasible to do so less frequently, but for longer?
- For travel by car, do we encourage car sharing?
- In light of the answers to the above, can I/we justify this expense?

APR Trustees  
July 2025

