

HQIP Expenses Policy 2023

As a charity supported by public funds, HQIP must seek best value for money and avoid unnecessary costs. In practice, this means planning meetings and other activities so as to minimise cost.

This policy applies to anyone claiming expenses, this includes staff and other claimants undertaking HQIP work, for example advisory group members and patient representatives.

Other claimants: should only submit expenses relating to meetings or events attended at HQIP's invitation and which are not funded from any other source (and include items 1 – 4 below where relevant).

Staff: under homeworking arrangements, staff may submit an expense claim where in-person attendance at meetings is required (either for internal HQIP meetings or at other external meetings on HQIP related business) or costs are otherwise incurred for:

1. Travel
2. Hotel accommodation
3. Attendee carer allowance
4. Miscellaneous expenses.

Staff and other claimants should retain receipts of purchase and complete the Expenses Claim Form when any of the above applies. Staff may only claim expenses relating to the performance of their role and which have been approved by their line manager. Expenses which exceed the values set out in this policy must be discussed and agreed with the staff member's line manager before they are incurred.

How to claim

Please ensure that you:

- Complete the Expenses Claim Form and attach original receipts for each item
- Provide your full address, bank account details and an e-mail address
- Sign and date your Claim Form
- Ask your line manager to sign your Claim Form (enclosing copies of the associated receipts saved in one pdf document)
- Send the completed and authorised form to finance@hqip.org.uk
- Claim any expenses within two months of incurring the expense. Later claims will only be accepted in exceptional circumstances. Prior year expenses cannot be processed

Once received, expenses will be paid by BACS transfer to your bank account within 30 days of receipt of your completed Expenses Claim Form (and earlier where possible).

You can claim the following types of expenses:

Travel

- Rail/Coach
 - Standard class travel only unless the purchase of a first-class ticket has been agreed in advance by HQIP, or a first-class fare is cheaper
 - The purchase of advance, off-peak or discounted tickets should be used whenever possible
 - If using an Oyster card for underground travel a print out of your journey must be included with your claim
 - HQIP will not be liable for any invalid tickets which were purchased by the claimant unless HQIP directed those tickets to be bought
 - If a meeting or event is cancelled by HQIP and the claimant is unable to receive a full or partial refund from the rail operator, HQIP will refund any loss incurred by the claimant.
 - Most trains include free Wi-Fi as standard; however, in the situation where free Wi-Fi is not available in a standard fare carriage, and for journeys in excess of 2 hours, HQIP will refund the cost of the daily Wi-Fi rate for that train. Receipts must be provided.

- Taxis
 - Should only be used when there is no suitable public transport, for accessibility or personal safety reasons, or when there is a group travelling and a taxi may be cheaper.

- Air travel
 - Will only be covered under the following circumstances:
 - The claimant is travelling outside England or
 - Time does not allow for another form of travel or
 - Air travel is cheaper than other alternatives (rail, bus, car).
 - First class air travel is NOT permitted.
 - Business class travel is only permitted for air journeys in excess of six hours or in very exceptional circumstances, such as where there are no suitable economy class facilities to accommodate disabled or other special needs requirements.
 - All cases of air travel above standard class must be approved by the relevant Director of Operations, CEO or Chair of the Board of Trustees and a record of the approval should be retained and submitted as supporting documentation as this may be subject to public scrutiny.

- Car hire
 - The costs of car hire will only be covered when hire is quicker or cheaper than public transport. If you intend to hire a car for HQIP business, you must seek prior authorisation from your line manager.

- Personal travel
 - Where the use of a car is quicker, cheaper or more convenient for the claimant, mileage can be claimed in line with HMRC guidelines <https://www.gov.uk/government/publications/rates-and-allowances-travel-mileage-and-fuel-allowances/travel-mileage-and-fuel-rates-and-allowances>
 - Please retain receipts for petrol purchased during journeys made to HQIP meetings
 - Claimants using their own vehicles for HQIP business must hold a current driver's licence, have necessary tax, MOT and insurance, and vehicles must be roadworthy
 - Speeding, parking and other traffic infringement fines, including fines for non-payment of fees such as the congestion charge or tolls will not be reimbursed
 - HQIP does not accept liability for damage caused to or loss of private vehicles or contents whilst used on HQIP business nor liability for claims by passengers or third parties, nor will HQIP reimburse loss of no claims discounts or insurance excesses.

- Parking
 - Parking near to venues and stations will be covered. Overnight parking will not be covered unless essential
 - HQIP is not liable for damage to or theft from your vehicle.

All HQIP employees that are UK based will be eligible for the above expenses. Any HQIP employees who are not resident in England should discuss and agree the appropriateness of travel for work before incurring any expenses. Claims should be in line with agreements made at the start of employment with HQIP

Hotel accommodation

The cost of hotel accommodation can be claimed when:

- A meeting extends over more than one day and you are attending on more than one day
- If the journey to the meeting or event would require you to leave home before 6.00 am or arrive home after 10.00pm
- Where the cost of travelling exceeds the cost of accommodation
- Costs should not exceed a maximum of £100 per night outside London, and a maximum of £200 per night in London.

Any overnight stays in order to attend internal HQIP events or other meetings on behalf of HQIP must be agreed in advance with your line manager.

Subsistence

- Subsistence for lunch can be claimed if you are away from your home office base for 4 hours and this covers the hours of 12-2.
- Subsistence costs will be reimbursed at the rate of up to £10 per day for daytime events, and up to a further £20 if evening travel or an overnight stay is necessary
- The cost of alcoholic drinks are excluded
- All claims must be receipted and only the actual costs incurred can be claimed.

Attendee Carer Allowance

- HQIP will meet reasonable expenses if you require a carer or support worker to accompany you to a meeting or event
- Your needs should be discussed in advance with the meeting organiser
- Reimbursement of hourly support costs will be considered on a case by case basis provided costs are not met from another source such as social services
- You will be required to provide receipts and these should include details of the carer's registration or the provider organisation.

Miscellaneous

- In exceptional circumstances it may be possible to claim for consumables or other expenditure which are essential for the completion of your work duties that are not included in the above list. Please ensure that these are discussed in advance of claiming with your line manager. If approved, list these items on your Expenses Claim Form and provide receipts
- Claimants with any special needs or disabilities should please discuss these with HQIP
- Queries should be submitted to finance@hqip.org.uk.

Foreign Currency

- Where currencies other than GBP are being claimed, please provide proof of exchange rate e.g. credit card statement/currency exchange bureau receipt. If this is not provided then the applicable rate published on <http://www.xe.com/currencytables/> on the date the charge was incurred will be used.