**Introduction**

This policy is designed to assist the steering group members, staff and volunteers in claiming legitimate and reasonable ‘out of pocket’ expenses incurred while conducting activities on behalf of Insert name of forum. This document should be read in conjunction with the forums financial control policy and constitution/articles of association. (delete as appropriate)

**Basic expenses**

Out-of-pocket’ expenses are the additional cost you have incurred directly related to activities you have undertaken for insert name of forum. ‘Out-of-pocket’ expenses will only be given in line with agreements made in advance of submitting a claim.

Insert name of forum will reimburse pre agreed expenditure paid for personally by volunteers or staff, providing prior approval has been given by the steering group, which includes the following:

* Insert name of forum will cover travel to and from the meeting venue and any prior agreed travel undertaken during the course of volunteering
* Refreshments will normally be provided free of charge to representatives where appropriate. However, there will be occasions outside of this and Insert name of forum will reimburse the pre-agreed cost
* Insert name of forum will make a contribution towards agreed childcare expenses incurred while representing the forum
* Insert name of forum will reimburse other minor expenses supported by receipts if agreed in advance with the steering group such as Photocopying, Postage or Phone calls - prior agreed reasonable additional and essential costs

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# **Expenses, payments and honoraria**

Insert name of forum remuneration fee for attending strategic participation meetings is insert amount per hour. This fee is payable on receipt of a countersigned expenses claim. Insert name of forum occasionally give vouchers in recognition of parental involvement. This will be in line with the grant terms for example an maximum of £25 per person per year (2024/25 year).

However, payment can affect parents’ benefits. It is not possible to write simple guidance on how much a parent could earn before affecting their benefits as it is very much dependent on the individual’s financial situation.

The safest option for any parent, who is considering receiving payment, by money or by voucher, is to ring the Contact free parent helpline to find out if, and how much they could earn without affecting their other benefits and entitlements. Contact a Family's helpline has qualified financial advisors who can help them with this (0808 808 3555).

**Making Expenses Claims**

* For first time claims, all parent carers are required to complete the Insert name of forum ***Expenses declaration sheet***. This will need to be signed before any expense claims can be processed.
* Claim forms are available via the forum main email address or will be posted upon request.
* **Payments will only be made on presentation of a complete, countersigned expenses claim with securely attached receipts or invoices.**  Receipts must include the date, place of spend and breakdown of spend (usually a debit card receipt will not cover these so ensure you get a till receipts).
* Claims should be submitted monthly. **Claims for expenses over 3 months old will not be accepted.**
* The accounting period runs from 1st April to 31st March every year. To enable us to comply with our grant monitoring, claims must be received **by the second week in** **April** for any claims up to and including the 31st March every year.
* These occasional representations on behalf of Insert name of forum do not constitute a contract of employment, but any honorarium payment may be classed as earnings by HMRC. It is the sole responsibility of individuals to notify HMRC of their earnings/expenses. If you are claiming benefits it is your responsibility to declare your earnings/expenses where appropriate to any other relevant agencies.

## **Expenses – criteria and amounts**

## **Travel Expenses Criteria**

* Insert name of forum will covertravel to and from the meeting venue and any prior agreed travel undertaken during the course of volunteering.
* Insert name of forum will pay an agreed vehicle rate per mile. We offer a passenger rate to encourage car sharing of a return trip from pick up and drop off point of a passenger in a private.
* Public transport reimbursement will be made against a receipt.
* If for any reason a taxi is required, please make all reasonable efforts to clear this in advance with the budget manager. A receipt must be obtained.

## **Refreshments Expenses Criteria**

Refreshments will normally be provided free of charge to representatives where appropriate. This includes lunch where activities take place over lunchtime. However, there will be occasions outside of this and Insert name of forum will reimburse the cost of reasonable meals or refreshments in accordance with the following criteria:

* Necessarily absent from home and are more than 3 miles from their home.
* Away from their home for more than five hours and the period of absence covers the whole of the normal lunchtime period of 12 noon to 2.00pm or 5:30pm to 7:30pm.
* Non-alcoholic drinks may be reimbursed where the number of hours of voluntary time and participation time has exceeded 3 hours or more.
* Receipts must be provided.

## **Childcare Expenses Criteria**

* Insert name of forum will make a contribution towards childcare expenses when representing Insert name of forum.
* Childcare should only be claimed where additional childcare costs are incurred, i.e., not when immediate family members are caring for the child/young person in their own home.
* Receipts must be provided.

# **Reward and Recognition of Volunteers amount**

A reward may be offered as a token of appreciation for parent carers’ knowledge and expertise. The rate of this will be agreed in advance or insert the agreed amount.

## **Refreshment expenses**

Maximum of £x for lunch and £x for dinner.

## **Childcare expenses**

Up to a maximum of £x per hour per child, supported by receipts. A payment of up to £x per hour per child will be paid where a child requires 2 to 1 care, supported by receipts.

## **Travel Expenses**

Travel expenses will be paid at the rate of 45p per mile.

An additional 5p per mile may be claimed if car sharing per additional person.

Monitoring and review of this policy will be reviewed annually or sooner if necessary due to budgetary constraints.

**False Claims**

Any false claims made will be taken very seriously and when identified the claimant will immediately be asked to stand down from their role within Insert name of forum until the claim has been thoroughly investigated.

The claimant will be invited to a meeting to discuss the claim and will have 21 days to provide evidence that the claim is valid and to explain the claim, including provision of any additional evidence or documentation.

The meeting and investigation may result in the claimant being asked to reimburse the amount claimed (if it has been paid already); they may be asked to leave Insert name of forum and criminal proceedings may be instigated.

Each case will be looked at individually by the steering group in the first instance. An independent investigator may be asked to review the queried claim.

**Date Approved:** x 2025

**Date of next revision:** x 2026

**Responsibility of:** The Steering Group