

ADVANCE

EXPENSES GUIDELINES



Expenses Guidelines for Advance Representatives

This guide has been put together to help you understand which expenses can be reclaimed as part of your duties as a Trade Union Rep.

Expenses Policy

Advance shall reimburse any and all expenses which are detailed in, and approved in accordance with, this Policy

The aims of this Policy are:

- 1.to ensure that all expenses incurred by employees are reimbursed in a fair and timely manner;
- 2.to ensure that the Union complies with its legal and tax obligations;
- 3.to prevent corrupt practices both internally and externally including, but not limited to fraud and bribery; and
- 4.to control costs and expenses within the Union.

Claiming Expenses

Reps may claim expenses for the following approved activities only:

- 1.Travel;
- 2.Accommodation;
- 3.Subsistence;
- 4.Entertainment and hospitality;
- 5.Training;
- 6.Membership of professional bodies;
- 7.Business-related personal expenditure;

If you anticipate an expense that is not explicitly covered by this Policy or you are uncertain as to whether you would be eligible for reimbursement you should consult with the Accounts team and get prior approval from the General Secretary, Deputy General Secretary or Assistant General Secretary before making the payment and/or claiming the expense.

Entertainment and hospitality expenses and any other expenses incurred in relation to third parties who are external to the Company should be treated with care at all times in light of the requirements of the Bribery Act 2010. All Reps and associated persons must ensure that they are familiar with, and comply with, the Unions Anti-Bribery and Hospitality & Gifts Policies.

Claim forms

Claim forms, completed and authorised, together with all required receipts should be submitted to the Advance office for verification and payment.

Claim forms relating to a particular month should be presented by the 15th of the following month, (for example, if claiming for April's expenses, claims should be received by 15th May).

Claim forms can be requested from the accounts team.

Advance also uses Xero to help manage the union's finances, as such we have access to an expenses app. If you wish to make use of this facility please let the accounts team know and we can arrange a user account to be set up.

Travel & Subsistence

Rail Travel Expenses

For all journeys standard / second class should be used.

Air Travel Expenses

Air travel within the UK shall be permitted only where the destination is not part of the UK mainland (e.g. Northern Ireland), or where air travel is cheaper than the equivalent permitted rail fare.

For all flights outside the UK or those beginning within the UK and ending outside the UK the following rules apply:

1. All bookings must be approved with the General Secretary.
2. For all journeys less than 6 hours economy class should be used;
3. For all journeys exceeding 7 hours business class (or equivalent) may be used

Car Travel Expenses

The following mileage rates shall apply to all Reps:

First 10,000 Miles in a tax year	45p / mile
Miles over 10,000 in a tax year	25p / mile

Reps shall at all times pay for private journeys.

Reps may not claim for mileage incurred on journeys to or from their home and normal place of work.

Under no circumstances will the Union pay any fines arising out of any Road Traffic Act offences.

Accommodation

The Union shall reimburse Reps for the reasonable costs of overnight accommodation.

Subsistence

Reasonable subsistence may be claimed for overnight stays. No set limits apply to claims for meals, however reps are expected to adopt a common-sense approach to such costs and the Union will not reimburse employees for any such costs which are deemed to be extravagant or unnecessary.

Reasonable subsistence may be claimed for occasions where a rep is working away from their normal place of work but not on an overnight stay. The following criteria must be satisfied in order for such claims to be made:

1. The rep must be away from their normal place of work for at least 5 hours.
2. For breakfast expense claims, the rep must have started their journey before 7:00 AM
3. For evening meal expense claims, the employee must still be at the location at which they are working for work purposes after 18:30.

For subsistence claims no set limits apply to claims for meals, however employees are expected to adopt a common-sense approach to such costs and the Union will not reimburse reps for any such costs which are deemed to be extravagant or unnecessary.

All claims for the costs of subsistence must be supported with full receipts.

Entertainment and Hospitality Expenses

The Union shall reimburse entertainment and hospitality expenses provided such claims:

1. are for reasonable entertainment and/or hospitality which is not excessive, is otherwise commensurate with the practices of other businesses in our sector, and is in compliance with the Company's Gifts & Hospitality Policy and its Anti-Bribery Policy;
2. clearly state a valid business purpose for the entertainment and/or hospitality;
3. detail the time, date, and location of the event and/or hospitality;

Where more than one Rep is present it shall be the responsibility of the most senior Rep present to pay any and all bills.

The Union shall be responsible for bearing the tax liability for all Staff Entertainment including in-house lunches and other reasonable Staff Entertainment (subject to the exception of the staff Christmas party which shall incur no tax liability up to an average of £150 per person. The Union shall bear the tax liability of any costs exceeding that level).

Training

The Union shall reimburse (or pay for in advance, as appropriate) the costs of any authorised training which is relevant to a given Reps role.

The costs of travel and accommodation related to any such training shall be governed by the normal rules relating to business travel and accommodation set out in the above sections.

Personal Expenditure for Work Purposes

Reasonable telephone calls made for business purposes using an Reps personal telephone shall be reimbursed by the Union on submission by the Rep of the relevant telephone bill.

Reasonable personal expenditure on equipment for business purposes shall be reimbursed by the Union provided such expenditure receives the prior approval.

Please direct expense queries and claim forms to:

accounts@advance-union.org

