MUNICIPAL & OWEN CARTER
ALMSHOUSE CHARITY

Mileage and Travel Expenses Policy

1. Purpose of the Policy

This policy sets out how trustees, staff, and volunteers of the almshouse charity may claim reimbursement for mileage and travel expenses incurred while carrying out authorised charity business. Its aim is to ensure fairness, transparency, and compliance with UK charity and HMRC requirements.

2. Scope

This policy applies to:

- Trustees
- Employees
- Volunteers
- Contractors or advisors where travel reimbursement has been agreed in advance

It covers travel undertaken **solely for legitimate charity purposes**, including:

- Attending trustee meetings, training, or governance events
- Visiting residents or properties for operational reasons
- Collecting supplies or equipment for the charity
- Attending external meetings, inspections, or regulatory appointments
- Any other activity formally approved by the Chair, Clerk, or Manager

3. General Principles

- All travel must be **necessary, reasonable, and cost-effective**.
- Public transport should be used where practical and economical.
- Claims must be supported by receipts (except mileage).
- Claims must be submitted within **three months** of the travel date.
- No individual should be financially disadvantaged for carrying out approved charity duties.
- The charity will not reimburse travel related to personal errands, commuting, or mixed-purpose journeys unless the charitable element is clearly identifiable.

4. Mileage Allowance

Mileage may be claimed when a personal vehicle is used for authorised charity business.

4.1 Approved Mileage Rates

The charity follows HMRC's Approved Mileage Allowance Payments (AMAP) rates:

- **Cars and vans:** 45p per mile for the first 10,000 miles per tax year; 25p per mile thereafter
- **Motorcycles:** 24p per mile
- **Bicycles:** 20p per mile

If HMRC rates change, the charity will adopt the updated rates automatically.

4.2 Conditions for Claiming Mileage

- Mileage must be calculated from the **shortest reasonable route**.
- Normal commuting to a regular place of work cannot be claimed.
- If a journey includes personal stops, only the charity-related portion is claimable.
- Claimants must ensure their vehicle is **roadworthy, insured, taxed, and MOT-compliant**. The charity does not accept liability for personal vehicle use.

5. Other Travel Expenses

The charity will reimburse reasonable and necessary travel costs, including:

5.1 Public Transport

- Standard-class fares only
- Tickets should be booked in advance where possible
- Receipts or e-tickets must be provided

5.2 Taxis

- Permitted only when public transport is impractical, unsafe, or significantly time-inefficient
- Must be justified on the claim form

5.3 Parking and Tolls

- Reimbursable with receipts
- The charity does **not** reimburse parking fines, speeding penalties, or other enforcement charges

5.4 Accommodation and Meals

These should be rare for an almshouse charity but may be reimbursed if on a charity approved training or seminar course:

- Pre-approved by the Chair or Manager
- Costs are reasonable and supported by receipts
- Alcohol is not claimed

6. Claiming Process

6.1 Submitting a Claim

Claimants must:

- Complete the charity's Travel & Expenses Claim Form
- Provide receipts for all non-mileage expenses
- Submit claims within **three months** of travel
- Obtain approval from the appropriate authorising officer (e.g., Chair, Clerk, Manager)

6.2 Authorisation

- Trustees' claims must be authorised by the Chair or Clerk
- Staff claims must be authorised by the Chair or Clerk
- Volunteer claims must be authorised by the Clerk

6.3 Payment

- Claims will normally be reimbursed via bank transfer
- Payments are processed within the charity's standard financial cycle

7. Fraud and Misuse

Submitting false or inflated claims is considered a serious breach of trust. Any suspected misuse will be investigated in line with the charity's disciplinary or governance procedures and may be reported to the Charity Commission if required.