



Dog A.I.D. Expenses Policy

Dog A.I.D. wants to ensure that trainers, staff, trustees and volunteers are not out-of-pocket for the work they do for us, while also looking to get the best use of limited funds. Our work would not be possible without the dedication of our volunteers - as trainers, assessors, trustees and helping with fundraising and support.

We want to encourage all volunteers to claim expenses where appropriate. When volunteers claim the expenses needed to do their work, it helps Dog A.I.D. to show the full costs of providing our services. We understand that some volunteers choose not to as part of their support of the charity and thank them for their generosity. It is important that all volunteers know how to claim expenses and how much we value their work for Dog A.I.D.

HM Revenue & Customs expenses and benefits rules recognise that reimbursement of standard business expenses (such as travel) are not taxable. Dog A.I.D.'s policy is guided by these rules and we do not pay expenses that will give rise to tax or National Insurance.

In order to comply, any amounts claimed must be for actual costs that is incurred wholly, necessarily and exclusively in connection with authorised duties that an individual undertakes in the course of their role for Dog A.I.D., and that adequate records are submitted with each claim.

General rules

- Expenditure incurred by trainers, staff, trustees or other volunteers should be necessary to achieve our goals and represent good value to our beneficiaries and supporters.
- Each staff member, trainer, volunteer and trustee are responsible for familiarising themselves with these rules and understanding the limits of their authority, as Dog A.I.D. may not reimburse any expenses considered unreasonable or outside this guidance.
- All expenses should be itemised, with supporting receipts attached, on Dog A.I.D. claim forms
- Expenses with no supporting receipt require a signed letter by the staff member or volunteer explaining the purpose of the expense and the reason why a receipt is not provided. Dog A.I.D. may decline to reimburse an expense claimed with no supporting receipt.

Eligible expenses

The specific rules for eligible expenses that may be claimed by trainers, staff, trustees or other Dog A.I.D. volunteers are listed and described below:

Public transport fares

Expenses associated with public transport such as trains, buses, underground and short haul flights within Europe are eligible for expenses claims. We encourage anyone claiming expenses to try and find the most cost-effective method possible, without putting their safety or wellbeing at risk.



Use of personal vehicle

Staff, trainers, volunteers and trustees may use their own vehicles for business travel if they wish, at their own risk. Where practicable, people should travel together to minimise costs. Where any Dog A.I.D. representative is using his or her vehicle for business purposes, the vehicle must have an in-date MOT certificate, be fully taxed vehicle and insured for business use. Current mileage allowance rates are as follows:

£0.45 per mile (£0.35 if using a Motability vehicle)

Parking fees, congestion and toll charges will be met by Dog A.I.D., but not parking fines.

Taxis

The cost of travel by taxi will be reimbursed in the following circumstances:

- There is no reasonable or practical alternative to getting to the destination.
- The staff member has been required to work so early or late, that public transport is not reliably available, or the individual's safety is compromised.
- A 'heavy load' is being transported, which would be unreasonable to carry on public transport.
- The individual has a disability such that public transport is not appropriate.
- The reason why the staff member has chosen to travel by taxi must be described in the expenses claim form, and a receipt provided showing the date, place of departure and destination.

Subsistence

The reasonable cost of meals purchased while staff are working at a temporary workplace or while travelling within the UK and abroad will be reimbursed by Dog A.I.D. Please note that the costs of buying meals for colleagues (other than when both parties are travelling on Dog A.I.D. business) may not be claimed.

Overnight accommodation

Reasonable costs for overnight accommodation will be reimbursed where it is necessary for Dog A.I.D. staff or volunteers to perform their duties away from their usual workplace. For example, overnight accommodation required in attendance at workshops.

Trustee expenses:

Please refer to www.gov.uk/guidance/payments-to-charity-trustees-what-the-rules-are

- Travel to/from Board of Trustees meetings (includes cars, trains, bus, parking and travel at 45p per mile or 35p if using a Motability vehicle)
- Travel to/from other trustee business (includes cars, trains, bus, parking and travel at 45p per mile or 35p if using a Motability vehicle)
- Accommodation (one night) for trustees who travel more than two hours to attend a Board of Trustees meeting and have physical difficulties in doing the return journey in one day



- Accommodation for any other trustee business should be confirmed with the Chair and/or Treasurer.

Trainer expenses:

- DBS postage, special delivery
- Travel expenses to/from clients
- Travel expenses to and from trainer workshops and client and trainer workshops @ 20p per mile (contribution to fuel costs)
- Annual re-assessment (includes cars, trains, bus, parking at 45p per mile or 35p if using a Motability vehicle)
- up to £5 for refreshments for training or assessing on a 'long down stay'

Assessor expenses:

- Travel expenses for Level 2 and 3 assessments (includes cars, trains, bus, parking and travel at 45p per mile or 35p if using a Motability vehicle)
- £50 claim for Level 2 and 3 assessments (does not include Level 1 or annual re-assessments)
- Up to £10 for refreshments for assessing on a 'long down stay'

Making claims

- All claims for travel and subsistence expenses, from Trainers, trustees, staff and volunteers, must be completed on the appropriate form (example(s) below)
- Claims by trainers, staff and volunteers should be authorised by the Treasurer, Finance Officer or Chair
- Claims by trustees should be authorised by the Chair
- Claims by staff members should be submitted monthly and will be paid along with the monthly pay run.
- Claims by trainers, volunteers and trustees can be when required. Expenses should normally be claimed within two months of the activity as this helps us to plan and keep track of funds. However, where volunteers build up expenses through smaller amounts incrementally, they can be submitted every three or six months.
- Claims will be paid within ten working days of a claim being authorised, via BACS



Dog AID Trainer Expense Claim Form

Please send any receipts (other than fuel) to Charlie Evans, Dog A.I.D. Office: Earlyworld House, 7 Darwin Court, Oxon Business Park, Shrewsbury SY3 5AL or bookkeeping@dogaid.org.uk

Note: Please **do not take cash** from your clients as a paper trail is needed for the accounts. Cheques you receive from your clients should be made payable to 'Dog A.I.D.' and posted with your expense form to the Finance Officer as above. Alternatively, your clients can pay direct into our CAF account using their **Surname/Dog's name** as a reference: Sort Code 40-52-40, Account number 00018390.

Trainers Name:

Bank Account Name:

Bank Account Number:

Sort Code:

Address for payment by cheque:

Contact details in case of a query:

Please mark X against items you are claiming for, give as much information about the claim as possible including the total amount for each box, and the grand total at the bottom.

CLAIM	Detail of Expense (Please include date, postcode-postcode and distance for travel claims)	X	Amount
TRAINING			
DBS documents postage			
Travel to/from clients. (includes travel @ 45p per mile or 35p if using Motability vehicle, train, bus, parking)			
Up to £5 for refreshments when training 'long down stay'			
Hall hire for Dog A.I.D. classes			
ASSESSMENTS			
Travel expenses for Level 1, 2 and 3 assessments and annual re-assessment (includes travel @ 45p per mile or 35p if using a Motability vehicle, train, bus, parking)			
£50 claim for Level 2 & 3 assessments (does not include Level 1 or annual re-assessment)			
Up to £10 for refreshments for assessing 'long down stay'			
WORKSHOPS			
Travel expenses to/from trainer or trainer/client workshops (includes fuel @ 20p per mile, train, bus, parking)			
TOTAL CLAIM AMOUNT			



Mileage Record Sheet

Name:

Vehicle Reg:

Month/Year:

IF OWN VEHICLE - PLEASE COMPLETE THIS SECTION

Date of Journey	From/To	Details of Duties Performed	Total Miles

Total Claimed: miles @ 0.45p per mile = £....