

# Travel and Accommodation Expenses Policy For Macmillan Professionals 2020

## 1. Introduction

Macmillan provides a wide range of learning and development opportunities for all Macmillan professionals to support you in your role and with your professional development. We provide these programmes free of charge as we know that training budgets are limited and we want to ensure everyone is able to access the learning we offer.

Accordingly, we ask that you claim any expenses incurred in attending Macmillan learning from your employer in the first instance.

## 2. Principles

- Macmillan is only able to support expenses claims because of our supporters' donations and fundraising work.
- You should aim to keep costs to a minimum by attending a local course or conference where possible to ensure the effective use of charitable funds.
- Any claims which fall outside the limits of this policy will be declined. You are responsible for ensuring you have read and understood this policy before submitting any claim.
- If you are unsure whether your claim meets the requirements of this policy, you should seek advice from your Macmillan contact prior to making any arrangements.

If your claim is approved, we will meet the cost of your travel as outlined in point 5. However, in order to minimise the cost to the charity, it is expected that you will:

- Where appropriate, consider the use of telephone or video conferencing alternatives to attendance
- Ask your employer to cover the costs incurred and only claim from Macmillan where this is not successful
- Choose the most local event (where there is a choice of similar events)

## 3. Who can apply?

Macmillan professionals only. We are not responsible for the expenses of non-Macmillan professionals or friends and family members and you can only claim expenses on your own behalf.

## 4. What Macmillan will pay for?

Where your employer is unable to cover the cost of travel/accommodation expenses, Macmillan will consider reimbursing you for attendance at the following:

- Influencing and partnership working with Macmillan: e.g. policy consultation/focus group/project group work
- Learning and Development Events & Courses
  - Courses that are a mandatory requirement for your Macmillan role: e.g. We are Macmillan induction day
  - Events and courses **provided by Macmillan**: e.g. Any event and or course offered by Macmillan, either nationally, regionally or profession specific, including communities of practice/influence

- Learning and Development Grants (Individual grants only, not group grants)
  - Attendance at any conference or learning programme which has been funded via a Macmillan Learning and Development grant. [You may apply only after your grant has been approved.](#)

## 5. How much can I apply for?

We will provide the following levels of support:

Activity	Travel (see note 1 below)	Accommodation/Subsistence
Influencing and Partnership Work	Reimbursed up to £250 per year	Maximum of 4 nights per year  Reimbursed up to rates below (see note 2)
Mandatory Course Attendance	Reimbursed up to £250 per year	Maximum of 1 night per 1 day course, up to 2 nights per year  Reimbursed up to rates below (see note 2)
Macmillan Courses and Events (To include the National conferences)	Funding will be provided to support attendance at Macmillan courses/events up to a maximum of £250 per course/event and a maximum of £500 per year in total.	Maximum of: 1 night per 1 day course or event 2 nights per 2 day course or event (Excluding nights covered in an event/courses package)  Reimbursed up to rates below (see note 2)
Learning and Development Grants (Individual only)	Up to £250 per individual grant per year and a maximum of £500 per year in total.	Up to 2 nights per grant and a maximum of 4 nights for grants per year  Reimbursed up to rates below (see note 2)

### Travel (note 1)

If you're unable to plan your travel within the limits above, please contact your Macmillan contact for advice. To minimise the cost to the charity, it is expected that you will:

- Plan travel as far in advance as possible and choose the most cost-effective method. Please note that open return train tickets will not be reimbursed as these are usually the most expensive option. First class travel is not permitted. Note that Macmillan cannot cover avoidable booking or exchange fees, e.g. for bookings via trainline.com
- **The use of taxis will only be considered in exceptional circumstances where approved by your Macmillan contact in advance and cheaper than public transport**
- If you drive, the following rate will apply: 45p per mile. Please provide the 'to' and 'from' postcodes of your travel to support your mileage claim and explain why you were not able to use public transport.

### Accommodation/Subsistence (note 2)

Where one-way travel time to an event complying with the criteria above exceeds 3 hours, or transport timetables constrain arrival/departure times, we will consider paying for accommodation for a maximum of 1 night per full day of the event. Breakfast must be included in the overnight tariffs outlined below.

You will also be able to claim for dinner (when you are required to stay away from home overnight) **or** an evening snack (where you will not return home until at least 21.30 hours and have been away from your place of work for over 5 hours) up to the limits shown. These are the maximum rates. Please aim to find the cheapest options possible.

	<b>London</b>	<b>Outside London</b>
<b>Accommodation</b>	£130	£92
<b>Dinner</b>	£20.00	£17.50
<b>Evening Snack</b>	£12.50	£10.00

**Please note that alcohol is not an allowable expense. If purchasing alcohol, please ensure this is on a separate receipt.**

In order to minimise the cost to the charity, it is expected that you will:

- Consider alternatives to staying in a hotel e.g. staying with local friends/relatives where possible. You may claim up to £25 in order to offer a gift to your host or buy a meal. You may only claim for actual expenditure. Receipts are required in support of the claim and you must confirm that the overnight stay was necessary in connection with travelling on Macmillan business. No further subsistence claims should be submitted in relation to this stay.
- Choose good value accommodation. You are responsible for any costs above the limits set out above.

## **6. How do I make an application?**

- Complete your copy of the Macmillan Professional Expenses claim form and return it with the **tickets / booking confirmation / receipts** (these may be scanned copies as long as the details are clear) within 1 month of the date of the event. Receipts must be itemized so it's clear what you are claiming for.
  - Travel: tickets should show journey details, date and time and cost.
  - Accommodation: Breakdown of costs incurred.
  - Please note that credit/debit card or collection receipts will not be accepted, as these do not include the details needed.
- Where you have shared costs with others (e.g. shared accommodation or booked travel together) each person must submit their own claim for their share with the relevant receipts. You may use the same receipts as long as your share is detailed in relation to these.
- You will only be reimbursed if successful once you have attended the activity.
- If your claim form is **not approved**, you will be told the reason why. If you are unsure whether your claim meets the criteria outlined above, please speak to your Macmillan contact before applying.

## **7. What do I do if expenses are included in an event's package?**

- Where expenses are included in a Macmillan event's package, the claim form may be completed and handed in at the event or returned with the **original tickets / receipts to the event organiser** within 1 month of the date of the event.

## **8. How will my expenses be reimbursed?**

- Claims must be made as soon as possible after the expenditure takes place and Macmillan reserves the right to refuse payment of expenses for claims older than 6 months.
- Payment will be made by BACS transfer. Instructions for how to do this can be found on the claim forms.
- You may choose to be paid by personal cheque, however BACS is preferred to reduce delays. These will be posted to your nominated address. After 6 months' cheques not cashed will be cancelled and no replacement will be issued.
- Payment will not be made to any individual other than the claimant
- Payment will not be made to any employing organisation