

BUSINESS TRAVEL AND EXPENSES POLICY

Basic Principles

The Faculty of Occupational Medicine (FOM) is very fortunate in that many members, as well as colleagues outside the organisation, work on its behalf, often on a voluntary basis. For such work we shall meet actual expenses incurred. Expense claims should be submitted within three weeks of the event, and accompanied by supporting receipts or other appropriate documentation. Reimbursement of expenses will usually be within 2-3 weeks of receipt of the completed claim form. Please note that claims which are not in accordance with these rules may not be paid.

Travel: Our charitable resources are limited. Travel undertaken on FOM business should always be made by the most economical means and route consistent with practicality. If travel is multipurpose, only the appropriate portion should be claimed. Travel outside the United Kingdom must be authorised in advance by the Treasurer via the Head of Finance and Membership.

For certain events e.g. examiner training days, bookings can be made through the Executive Secretary. Delegates are actively encouraged to use this facility for these events as experience has shown that we can save a considerable amount of money this way. Where it is applicable, this offer will be made in the initial booking correspondence for the event.

The following guidelines apply to different modes of transport.

Air: For journeys by air, standard/economy class should be used. Early bookings should be made whenever possible to take advantage of discounted fares. The most cost effective carrier should be booked.

Rail: Standard class with a fixed return date and time (i.e. non open return) is to be booked for all rail journeys and advantage should be taken of early booking discounts and off peak travel tickets where practicable. Please remember, booking tickets on the day of travel will cost the FOM considerably more money than booking in advance. If economy advance tickets are purchased and the date of the meeting changes, we shall refund the cost of the economy advance ticket. The cost of any seat reservations and evening meal necessarily taken on the train will be reimbursed when receipts are provided. **We are happy to book your travel for you.**

First Class: First class travel will not be reimbursed. If first class travel is purchased, only the cost of a standard class ticket with a fixed return date and time will be reimbursed. The exception to this is when first class travel is cheaper than or similar to standard class. Occasionally, the FOM may waive this rule if the journey is exceptionally long or when circumstances prevail. This is entirely at our discretion and only by prior arrangement, not after the fact.

Road: Mileage (45p/mile) may be claimed for travel in connection with FOM business. The most practical route must be used for all journeys. In addition to the appropriate rate of mileage, garaging, parking fees and tolls will be reimbursed. Receipts should be obtained wherever possible.

(Please note, driving and parking fines and penalties will not be reimbursed. Drivers must ensure that their personal car insurance covers business use and the FOM may request to see evidence of this from the insurance company.)

Taxis: It is occasionally necessary to use a taxi, but this should be done exceptionally. Taxis are sometimes used when time of travel, nature of journey, personal safety or accompanying luggage make it necessary to do so. Where possible, taxis should be pre-booked. Please provide receipts for all journeys.

Overnight Accommodation: Overnight subsistence may be claimed when it is impractical for the claimant to travel home. Usually this is when the claimant is required to attend a meeting or examination on sequential days, or when the start or end time of the event and travel time make it sensible to do so. Reasonable subsistence claims will be reimbursed (see below).

(In order for us to optimise our VAT return, claimants for overnight stays should ask either for the hotel invoice to be sent to the FOM, or if paying themselves, for the invoice to be made out to them, but at the FOM's address.)

The actual, reasonable receipted costs of hotel accommodation, breakfast and evening meal (table d'hôte, hotel restaurant or equivalent) may be claimed. Personal expenditure such as bar bills, videos and newspapers will not be reimbursed. Based on current hotel rates, total costs (including VAT) should not exceed a limit of £120 per night (£160 in London) and in the majority of cases should be less. Justifiable expenses may be claimed e.g. WiFi access charges or business telephone calls. These costs will not count towards the overall cost limit.

The FOM has an agreed rate with the Grange Holborn hotel group for stays in London, please contact the Executive Secretary to make a booking.

President's expenses: It is recognised that there is sometimes a need for the President to incur expenses in her or his duty to meet the objectives of our charitable aims. There is a provision for this in the budget and the level is agreed annually by the Board of Trustees. The President should agree plans for travel and expenses with the Chief Executive.

Entertainment: The Board of Trustees is legally responsible for ensuring that our charitable funds are properly used. They are publicly accountable and have legal duties and responsibilities under charity law to safeguard the FOM, its funds and property. Entertainment of colleagues, guests or business contacts at the charity's expense is not normally allowable. Any requests to provide hospitality in this way must be approved in advance and in writing by the Treasurer, the Head of Finance and Membership and the Chief Executive.

Audit and Review

All travel and subsistence claims are subject to scrutiny by the FOM's auditors.

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