

NJR EXPENSE POLICY

INTRODUCTION

The NJR recognises that NJR Steering Committee and sub-committee members [including co-opted members who have been invited to participate because of a particular expertise or knowledge base or as a relevant stakeholder representative] may incur expenditure in carrying out activities for the NJR. The individual should not have to bear these costs, however reimbursement should not leave the individual better off.

As the NJR is largely financed by public funds, we must seek best value for money at all times and minimise costs wherever possible. Travel and subsistence claims, as is all NJR expenditure, are met from public funds, and attract public attention. Therefore it is imperative that there is full compliance with this policy and that claims are processed in a consistent and effective manner. All those travelling on NJR business, and making claims under this policy are expected to make claims only in respect of costs properly incurred. Claimants should be aware that travel and expenses claims are disclosable under Section 12 of the Freedom of Information Act.

1. CLAIM GUIDELINES

- Expenses will only be reimbursed if they are claimed in line with this policy.
- The NJR will only accept expense claims relating to expenses incurred through attendance at NJR committee meetings, and NJR events.
- Attendance at non NJR meetings/events: Claims relating to expenses incurred through attendance at non-NJR meetings or events, for NJR business related activity, or to represent the NJR, will only be accepted if prior NJR approval has been sought and granted and where the claim is not funded by any other source.
- Orthopaedic Specialist Society representation: Expenses incurred by NJR committee members who have been co-opted to represent the Specialist Orthopaedic Societies, will be shared equally on a 50/50 basis between the NJR and the relevant Society. Reimbursement of the expense claim will be made by the NJR to the value of 50% of the total claim. The claimant should claim the remaining 50% from the Specialist Society represented by the individual.

2. GENERAL GUIDANCE: COMPLETING AN EXPENSE FORM

- To make a claim, an expense form must be completed. Copies are found via (<http://www.njrcentre.org.uk/njrcentre/AbouttheNJR/Howweoperate/NJRpolicies/tabid/1462/Default.aspx>);
- The form can be completed electronically or in hard copy;
- Original receipts and/or supporting documents must be attached to the expenses form. Photocopies or faxed copies will not be acceptable.

- Claim forms must be signed by the claimant. This responsibility cannot be delegated unless there are extenuating circumstances and this has been agreed by the NJR;
- It is recommended that individuals retain copied documentation for their personal records;
- All charges, including online charges such as those made via Apple Pay, contactless payment, or SMS, will require a receipt or statement as evidence;
- Expenses should be claimed within two months of incurring the expense. Later claims will only be accepted in extenuating circumstances and by referral to NJR@njr.org.uk;
- If there are extenuating circumstances relating to a claim that falls outside of the guidance set out in this policy, this should be discussed with NJR and agreed prior to incurring the expense;
- For any queries relating to special circumstances, email (NJR@njr.org.uk);
- Claims will be processed on the 15th of each month and payment made by BACS transfer to the account the claimant has named on the expense form, by the end of that same month;
- Any attempt to falsify an expense claim will be considered to be gross misconduct and appropriate action will be taken against the claimant.
- Send completed claim forms with receipts and supporting documentation to:

**NJR Centre, Northgate Public Services
Peoplebuilding 2, Maylands Avenue
Hemel Hempstead, HP2 4NW**

3. EXPENDITURE WHICH MAY BE CLAIMED

The NJR will reimburse authorised expenses relating to

- Public Transport (Train, tube, Bus, tram)
- Air travel
- Private Transport – Including car parking
- Taxi
- Hotel Accommodation
- Subsistence

The majority of committee or meeting/event dates are provided in advance and as such travel tickets (air, train, or other(s)) related to travel for NJR business should be planned and purchased in advance wherever possible in order to obtain best value for the NJR. Any other foreseen costs [e.g. hotel reservations] must be communicated to the NJR for approval in advance of the reservation/cost being confirmed.

3.1 TRANSPORT

Where travel is necessary, the preferred mode of transport for NJR activity is public transport.

3.1.1 Class of Travel

Claimants should use the most cost effective mode of transport possible and are normally expected to travel standard class by train and economy class by air. Guidelines for purchasing non standard fare

tickets are detailed in 3.1.2. All claimants should actively seek value for money where practical by booking advanced tickets and using discount cards and railcards alongside the advanced standard fare where possible which can produce further savings.

3.1.2 Guidance for purchasing non-economy travel tickets.

3.1.2.1 Train Travel

- The NJR will reimburse travel costs **UP TO** the cost of a standard (2nd class) open return ticket (including any discounts from railcards).
- Reimbursement of non-economy travel expenses will be on the provision of verification obtained at the point of purchase ; for example; a screen shot **taken on the day of purchase** showing the comparable prices of **both** classes of travel which should be attached to the expenses claim form.
- If supporting evidence is not supplied with the claim form, reimbursement will be made at the online standard fare rate published at the time of processing the claim OR the price of the submitted 1st class ticket, whichever is the cheaper.
- The NJR would encourage individuals to further reduce costs by purchasing advanced tickets where practical (this can be for any class as long as the total does not exceed the cost of a standard open return).
- Travellers are welcome to upgrade from standard to premium economy, business or first class (or use of personal reward miles) but the NJR will not reimburse costs that exceed the cost of a standard open return ticket, though the claimant will be reimbursed up to that cost and may pay the difference for themselves.
- Most trains include free Wi-Fi as standard; however, in the situation where free Wi-Fi is not available in a standard fare carriage, and for journeys in excess of 2 hours, NJR will refund the cost of the daily Wi-Fi rate for that train. Receipts must be provided.

3.1.2.2. Air travel

- **First class air travel is NOT permitted.**
- Business class travel is only permitted for air journeys in excess of six hours or in very exceptional circumstances, such as where there are no suitable economy class facilities to accommodate disabled or other special needs requirements.
- All cases of air travel above standard class must be approved by the NJR Director of Operations or NJR Steering Committee Chairman and a record of the approval should be retained and submitted as supporting documentation as this may be subject to public scrutiny.

3.1.3 Public Transport

- Tickets should always be procured as economically as possible;
- The NJR will cover up to the cost of standard-class travel or the cheapest fare available;
- In London, Oyster cards are often the cheapest way to travel. If using an Oyster card for travel, please include a print out of your journey with your expenses form;
- Claims for contactless cards or other pre-paid travel options: similarly to Oyster, please include print outs of bank statements or journey details with expenses form ;
- Claimants may not claim for the Oyster card deposit or top up charges ;
- NJR will not be liable for any invalid tickets which were purchased by the claimant unless NJR directed those tickets to be bought ;
- Where meetings have been cancelled by NJR and the claimant is unable to receive a full or partial refund from the rail operator, NJR will cover the cost of any loss experienced in purchasing the ticket.

3.1.4 Taxis

- Taxis should only be used where there is no suitable public transport /or there are accessibility reasons/or there is a group travelling and a taxi will be cheaper;

3.1.5 Private transport

- The NJR encourages the use of public transport where possible, but where the use of a car is cheaper for the claimant, and where agreed in advance with NJR, mileage will be covered at £0.56 per mile. Please retain receipts for petrol purchased during journeys made to NJR meetings;
- Claimants using their own vehicles for activity on behalf of the NJR must hold a current driving licence, have necessary tax and MOT certificates, insurance cover and the vehicle must be roadworthy;
- Speeding, parking and any other traffic infringement fines, including fines for non-payment of the congestion charge, will not be reimbursed;
- The NJR does not accept liability for damage caused to or loss of private vehicles or their contents whilst being used on NJR activity or liability for claims by passengers or third parties, nor will the NJR reimburse for the loss of no-claims discounts or insurance excesses;
- Parking near to venues and stations for the duration of events, meetings and other agreed activities will be covered. Overnight parking will not be covered unless agreed as essential.

3.1.6 Air travel

See 3.1.2.2 for non standard air fare guidance;

- The NJR will only cover the cost of standard/economy-class air travel under the following circumstances and this must be previously agreed with the NJR:

- That a member or co-opted member has been approved to represent the NJR at an international event;
- The member is travelling to or from outside England;
- Time does not allow for another form of travel;
- Air travel is cheaper than other alternatives (rail, bus, and car).

3.2 HOTEL ACCOMODATION

Occasionally you may need overnight accommodation. Hotel accommodation can be claimed under the following circumstances and must be previously agreed with the NJR in advance of booking:

- When an NJR meeting extends over two days and agreed attendance is for more than one day;
- If the journey to the meeting/event where your departure from home or arrival back at home would otherwise be before 6am or after 10pm;
- Where the cost of travelling exceeds the cost of accommodation;
- Your claim for each night(s) accommodation must be no more than £100 per night outside London and no more than £150 per night within London

3.3 SUBSISTENCE

- A maximum expenditure of £25 per day will be reimbursed [if meals/refreshments are not otherwise provided at the meeting /event or already included in the cost of the hotel];
- The NJR will not cover the cost of alcoholic drinks;
- All claims must be receipted and itemised.

3.4 MISCELLANEOUS ITEMS

- The NJR will not normally cover claims outside of the categories listed above. However, in exceptional circumstances it may be possible to claim for other expenditure which is essential to the completion of your duties in association with the NJR. These costs, e.g. telephone calls, must be as cost-effective as possible and previously agreed with the NJR on a case by case basis – additional costs should be avoided where possible e.g. by using free online communication tools;
- Items should be listed under ‘Miscellaneous’ and details and receipts must be provided;
- The NJR will be flexible in considering the needs of claimants with disabilities.
- Any queries about claims can be submitted to njr@njr.org.uk

3.5 CANCELLATIONS/REFUNDS

The NJR will not be liable for any invalid costs which were incurred by the claimant unless the NJR directed those costs to be incurred. For example, where meetings have been cancelled by the NJR and the claimant is unable to receive a full or partial refund for a travel ticket or other cost, the NJR will cover the cost of any loss made by the claimant.

Refunds in extenuating circumstances e.g. sickness will be reviewed on a case by case basis.

3.6 FOREIGN CURRENCY

Where currencies other than GBP are being claimed, please provide proof of exchange rate e.g. credit card statement/currency exchange bureau receipt. If this is not provided then the applicable rate published on <http://www.xe.com/currencytables/> on the date the charge was incurred will be used.

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