



Travel and Expenses Policy

Policy Summary

This Policy outlines the key principles and rules relating to travel and subsistence. It also describes the responsibilities of our Staff, Volunteers and Delegates ensuring the money the British Red Cross spends on travel and business expenses is both necessary and reasonable.

Policy Owner	Chief People Officer
Policy Lead	Director of Financial Accounting and Corporate Services
Audience	All Staff, Delegates and Volunteers
Legislation and regulation	Her Majesty Revenue and Customs (VAT, Mileage Allowance Payments) Health and Safety (Duty of Care)
Formally endorsed by	Executive Leadership Team
Endorsement date	May 2021
Next review	May 2024

1 Introduction

- 1.1 This Policy sets out your obligations when travelling on official business. All Staff and Volunteers are responsible for understanding and adhering to the principles of the policy. Our commitment to following this Policy and only travelling when essential, will allow the British Red Cross (BRC) to make the best use of charitable funds.
- 1.2 The BRC is a global humanitarian organisation, therefore our business travel has a significant impact on the environment. Our Green Policy requires that when booking travel, the most carbon efficient mode of travel should be used where possible.
- 1.3 Our people's health, wellbeing, and safety are of high importance. By reducing our travel where possible, this allows for a better (quality) work/life balance and promotes both flexibility and inclusivity.
- 1.4 This Policy should be read and understood prior to incurring any expenses. Failure to comply may result in expenses not being reimbursed and/or disciplinary action.

2 Policy Statement

- 2.1 Before incurring any expenses and/or booking travel, travellers should ask themselves “Do I need to make this journey? Is it essential?” This enables the BRC to support wellbeing through reduced travel; reduce its carbon emission(s); and save money, ensuring our funds are directed to support people in crisis.
- 2.2 The BRC expects our people to promote the effective use of resources by using virtual technology to connect with colleagues and external partners where it is effective and efficient to do so. Business travel should only occur by exception and where remote access tools are not available.
- 2.3 Managers, staff and volunteers should feel empowered to make decisions and judgements where reasonable travel is required that is outside of delivering essential services of the BRC. Further [guidance](#) on essential and non-essential travel can be found on RedRoom.

3 Key Principles

This Policy summarises the key principles we must commit to when arranging travel. Further guidance to support all types of travel and expense categories and what can and cannot be claimed for can be found on RedRoom.

- 3.1 Essential travel, for example: delivering a frontline service; deployments overseas; fundraising activities; onboarding a new staff or volunteer member; and wellbeing or support meetings should continue but good judgement must be used when arranging travel to ensure good use of charitable funds and impact on the environment.
- 3.2 All non-essential travel must be both discussed with and approved by your line manager. This can be agreed in advance for specific events or discussed when ad-hoc travel requirements occur. All travellers and line managers will be held accountable for adhering to essential / non-essential [guidance](#).
- 3.3 Whilst travelling, our people should expect to receive service and accommodation that are safe and comfortable, whilst ensuring all costs are reasonable and justifiable.
- 3.4 Internal meetings and workshops should be held virtually where practicably possible, including meetings with external partners.
- 3.5 Internal training courses must be completed using Microsoft Zoom or online e-learning where available, including induction and mandatory training courses. Travel is only permitted where a training course requires face-to-face attendance.
- 3.6 Where possible, off-peak travel should be booked to allow for the cheapest fare. However, travellers should also consider the total cost of their (essential) journey, taking into consideration meeting/training times and impact on work/life balance.

- 3.7 Where a face-to-face meeting is essential, meeting organisers must confirm meeting invites a minimum of 21 days in advance where this requires travel to a venue, enabling participants to book travel within approved lead times.
- 3.8 All travel and accommodation should be booked as far in advance as possible - but must be booked a minimum of 14 days in advance to ensure the BRC receives the lowest priced fares. This applies to all modes of transport and accommodation.
- 3.9 All travel booked outside the lead times stated in Para 3.8 must be for **essential** travel only.
- 3.10 Subject to exceptional circumstances, such as a person's wellbeing or accessibility, air travel will not be permitted where rail alternative is available for journeys less than three hours.
- 3.11 Hotel accommodation must be booked in line with the BRC's Hotel Programme. Hotel prices fluctuate regularly, therefore, the best price on the day should be booked.
- 3.12 Economy and compact sized cars should be rented whenever possible. Larger-sized vehicles may also be rented if there is a valid business justification and pre-approval is required, e.g. number of passengers or equipment required for journey.
- 3.13 Vehicles rented for greater than four weeks will require ongoing justification and additional approval. 'Pool' cars should be considered as the first option if a vehicle is required.

4 Booking Travel and Submitting Expenses Claims

- 4.1 All travel (including air, rail, car rental, car parking and hotel accommodation) must be booked through the BRC's authorised travel agency online booking tool - except for rail journeys costing less than £10.
- 4.2 Travel bookings must be made using the online tool, being more cost-effective for the BRC. Telephone bookings may still be made where this is not possible, or by contacting the customer service team whilst travelling to amend and/or support a booking.
- 4.3 For complex international travel, it is recommended to contact the authorised travel agency by phone who can advise on the best itinerary and most cost-effective travel.
- 4.4 For all [overseas travel](#), further guidance is available on RedRoom to support the travel pre-approval and security process.
- 4.5 Training guidance for booking both [UK](#) and [Overseas](#) travel can be found on RedRoom to support the use of our Travel Agency portal.
- 4.6 The authorised travel agency emergency [contact number](#) should be used when travel assistance is required outside office hours. Travel and accommodation must not be booked using personal and/or BRC purchasing cards.

- 4.7 Expense claims must be submitted within three months of travel at the latest, however, this should be done as early as possible and compliant with this Policy. Staff will be reimbursed monthly (via payroll) and volunteers reimbursed weekly by BACS.
- 4.8 To ensure transparency on what we spend and for reclaiming of VAT, appropriate receipts or supporting documentation must be attached to *all* claims. It is the responsibility of line managers to ensure this is completed before approving claims. Line Managers will be held accountable for ensuring this is appropriately completed.

5 Subsistence Rates and Mileage allowances

- 5.1 The BRC pays mileage for the use of personal vehicles for business journeys. The rates payable in the table below are in line with [HMRC-approved rates](#) and must not be exceeded. Rates are applicable for petrol, diesel, hybrid and electric cars. Home-to-work' mileage claims are not permissible.

Fuel receipts are *not* required for electric cars.

Personal Car	45p per mile	Up to 10,000 miles in tax year
Personal Car	25p per mile	>10,000 miles
Motorcycle	24p per mile	
Bicycles	20p per mile	

- 5.2 Subsistence rates are set out in the table below and must not be exceeded. Claims in excess of these rates will not be reimbursed.

Expense Type	London	Rest of UK
Breakfast	£10	£10
Lunch	£8	£8
Dinner	£25	£20
'Thank you gift' - <i>in lieu of accommodation & breakfast</i>	£20	£20

- 5.3 Hotel rates are indicative of market rates and are set up on the travel booking tool. However, best price on the day must always be selected and will be monitored through reporting. Hotel ceiling rates for UK travel are set out below:

Expense Type	London	Rest of UK
Hotel Accommodation (<i>not including breakfast</i>)	£130	£90

High peak travel times/major events must be avoided for non-essential travel to prevent payment of inflated rates.

Standard specification for accommodation can be found on [RedRoom](#).

6 Monitoring and Reporting

- 6.1 The BRC shall receive monthly management information from our authorised travel agencies detailing: all travel booked; non-compliance with this Policy; and carbon data to support the strategic direction of its Green Policy.
- 6.2 Expenses will be monitored, with monthly audits on expense claims undertaken to ensure compliance with this Policy.
- 6.3 A comprehensive performance report will be provided periodically to the Executive Leadership Team by Directorate/Department, highlighting areas of compliance/non-compliance with this Policy, including the tracking of both carbon footprint and missed savings opportunities.
- 6.5 Inappropriate expense claims or deliberate misuse of the authorised travel agency booking tool may result in disciplinary action.

7 Contact Numbers

- 7.1 [Contact details](#) for all authorised BRC UK and Overseas travel agencies can be found on RedRoom.

8 Review and maintenance

- 8.1 This Policy was revised and approved in May 2021. It is next due for review in May 2024. It will be updated as necessary to take into account continual improvements, changes to any associated legislations and best practices.

9 Appendices

- a. Appendix 1: related documents
- b. Appendix 2: document provenance
- c. Appendix 3: privacy impact assessment
- d. Appendix 4: equality impact assessment
- e. Appendix 5: environmental impact assessment

Appendix 1: related documents

It is important to list any documents – other policies, procedures, guidance documents, templates, forms – which people may need to refer to or to be aware of in relation to this Policy.

Document title	Relationship to this policy
Green Policy	Guidance regarding booking most carbon efficient method of travel
International Travel Procedure	Must be followed when booking overseas travel
Guidance supporting the Travel Policy	Detailed guidance on travel categories
Purchasing Card Procedure	Must be followed in line with this Policy
Time Off In Lieu Procedure	HR Procedure for additional hours for travel time

Appendix 2: document provenance

Date endorsed	Category	Summarise changes made	Reason for changes	Consulted	Changes endorsed by
May 2021	Revised Policy	Revision to all sections	Reflect both the new Green Strategy and Fit for the Future direction of travel	[Martin Halliwell, Dorothy Brown, Deborah Viner, Hilary Oakley, Norman Mckinley, Alex Fraser, Victoria Corbishley, FFtF	Executive Leadership Team

				Advisory Panel and Staff Association.	
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Appendix 3: privacy impact assessment

Screening question:

Does this Policy relate to the gathering, processing, storing or the use of personal identifiable information of staff, volunteers, service users or donors; or gathering processing or storing commercially sensitive information (either ours or partner organisations); or altering processes or systems relating to gathering, processing or storing or use of this information?

No

Appendix 4: equality impact assessment

Screening question:

Does this Policy or any of its processes have an impact on staff, volunteers, supporters, users of our services or activities or any other people who may come into contact with us?

Yes

A detailed EQIA was carried out which highlighted many benefits from adopting hybrid working and travelling less, but also potential issues of digital exclusion for older or disabled staff and volunteers and social isolation for disabled staff and volunteers. The EQIA will be shared with the Workplaces of the Future Programme to ensure steps are taken to provide any digital technology needed and further training and guidance in their use. Training will also be provided for online meetings. This live document will be reviewed periodically once the Travel Policy goes live.

Appendix 5: environmental impact assessment

Screening question:

Does this Policy or any of its processes have an impact on the environment e.g. potential change in BRC carbon emissions; use of harmful substances, from the activities.

No – predicted fall in carbon footprint due to less travel.