

## INSTRUCTIONS ON CLAIMING EXPENSES

The Royal Town Planning Institute will reimburse expenses reasonably incurred by trustees, members, staff, and other volunteers carrying out Institute business, on a cost-effective basis.

**Expenses claims should be forwarded together with relevant receipts to your RTPI contact via ExpenseIn.** ExpenseIn accounts can be obtained from the Finance Department or the Approving Officer. ExpenseIn is an online web-based expense system which has an accompanying mobile app.

Guidance on completing your claim on ExpenseIn is available at in a separate document.

The following expenses may be claimed:

### **Rail transport**

Standard class fares will be reimbursed and claimants are encouraged to take advantage of low fare options wherever possible.

Upgrades to first class will not generally be reimbursed, and will only be considered in very exceptional circumstances and by prior agreement with the appropriate budget holder.

First class travel will also be reimbursed for journeys where the train element is over 3 hours and volunteers are expected to work whilst travelling (this is especially encouraged where the train is used as an alternative to flying). Prior agreement with the appropriate budget holder is required as the use of this clause will be at their discretion and their budget constraints. First class tickets should be advance fares to ensure that they are as cheap as possible and should only be booked by Senior Management Team members and PA's to SET/SMT on behalf of volunteers. Volunteers should only book directly with prior permission from the Head of Finance or, in their absence, the COO. It would not normally be appropriate to buy these tickets on the day. (email [finance@rtpi.org.uk](mailto:finance@rtpi.org.uk))

Where you would like to travel first class at your own expense, the RTPI will reimburse up to the standard advance fare. This should be agreed in advance with Head of Finance or COO. (email [finance@rtpi.org.uk](mailto:finance@rtpi.org.uk))

Trustees, staff, members and other volunteers entitled to purchase a senior or other discount railcard should take advantage of the reduction of fares, where possible.

### **London Transport**

Claimants are encouraged to make use of Oyster cards for travel around London where possible, and should submit claims on a journey basis, supported by receipts or Oyster statements (available online). Oyster top-ups will NOT be reimbursed; as they do not represent travel expenditure and cannot be validated as a business expense.

Contactless card and mobile payment options are also encouraged if you have created an online account to retrieve journey history statements which can then be used to support your claim. See <https://tfl.gov.uk/fares/how-to-pay-and-where-to-buy-tickets-and-oyster/pay-as-you-go/contactless-and-mobile-pay-as-you-go?intcmp=55539> for further details on account creation.

### **Bicycle Transport**

The Institute will reimburse mileage claims for use of a bicycle on official business at 20p per mile. The Institute accepts no responsibility for any loss or damage resulting from the use of a bicycle.

### **By car**

The RTPI does not encourage travel by car but recognises that there are circumstances where the use of a car is necessary. If a claim for more than 100 miles is submitted, members or staff will be required to give an indication of why driving was the most appropriate option. The RTPI will reimburse mileage claims at up to 45p per mile. A lower rate of 20p per mile will be used for members and volunteers using their company provided car (where some fixed costs are not borne by the traveller). Reduced rates of up to 25p will be paid if the claimant's mileage exceeds 10,000 miles in a tax year.

RTPI will not reimburse parking and other penalties, speeding fines or losses arising from accidents even if they arise whilst using a private car on RTPI business.

Volunteers using their private vehicles for business use are NOT covered by our insurance policy and should ensure that their private motor insurance policy includes "occasional business use".

### **Air Transport**

While air travel may appear to represent cheaper and time efficient alternative, it carries with it significant negative environmental impacts and, for this reason, the RTPI does not encourage internal flights where alternative routes are available with a less damaging impact on the environment.

Where air travel is necessary, economy class fares will be reimbursed.

'Necessary' air travel within the UK can be justified for example where this will enable the traveller to travel and complete the business in a day; where public transport combinations will result in unrealistic delay or length of travelling time; where otherwise overnight accommodation would be required; where a series of meetings can only be achieved by reducing travel time accordingly; or where the cost saving is significant over using other modes.

### **Taxis**

Taxi fares will not normally be reimbursed unless justified in such terms as personal safety, carrying heavy equipment or luggage, no suitable alternative public transport. Taxi fares will also be permitted where time is of an essence and travel by taxi is the fastest mode of transport available or where there are several people travelling together which makes this the most cost-effective option.

### **Subsistence expenses**

The Institute does not make standard subsistence allowances. Reasonable costs will be reimbursed where travelling disrupts access to normal subsistence arrangements, e.g.:-

Breakfast on a train where travel has started before 7.00 AM or where an overnight stay has been required.  
A light meal at lunchtime if food is not provided at the meeting

Food and one drink in the evening when staying overnight or when travelling after 19:00 PM or a cheaper fare has been obtained by travelling later.

A cup of tea/coffee or similar drink will be reimbursed if the journey is over 2 hours. Normally purchases of alcohol will not be reimbursed ; however a contribution of up-to £3 maybe claimed against the beverage when part of an evening meal where a receipt is provided for the actual purchase.

No subsistence claims can be reimbursed without a receipt.

### **Overnight accommodation**

The Institute will pay for overnight accommodation where this will reduce a total expense claim or reflects optimal use of time for the trustee, staff, member or other volunteer concerned; for example if attending meetings in London on consecutive days. In addition overnight accommodation may be claimed if otherwise travel from home would have to start prior to 07:30 AM or return home later than 20:00 PM.

En-suite rooms in a standard hotel will be reimbursed. Extras will not normally be paid.

### **Submitting a claim**

All expenses should be submitted electronically within one month of being incurred. Expenses not submitted within three months will not normally be reimbursed. In exceptional circumstances, a written statement explaining why the expenses have been submitted late should be included. Expenses will normally be reimbursed within two weeks of claiming. However, this period may increase if expenses for more than one meeting have to be approved by different budget holders.

Completed expense forms can be e-mailed to your RTPI contact or [finance@rtpi.org.uk](mailto:finance@rtpi.org.uk) E-mailed forms must be sent with accompanying scanned receipts.

E-mailed claims do not need to be sent via the post.

RTPI aims to pay all expenses claims via BACS. If this is your first claim or you have recently changed banks please notify the finance team of your account details for payment.

### **Climate Action**

Climate action underpins the RTPI 2020–2030 corporate strategy. We are determined to assess our climate impact and take action to address it. This is essential to accomplishing our mission “to advance the science and art of planning, working for the long-term common good and wellbeing of current and future generations”. To realise this ambition, we aim to reach a net-zero position by 2025. This will require us to reduce our greenhouse gas emissions significantly and to offset all residual emissions that we cannot reduce. To achieve this, we have developed a climate action plan to minimise the climate impacts of our own operations and to accelerate collective climate action. Included in this action plan is a commitment to reduce emissions resulting from travel. To support this, **please think carefully about travel and the alternatives to it in order to reduce the emissions it causes.** As well as the direct financial expenses of travel there are additional costs to the Institute of off-setting emissions.