



# One Beat Travel & Expense Policy

These expense guidelines detail the expenses policy that MUST be adhered to when reclaiming expenses from the British Heart Foundation (BHF) for attendance at an event.

Reasonable expenses which you (the One Beat member) incur whilst attending BHF events, causing you to be genuinely "out of pocket" will be reimbursed by the BHF.

Expenses should be kept to a minimum and be within the scope of these BHF expense guidelines. Expenses combine to represent a significant cost to BHF. Please remember that you are spending money, which has been donated to the Foundation to fund heart research, prevention of heart disease and care for those who have heart disease.

The Foundation would not want any attendees to be out of pocket, but will only reimburse expenditure as outlined within this document. BHF's finance team reserves the right to return any forms that do not comply with these guidelines.

## One Beat Expense Guidelines

It is an expectation that as a One Beat member you will travel to and from One Beat events independently, as such **the BHF will only cover expenses for the One Beat member attending the event.**

We do understand that everyone's circumstances are different and should you need a carer/responsible adult to travel with you please do contact a member of the Patient support and Engagement team (PSE) as soon as possible to discuss this.

If agreed in advance the BHF will cover the travel costs for the responsible adult/carer; however, we will not be able to cover any other expenses incurred, including food and drink.

## Travel Guidelines

Wherever possible we will ask that you make your own travel arrangements and submit an expense claim form, we will then reimburse you for these costs. When making any travel arrangements we do ask that you follow the guidelines below;

### Flights

**Should your journey to the event require you to fly please inform a member of the PSE team before booking any travel arrangements.**

- When submitting your consent form please also state what airport you will be flying from, we will then check the cost of flights from this airport to the event.
- We will take a screenshot of the most cost effective and reasonable flights available for that day and send you a copy of this. This is the amount we will be able to reimburse you.
- Should you book a flight that costs more than this amount (whether this is a different flight or due to booking closer to the event) we will not be able to reimburse you the increased difference in cost.

### Trains

**Should your journey to the event require you to travel by train please read the following guidelines before making any travel arrangements.**

- When submitting your consent form please also state what station you will be travelling from, we will then check the cost of trains from this station to the event.
- We will take a screenshot of the most cost effective and reasonable train journey available for that day and send you a copy of this. The cost of this journey is the amount that we will be able to reimburse you.
- Should you book a train journey that costs more than this amount (whether this is a different train journey or due to booking closer to the event) we will not be able to reimburse you the increased difference in cost.
- Please do use a rail card if you have one.
- We will not cover any first class travel.
- When travelling on London underground please avoid buying day Travelcards but where possible please do tap in and out using your contactless bank card or purchase a single ticket for your journey.

**We do understand that everyone's circumstances are different, so if you have any questions or require any assistance in making travel arrangements please do not hesitate to contact Ailish Reaney on 0207 554 0351**

### Public transport

Please try to use public transport, obtaining any discounts that are available. Travel using London underground and buses on Oysters cards costing less than £5 does not require a receipt.

### Taxis

Taxis should only be used where no cheaper means of transport is available. However if carrying heavy luggage, if there is a question of safety or an impact on your health involved, taxis may be used.

If you are intending to take a taxi please inform us as soon as possible

### Parking

Carage or off street parking charges should be supported by a receipt. Parking fines will not be reimbursed by the Foundation.

BHF is not responsible for missed travel connections and any costs associated with missing pre-arranged/ pre-booked travel will not be cover by BHF.

**Please keep all original receipts/ booking confirmations as we will require these to process your claim**

## **Accommodation**

Should your travel needs require you to stay the night before/after an event please inform a member of the PSE team as soon as possible and we will book these on your behalf.

The entitlement to BHF covering the cost of accommodation is generally limited to one of the following situations:

- Where an event runs over several days
- Where your journey would require you to travel before 6am to get to the event
- Where your return journey would mean that you wouldn't get home until after 11pm

## **Cancellation Charges**

Reasons must be given for any cancellation charges included in a claim and such charges may not be paid. Late notice cancellation charges relating to accommodation booked through BHF may be passed on to individuals. Each case will be examined individually and the final decision will rest with the BHF.

## Food and Drink

All events are non-smoking and alcohol free, this includes any accompanying adults.

BHF will not reimburse any expenses related to tobacco or alcohol. Any alcohol charges on submitted receipts must be crossed out before submitting.

Food and drink will always be provided by BHF during an event unless otherwise stated.

Where an overnight stay is agreed BHF will cover the cost, for One Beat members, of an evening meal the night before the stay and breakfast the morning after, no other food or drink expenses will be covered.

Where possible, breakfast will be paid for in advance by the BHF when making the hotel booking.

If meals have to be claimed within the circumstances outlined in this policy, these are the maximum allowances for each person, per meal:

- Breakfast - £8 (only if an overnight stay is required and this has not been pre-booked by BHF)
- Dinner - £15 (only if returning home after 7pm)

Please remember that BHF is a charity so wherever possible please keep all expenses to a minimum.

All meals/ refreshments must be fully receipted. Ensure you submit all original receipts with your completed expense form.

If you submit a receipt totalling more than the above amounts BHF will not pay this extra.

Please ensure all costs on receipts are made clear and are the same as those detailed on your expense claim form.

**The BHF will only reimburse food and drink costs for One Beat members. Any costs incurred by an accompanying adult will not be covered.**

## Expense Claim Process

**Please always take a photo/photocopy of your receipts and expense claim form for your own record, so should your claim go missing you will have a copy.**

- Expenses must be submitted on the standard expense form, a copy of which will be given to you at the event or can be requested by emailing [youthsupport@bhf.org.uk](mailto:youthsupport@bhf.org.uk)
- Original copies of receipts and completed form must be posted to: Ailish Reaney, Patient Support and Engagement team, British Heart Foundation, Greater London House, 180 Hampstead Road, London, NW1 7AW or emailed to [youthsupport@bhf.org.uk](mailto:youthsupport@bhf.org.uk)
- Please submit your claim promptly. Claims should be submitted within two months from the date of the event. Failure to submit expenses within this timeframe may result in non-payment.
- Detailed original receipts must be submitted with your completed expense form. Failure to present receipts without good reason will result in non-payment of that item.
- Please allow 30 working days for your expenses to be processed. BHF do not provide additional payment notification, so please ensure you check your bank account for payment confirmation.
- Expenses must be adequately described. Our auditors, in their responsibilities to trustees and to the charity commissioners, must report to the Foundation's Executive Committee where satisfactory explanations have not been submitted.
- This means that the BHF finance department will not be able to pay expenses if you do not describe the nature of the expenses.
- The foundation will reimburse expense claims by BACS transfer direct into your bank account or by cheque, you must state which method you require and give all the necessary details e.g. account number and sort code or postal address to send the cheque to.
- Incorrect or incomplete expense reports or those that have disorganised receipts will be;
  - Returned for completion
  - May result in delay or non-reimbursement of specific items
  - If no specific authorisation is given for any overspends the BHF reserves the right to reduce the claim to the prescribed limits without further notice.

**Should you have any questions or require additional information regarding these guidelines please contact Ailish Reaney  
0207 554 0351/ [reaney@bhf.org.uk](mailto:reaney@bhf.org.uk)**

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