



# **MEMBERS GUIDELINES**

# **FOR CLAIMING EXPENSES**

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## INTRODUCTION

***Contained in this document is a complete and clear guide to claiming expenses as a member***

***of UNISON.***

These guidelines have been drawn up to ease any confusion over what members can and cannot claim and to ensure that UNISON lay members who are volunteers are aware of all the allowances that are claimable when attending National meetings and Nationally organised events.

If you have any queries with regards to the contents of these guidelines please ring the member

of staff below who process your expenses based on the first letter of your surname as indicated.

Mark Hales (020)-7551-1594	Paul Jackson (020)-7551-1692	Jo Whelan (020)-7551-1727
<b>C,E,F,K,L,M,N,O</b>	<b>A,B,G,H,I,J</b>	<b>D,P,Q,R,S,T,U,V,W,X,Y,Z</b>

## OVERVIEW

***UNISON operates a central expenses system. This department undertakes to pay all expenses promptly and to reimburse those expenses in accordance with the guidelines and appropriate rates as agreed by the NEC.***

To ensure members are not prohibited from attending meetings purely on financial grounds various systems have been introduced to help.

### *IMPRESTS*

UNISON imprests are available to members who sit on multiple committees or frequently attend on UNISON business and therefore incur a high rate of expenditure. The reason for imprests is to prevent members from being financially disadvantaged whilst awaiting reimbursement of expenses.

All imprests are Sodexoued on an individual basis after assessment of past expense records,  
and on the understanding that the imprest will be repaid in full once the member ceases to belong to a National Committee.

The maximum limit allowed is **£300**, any increase in a members imprest must be authorized

by the Director of Finance.

#### CREDIT CARDS

Members of the National Executive Council can also apply for a UNISON credit card, which is valid for the duration of their stay on the council, but will be cancelled on their departure.

For imprest or Credit Card enquiries please contact: **Julie Kelly 0207-551-1737**

#### HOTEL/TRAVEL RESERVATIONS

***Centralised booking for both hotel and travel is available to members through companies that UNISON has agreements with. Further details are contained in the attached guidelines.***

## TRAVEL GUIDELINES

Generally travel expenses will be incurred by members when travelling from either their home or place of work to a meeting and returning back again. These expenses are reclaimable but any variations on the above for social reasons should be at the members expense and not that of UNISON. For any unusual travel arrangements a note should always be attached to the expenses claim.

Currently UNISON operates a scheme whereby all members have access to Rail and Air bookings through a company called Stewart Travel, this offers many benefits by providing system that serves all members equally and eliminates the financial burden that might otherwise exist.

Below you will find a more detailed guide to the booking and claiming for the various modes of travel available.

**Please remember you should always endeavor to use the cheapest, but appropriate means of transport.**

## **RAIL TRAVEL**

Rail travel should be booked through Stewart Travel. The cheapest available ticket should always be offered to you for any particular journey this will include Apex and Saver Type tickets, the only exceptions to this are due to the following conditions:

- The journey involved is in excess of 250 miles in each direction
- The member has access Sodexoues due to disability
- The journey is made during peak travel times where a reservation is necessary and no standard class seats are available.

Any member not using the above system and purchasing rail tickets themselves should be aware that only standard class or cheaper fares are allowed and that these are only payable when accompanied by the appropriate receipt.

Any unused tickets should be sent to:

Stewart Travel refunds Dept, 48 HAMILTON STREET, SALTCOATS,KA21 5DS

### **IMPORTANT INFORMATION**

#### **Rail Bookings :**

***Tel no: 0845-872-4440    Fax no: 01294-605246    Email:  
unison@stewarttravel.co.uk***

## **Out of Hours Tel No's:**

UK: 0203-130-9633

## **AIR TRAVEL**

### ***Air travel should also be booked through Stewart Travel. Air travel is applicable for those***

who journey to or from Northern Ireland and Scotland or where a significant saving in time or cost to the traveler and UNISON can be achieved.

All air travel will be booked on an economy basis unless no economy seats are available for your particular travel times, in this instance a business class seat will be offered.

Members will not be able to select the airline used for travel, this being determined by the company offering the cheapest direct flight at that time. Wherever possible air tickets should be fixed to specific flights in order to take advantage of any discounted fares that are available. If this proves impractical the return portion of the ticket can be Sodexoued on a flexible basis allowing for some change, but this only applies to return journeys and not outbound.

As with the rail guidelines any member not using Stewart Travel, and purchasing their tickets themselves, is expected to purchase an economy fare and ensure that the appropriate receipt is attached to their expenses claim.

## **IMPORTANT INFORMATION**

### **Air Bookings:**

Tel no: 0845-872-4440

Fax no: 01294-605246

Email: [unison@stewarttravel.co.uk](mailto:unison@stewarttravel.co.uk)

### **Out of Hours Tel No's:**

UK: 0203-130-9633

## **PRIVATE CAR**

Members who use their own car when travelling to and from meetings are entitled to reimbursement based on the number of miles driven times the current mileage rate.

The current mileage rate (As at SEP 2010) is 40p per mile

Members giving lifts to colleagues in their own car are entitled to a further supplement of 20% per member carried. Any such claims must state the name of the member receiving the lift.

This supplement relates only to fellow committee members and not in the case of dependants who would normally be expected to travel together.

Receipts need to be provided for any parking expenses incurred when a private car is used.

## **TAXIS**

Taxis should only be used when the following applies, where public transport is not available,  
when heavy luggage is to be carried or when disability renders using a taxi necessary.  
Taxi travel is also available if there is a real threat to personal safety.

The head office taxi account is not for general use. Authorised users are the Presidential Team and NEC members on national bodies eg. TUC General Council or Labour Party NEC. Staff cannot routinely book taxis for NEC members.

**Receipts must be provided for all taxi journeys, otherwise the claim may not be reimbursed**

SUBSISTENCE GUIDELINES
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Subsistence allowances are paid to UNISON members on the basis that no member volunteering to take part in national work or meetings should be out of pocket as a result. UNISON expense allowances are split into two separate components, firstly a daily subsistence allowance covering all meal costs and secondly an overnight accommodation allowance covering hotel bills.

## **DAILY SUBSISTENCE ALLOWANCE**

Members will be reimbursed a daily rate for subsistence as follows:

Up to eight hours	£20.00
Over eight hours	£40.00

The daily rate is made up of the following individual meal allowances:

Lunch £13.50	Tea £6.50	Dinner £20.00
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When travelling down to a meeting the day before only a half days allowance is claimable of £20.00. (For example if coming down the day before a 1 day meeting the member can

claim £60.00 which is £20.00 for the day prior to the meeting and £40.00 for the day of the meeting).

The individual meal allowance rates are also used for deduction purposes when a meal has been centrally provided by UNISON or an outside body. Please remember any meals provided should be clearly marked on your expenses claim form.

## **OVERNIGHT ACCOMMODATION ALLOWANCE**

### ***Currently UNISON operates a system of reimbursement for accommodation costs which***

includes two different rates, the reason for this is to recognise the additional cost of staying in hotels in the London region.

The rates (As at Sep 2010) are as follows:

London                      £90.00 (Within the M25)

***Rest of the country      £75.00***

***Please note that if the hotel accommodation you book does not supply breakfast, then this can be claimed as a separate item, as long as a receipt is provided.***

Trust Reservations has been chosen as Unisons preferred supplier for hotel accommodation, please contact them on **Tel: 01753-841666** or **Fax: 01753-853113** for all hotel bookings.

**Please note:** Accommodation booked through Trust Reservations is paid centrally by Unison but all additional costs must be paid by the member on departure.

## **ALL INCLUSIVE MEETINGS**

***A meeting or event is deemed all inclusive when all accommodation and meals are provided centrally for the duration of that meeting, course or seminar. This does not however cover the periods of travelling to and from the meeting/event. In such instances a supplementary allowance is payable at £10.00 per day (As at Sep 2010). This replaces the usual £40.00 daily allowance.***

The rate for dependant children is £5.00 per night.

## **DEPENDANT CARE ALLOWANCES**

*Dependant care is split into two categories, the first is where a dependant accompanies the*

*member to a meeting and the second where the dependant stays at home.*

### **(i) ACCOMPANYING A MEMBER**

***Where an adult or child dependant aged between 13-17 accompanies a member to a meeting***

they are entitled to the full daily allowance of £40.00.

Where the dependant is a child under the age of 13 they would be entitled to 75% of the daily allowance, which works out to £30.00. If the child was placed in a creche then a rate of £15.00 per day would apply.

As far as overnight accommodation for dependants is concerned all normal rules and rates as explained in the previous section would be applicable.

### **(ii) CHILD DEPENDANT HOME CARE**

Where the child dependant stays at home and does not accompany the member to the meeting then only that expenditure which is over and above what would normally be incurred by the member can be reclaimed from UNISON. A separate claim form exists for child dependant home care expenses.

The rates for home care comprise a day rate of up to a maximum of £32.00 and a night rate

of up to a maximum of £16.00. The night rate is payable from 6.00pm and an overnight stay need not be incurred for this allowance to be claimed. If the member has more than one

dependant then an additional rate of 20% of the above rates is payable per dependant.

Dependant childcare is payable on behalf of children up to the age of 17. All claims need to be accompanied by a receipt that states both the name and address of the carer.

### **(iii) ADULT DEPENDANT HOME CARE**

UNISON policy makes financial provision for home care to members who have adult dependants who are disabled in order that they can be involved and participate in national union activities; this provision is not intended to undermine public service provision. The financial support available is intended to reimburse the additional cost of providing practical care solutions when members are away from their caring responsibilities, to attend union business. Where the dependant stays at home and does not accompany the member to the meeting, only the expenditure that is over and above what would normally

be incurred by the member can be reclaimed from UNISON. A separate claim form exists for dependant home care expenses.

The rates for home care comprise a day rate of up to a maximum of £32.00 and a night rate

of up to a maximum of £16.00. The night rate is payable from 6.00pm and an overnight stay need not be incurred for this allowance to be claimed. If the member has more than one

dependant then an additional rate of 20% of the above rates is payable per dependant.

Members making claims should provide evidence that their adult dependant has one of the following:

- Attendance Allowance Payment
- Disability Living Allowance Payment
- Blue Badge Parking Permit
- Disabled Person's Rail Card
- Disabled Person's Concessionary Fare Pass
- Tribunal Decision
- Blind/Partial Sight Registration
- Incapacity Benefit Payment
- Industrial Injury Payment
- Medical Certificate
- Other similar evidence. Note - If a doctors' letter is submitted as evidence and a fee is payable, the union will reimburse this cost.

Members are invited to make a single application to the Head of the General Secretary's Department for authorisation to entitlement to the allowance. Once approved, all associated committee administrators will be advised that approval has been agreed in relation to meetings of strategic, standing, self organized committee and union events. It is hoped that this procedure will reduce bureaucracy and enable officers to sanction individual claims more speedily.

Members are encouraged to get advice from UNISON Welfare Services if they need assistance with claiming state benefits.

Member's applications for home care allowance will be treated in strictest confidence.

## **LOSS OF EARNINGS**

Where a member suffers loss of earnings due to attending a meeting appropriate reimbursement will be made. This loss of earnings payment will only be made in respect of actual hours lost.

All claims must be accompanied with a letter from the employer stating the net pay that has been deducted due to the attendance at the meeting. Where this is not possible due to reasons of sensitivity comparative payslips showing the deduction must be included.

Where the member incurs loss of earnings on a frequent basis due to attendance at national meetings arrangements can be made with the member's employer to have the union invoiced direct by the employer. These arrangements should be made following negotiations between the employer and the members regional secretary. Any such agreement should cover national meetings only.

## **MISCELLANEOUS EXPENSES**

From time to time members will incur expenditure that does not fall clearly into any of the above categories. Some examples might include postage, phones, photos for conference passes, and inoculations prior to foreign travel. Expenditure will be paid on such items if they were unavoidably incurred as part of national committee meeting work, as long as receipts and a note as way of explanation are attached to the expenses claim.

## **COMPLETION OF THE EXPENSES CLAIM FORM**

Members must take responsibility for fully completing the expenses claim form before handing it in. Where the expenses claim covers more than one meeting the expenditure must be allocated between the meetings on the expenses claim form by the claimant. The split of expenses between the meetings should reflect the duration of each meeting. The claim form must be signed by the claimant in the space provided at the bottom of the form. It is important that the meeting times and the departure from home/work and the return to home/work times are completed on all forms.

It would be helpful if claim forms were submitted after all expenditure incurred is known.

Before any expenses claim form can be processed it needs to be authorised and coded by the budget holders for the meeting attended. **Claim forms should therefore be sent to the committee clerks and not the Finance Department.** Receipts should be provided wherever possible and all receipts should be securely attached to the reverse of the form. Where expenses are being claimed in unusual circumstances a written explanation should accompany the claim.

The Finance Department expects all claims to be fully checked prior to them being submitted to the Finance Department.

It is the responsibility of both the Finance Department and, the authorizing officer to question any item of expenditure. In instances where there is a dispute over expense entitlement this will be referred to the Payments team leader and if the circumstances dictate either the Director of finance and, or, the General Secretary.

Where there is a dispute, reimbursement of the disputed amount will be withheld and the balance of the claim will be paid.

It is important that all expense claims are submitted promptly. Claims older than six months will not be reimbursed.

## **SCOPE OF THE GUIDELINES**

These guidelines are intended to cover payment of expenses for members attending national meetings on national business.

For regional meetings of all types regional expense rates will be paid at regional level from regional funds.

Where National Executive members attend branch meetings at a branch's request they will be paid directly by the branch at rates mutually agreeable.