



SIGBI TRAVEL AND EXPENSES POLICY 2015

For the purpose of this document, references to SIGBI Limited and Soroptimist International will be written as "SIGBI" and "SI" only.

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SIGBI LIMITED TRAVEL AND EXPENSES POLICY

1. General Policy

SIGBI members and staff asked to travel, make a journey or attend a meeting on behalf of SIGBI will be reimbursed in line with the SIGBI Travel and Expenses Policy. They will be expected to exercise discretion and good judgement when incurring business related expenses and all expenses must be adequately documented and must be accounted for with proper receipts attached to any claim.

2. Travel/Transport

Travel costs will be reimbursed on production of receipts and/or tickets only. All travel should be undertaken in the most economical way possible. This is based on an economy air fare or standard/second class rail travel. Members wishing to upgrade must do so at their own expense.

Where possible, when meeting dates are known in advance, travel should be booked early to take advantage of cheaper fares and use of any travel cards (eg UK over 60s railcard).

Any overseas travel should be approved by SIGBI HQ prior to travel. Details of reasonable fare levels for the countries within SIGBI are held at SIGBI HQ. Members should normally use the services of Argos Travel, but internet fares may be cheaper at times. Staff at SIGBI HQ will advise.

Upgraded travel will not be reimbursed except in extenuating circumstances and with prior approval from the Director of Finance or person with designated authority from her.

Taxi costs will not be reimbursed unless arrival/departure times are very late at night or very early in the morning and there is no alternative way of reaching the meeting. Prior approval for the use of a taxi should be sought from the Federation Director of Finance or person with designated authority from her.

3. Ferries/Boats

Any such travel should be undertaken in the most economical way possible (by booking in advance for cheaper fares etc).

4. Travel by Car

If a member travels by car, reimbursement will be based on actual miles multiplied by the Federation approved rate (currently at 44p per mile) plus tolls and reasonable parking fees. The approved rate will be reviewed annually at the October FMB meeting.

Car hire will not normally be approved unless under extenuating circumstances and only with prior approval from the Federation Director of Finance or person with designated authority from her.

5. Travel insurance whilst on SIGBI business

In 2009 the Federation Executive Board (FEB) decreed that anyone travelling on behalf of SIGBI should take out their own travel insurance policy at their own expense. That decision still stands. **The SIGBI member should confirm with SIGBI HQ that she has such travel insurance (preferably with a copy of the policy).**

6. Visas

If a member needs a visa to travel to a SIGBI meeting or conference, she should apply sufficiently in advance and claim back the cost with a receipt. A visa should only be claimed for the length of her term of office.

Visas must be approved and obtained before flights are booked as flights are non-transferrable and non-refundable. The costs of flights booked without visa confirmation or approval from SIGBI HQ, which may later have to be cancelled, will not be reimbursed by the Federation.

7. Currency Exchange Rates

Where travel is related to an overseas conference or meeting, the currency exchange rate, as recorded one week prior to the conference, will be used.

8. Accommodation Expenses

A per diem allowance is set at the October FMB meeting each year. Currently this is set at £55.

To help defray costs, members may wish to share hotel rooms wherever possible.

9. Miscellaneous Expenses

Any expenses claimed for that are not for either travel or accommodation allowance should be **accounted for and explained** (and documented with prior approval where appropriate). These items must be directly related to SIGBI business (eg telephone calls, postage, photocopying etc).

Where a member is entertaining on behalf of SIGBI she will either use her own budget if she is a budget holder. If she is a non-budget holder she should refer to the Financial Standing Orders for guidance and get approval of the limit of expenses by the Federation Director of Finance or person with designated authority from her before the event.

10. Other Expenses

SIGBI members and staff are personally responsible for all expenses incurred by their spouses/partners/families/friends accompanying them.

11. Personal Tax Liabilities

It is the responsibility of a member to ascertain whether she is liable for any personal tax payments with respect to any travel and expenses received from SIGBI.

12. SIGBI Conference and Pre-Conference Meetings

Members of the Federation Management Board (Directors, HR Liaison and Procedural Consultant, Federation Programme Team (Assistant Programme Directors, SIGBI Friendship Link Co-ordinator and SIGBI Project Liaison) and members of the Federation Programme Action Committee (Country Programme Action Chairmen) are required to attend meetings immediately prior to the SIGBI Conference (held in October/November each year).

To facilitate their attendance primarily at pre-Conference meetings, but also Conference (both within and outside the UK), those named above are entitled to two nights per diem and re-imbursment of travel (economy only) and visa requirements. To facilitate this process, those named above should complete the Travel Authorisation Form and submit this to SIGBI HQ by no later than 15 August each year. The earlier this form is submitted the easier it will be for SIGBI HQ and those attending.

No travel or accommodation should be booked until this form has been authorised by the Director of Finance.

All those attending and receiving expenses for pre-Conference meetings are expected to attend the SIGBI Conference, as part of their responsibilities as Federation representatives and post-holders.

13. Expenses Claims

Expense claims forms (attached) should be completed as soon as possible and should be sent to SIGBI HQ for approval and reimbursement no later than 30 working days after the event. No expenses will be reimbursed if they are submitted after the close of the financial year in which they occur (unless approved by the Federation Director of Finance or person with designated authority from her).

Expenses for attendance at pre-Conference meetings should be completed prior to attendance and all receipts attached. Expenses Claims should be submitted on the morning of the meeting for collection later that day.

Where attendees require payment by an International Bank Transfer, the 'International Bank Transfer' section of the Expenses Claim Form must be collected in full.

14. Payment of Expenses

Payment of expenses will normally be via a sterling cheque, BACS transfer or International Bank Transfer. The cost of an International Bank Transfer will be met by SIGBI. Payment of expenses by cash is no longer an option.

TRAVEL AUTHORISATION FORM

Name	
Position within SIGBI:	
Email:	
Contact Telephone Number:	
Next of Kin: Address: Contact Telephone Number:	
Purpose of Travel:	
Is a Visa Required? (A visa must be acquired before booking flights)	
Cost of Visa:	
Departure Date:	
Departing from:	
Flight Number: (if applicable)	
Return Date:	
Returning to:	

Flight Number:(if applicable)	
Hotel/Address/Telephone No: (during visit)	
Please provide a copy of your valid travel insurance policy:	
Other form(s) of transport required during visit: (Trains/Buses/Coaches/Taxis)	
Per Diem (if applicable)	
Any other costs: (please list)	

Please note: full receipts must be attached to this claim form.

Name of Claimant:

Signature of Claimant:

Date:

Approved by:
(SIGBI Director of Finance)

**Soroptimist international Great Britain and Ireland (SIGBI) Limited
Expenses Claim Form**

Please attach all receipts and retain a copy for your own record

Name	
Address:	
Position in SIGBI (eg FPAC Chairman)	
Reason for Claim (eg Attendance at FPAC meeting)	
Travel (Please provide full details of Flights/trains/coaches)	
Per Diem (if applicable)	
Other (For example, postage, telephone, photocopying)	
Methods of Payment:	
Sterling Cheque Insert your full name as it appears on your bank account	
BACS Payment (Sterling): Insert your full name as it appears on your bank account Insert your bank account number Insert your bank sort code	
International Bank Transfer Insert your full name as it appears on your bank account Insert your full address Insert your account number or IBAN number Insert your SWIFT BIC number Insert the currency you want to be paid in	

Signature: Date:

Authorised by: Date:

**Please send the completed form to SIGBI HQ, 2nd Floor, Beckwith House, 1 Wellington Road North, Stockport,
SK4 3AF as soon as possible and no later than 30 days after the event.**