SAMA 82	Controlled Document

The South Atlantic Medal Association (1982)

RULES FOR REIMBURSEMENT OF EXPENSES

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Available (upon approval) to	Members and Volunteers
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POLICY CONTEXT & REQUIREMENT

This policy have been developed to protect the organisation, employees, trustees, membership and volunteers by ensuring expenses are paid in line with organisational objectives and financial policies and processes.

Version Control				
Version	Author	Status	Date	Change Detail
3.0	Andrew Lockett	Implemented	11/06/2024	N/A
3.1	Alan Dodsworth	Implemented	19/08/2026	New Front Page, Policy Lead & Version Control
4.0	Alan Dodsworth	Implemented	29/09/2026	Addition of Electric Vehicle Guidance at section 9 and implementation of Treasurer expenses approval at section 23.7
4.1	Alan Dodsworth	Implemented	30/10/2026	Section 9 – Change to Mileage Rates for privately owned vehicles

1. **The trustees of the association have a responsibility to manage the funds to meet the charitable purposes of the association.**
2. **Definitions**
   2.1 Approved: approval by a nominated trustee.
   2.2 Reimbursement: means for the purpose of settling out of pocket expenses for travel, subsistence and communication expended for the business of SAMA 82.
   2.3 Section: an authorised, partly autonomous element within the association such as an area or branch or specialist activity association to which association rules apply.
3. **General**
   3.1 Approval by a nominated trustee must be obtained before incurring any expenditure on behalf of the association.
4. **It is the policy of SAMA 82 that approved expenses be reimbursed provided all of the following conditions are met:**
   4.1 they are reasonable and necessary for the purposes of the association,
   4.2 they are claimed using the appropriate procedure in a reasonable time,
   4.3 the procedures are followed for approval,
   4.4 the costs are minimised by appropriate care and research,
   4.5 the claim is restricted to travel and subsistence or actual costs relating to communication or representation.
5. **No reimbursements are made for the following:**
   5.1 loss of earnings or opportunities,
   5.2 consequential losses caused by carrying out SAMA 82 duties,
   5.3 excess costs that could be avoided by prudent planning,
   5.4 delays due to the actions of a claimant,
   5.5 attendance at AGM or EGM and meetings clustered with AGM or EGM,
   5.6 attendance at social gatherings,
   5.7 travel and overnight stays for the convenience of a claimant,
   5.8 gratuities,
   5.9 gifts or presentations other than those approved by the chairman,
   5.10 losses of personal or association equipment,
   5.11 costs of vehicle breakdown or insurance claims or thefts,
   5.12 the purchase of benefit procedures or cards giving access to cheap fares or lower rates for subsistence.
6. **Reimbursement may be made for the following:**
   6.1 trustees' meeting,
   6.2 area representatives' annual meeting,
   6.3 sub-committee meetings when called by a trustee,
   6.4 standard bearing,
   6.5 representing trustees or the association at a formal function,
   6.6 approved training of benefit to the association,
   6.7 for the purpose of re-routing a traveller to meet a close family urgency or emergency during duty travel or business,
   6.8 for committed costs wasted through family urgency or emergency during duty travel or business.
7. **Reimbursement may pay for:**
   7.1 travel by own private vehicle - paid at the agreed motor mileage rate,
   7.2 cost of tolls, parking, ferry charges and congestion charges,
   7.3 travel by public transport – most economical route,
   7.4 overnight accommodation,
   7.5 purchase of SAMA 82 wreaths,
   7.6 purchase of a SAMA shield for presentation purposes,
   7.7 payment for standard bearer and standard,
      7.7.1 funeral – payment for expenses should come from the estate of the deceased

except if authorised by trustees,

7.7.2 other events – must pre-authorised by trustees.

7.8 actual cost of postage and telephone supported by records,

7.9 actual cost of stationary supported by records,

7.10 travel, subsistence and costs undertaken on behalf of association sections/branches,

7.10.1 these costs may be reimbursed under the same conditions as for the association but are paid for by the section/branches.

8. Travel and subsistence for shared expenses with other charities sharing similar objectives.

8.1 The association will apply the same conditions for such reimbursements, but the reimbursement will be a shared proportion of the costs with the other charities.

Specific Arrangements

9. Travelling by own private vehicle

9.1 **Petrol/Diesel/Hybrid (PDH) Powered Vehicles**

9.1.1 For volunteers with a PDH powered vehicle a round trip the rate is 55 pence per mile for the first 150 miles and 25 pence a mile for the remainder.

9.1.2 For employees on a trip the rate is 55 pence per mile for a maximum of 10,000 miles per year.

9.1.3 Alternatively, a claim may be made for fuel consumed based on a reasonable estimate from the fuel gauge or normal petrol consumption of the vehicle.

9.1.4 The round trip is deemed to be from the start point (usually home) to the finish point (usually home) and can be completed in one day or more than one day.

9.2 **Full Electric vehicles**

9.2.1 For volunteers with a PDH powered vehicle a round trip the rate is 55 pence per mile for the first 150 miles and 25 pence a mile for the remainder.

9.2.2 For employees on a trip the rate is 55 pence per mile for a maximum of 10,000 miles per year.

10. Motor mileage allowance (MMA)

10.1 The rate of MMA is set and reviewed by the trustees.

10.2 The following are examples when MMA will be permitted:

10.2.1 standard Bearer duties when requested by SAMA 82,

10.2.2 approved Attendance at meetings,

10.2.3 approved car travel by persons whose health, mobility or the complexity of the public transport option make use of public transport impracticable,

10.2.4 approved representation of the association but only with prior approval and where the activity is significant to the objectives or prosperity of the association such as giving talks and lectures,

10.2.5 any other approved reason that does not fall within the scope of the above.

10.3 The following are examples of when MMA will not be allowed:

10.3.1 attending the SAMA 82 AGM or EGMs,

10.3.2 attending a fund-raising event except when approved to do so by a trustee,

10.3.3 a Standard Bearer responding to a private request to attend a funeral, function or event. In this case those requiring the presence of the Standard Bearer should be informed (beforehand) that all travel and, if necessary, accommodation expenses are required to be paid for by them.

11. Examples of attendance that may receive reimbursement:

11.1 attending a function to receive a cheque,

11.2 to make a presentation,

11.3 to give a talk on behalf of SAMA 82,

11.4 approved attendance at a fundraising event,

11.5 attending approved training as a student,

11.6 attending a conference as a delegate or presenter.

12. Other expenses

12.1 SAMA 82 may reimburse all reasonable administrative cost including:

12.1.1 second class postage on behalf of SAMA 82,
12.1.2 purchase of necessary stationery,
12.1.3 telephone calls on SAMA 82 business.

12.2 SAMA 82 will not reimburse expenses for:
12.2.1 personal computer equipment,
12.2.2 internet connections,
12.2.3 dedicated telephone lines,
12.2.4 telephone calls outside UK unless first approved,
12.2.5 first class postage.

13. Travelling by Rail

13.1 The reimbursement of rail, tube and other public rail service fares may be made for approved journeys only.

13.2 SAMA 82 will not reimburse first class rail travel unless it is cheaper than the equivalent standard class.

13.3 The trustees encourage claimants to purchase appropriate discount rail or other travel cards such as disabled, senior citizen rail cards or oyster cards wherever possible before travelling. The purchase of these cards is a private matter and will not be reimbursed by SAMA 82.

13.4 Rail travel should be timed to take benefit from off-peak fares.

14. Travel by Air

14.1 Only approved air travel will be reimbursed. Air travel may be approved when it is shown that it is cheaper than travel by over-land public transport.

15. Travel by Sea.

15.1 Only approved sea travel will be reimbursed.

16. Hire Cars

16.1 Use of hire cars may be approved if the overall cost can be shown to be less than the equivalent payment of motor mileage allowance.

17. Advanced Claims.

17.1 Claims for expenditure ahead of the journey for approved rail, sea and air travel may be made on submission of a suitable estimate of costs and the journey is approved.

18. All travel claims

18.1 All journeys must be taken on the most economical routes and wherever possible advantage should be taken of advanced ticket purchases.

19. Subsistence

19.1 Reimbursement of out-of-pocket expenses for commitments involving more than 10 hours away from normal place of residence may be made to cover the cost of subsistence when supported by receipts. This is limited to a maximum of £25 per day.

20. Accommodation

20.1 The cost of overnight accommodation may be reimbursed if prior approval has been given and the claim is supported by receipts.

21. Gratuities

21.1 Any gratuities paid are a private matter and will not be reimbursed.

22. Prior Approval

22.1 Prior approval is to be obtained from the Treasurer or Chairman if a trustee or member is in any doubt as to the acceptability of their travel and where applicable, their planned accommodation arrangements.

23. Submission and Payment of Expense Claims

23.1 All funds collected at events are to be collated and paid into the organisation's bank account without deducting expenses first.

23.2 Expense Claims are to be completed on the approved form with name, telephone, email and postal address, bank details and name on the account, an account of the payments made and the journeys completed.

23.3 Claims are to be submitted to the Treasurer via his SAMA 82 email address for payment approval and action.

23.4 Where discrepancies occur, the Treasurer will discuss the claim with the claimant.

23.4.1 If the issue cannot be resolved the opinion of the Chairman or another trustee is to be sought.

23.5 The treasurer will always aim to process claims on the same day to ensure no one is out of pocket, but sometimes this may not be practicable, so the treasurer will action as soon as possible.

23.6 The treasurer will inform the recipient and the SAMA office that the expense claim has been processed.

23.7 Personal expense claims made by the treasurer must be forwarded to the chairman, for written approval by email. Once received the claim can be processed and reimbursed. A copy of the approval email must be kept on file along with the claim form, for audit and scrutiny purposes.

24. Publication

24.1 Reimbursement paid to individuals may be published in annual reports or elsewhere.

25. Appeals

25.1 A claimant may appeal against a first decision and should submit reasons for the claim and supporting details.

25.2 The Chairman shall assess any appeal and may form a sub-committee to assess the claim and any supporting information.

25.3 The Chairman, with any advice supplied by a sub-committee, shall give a decision which shall be final.