

Expenses Policy

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US Expenses Policy

Introduction

As a charitable organisation, it is important that United Synagogue keeps a firm control over its costs, and that proper governance is in place, to ensure that this is the case. An appropriate and fair expenses policy is part of that control process. This policy is intended to provide guidance and clarity for staff, volunteers, and lay leaders, when incurring expenses, either out of pocket, or using a corporate card.

All legitimate expenses, incurred in accordance with this expenses policy, will be reimbursed. However, it is the claimant's responsibility, to ensure that costs are reasonable. The United Synagogue reserves the right not to reimburse expenses when they do not comply with this policy. Expenditure through petty cash, (or which would ordinarily be through petty cash), is reimbursed separately on production of a valid receipt.

Falsifying, duplicating or exaggerating expense claims will be classed as gross misconduct and may lead to summary dismissal.

Roles and responsibilities

It is the responsibility of every member of staff, volunteer, and lay leader, to adhere to this policy.

Approvers of corporate card, and out-of-pocket expense claims, are responsible for reviewing, challenging when necessary, and approving, or rejecting claims. Any claim submitted to Payroll, (or via the intranet payment system for volunteers), that is not in accordance with the expense policy, will be returned to the claimant for corrective action, with a notification to the approver.

Please direct any questions regarding this expense policy to your designated HR Business Partner.

Claim period

Where an individual has incurred an expense, **wholly, exclusively, and necessarily in the performance of their duties with the United Synagogue**, it is reclaimable in accordance with this expenses policy. A monthly expense claim should be logged through CoreHR. Employees in the Kashrut division should continue to submit a manual claim form, (Appendix 1), this should be completed and submitted for approval to their designated approver, in accordance with (table 1). Submission of one expense claim per month, per individual, is permitted.

Duly approved expense claims should be submitted to the Payroll Manager, by the 10th of each month, unless advised otherwise.

Claims submitted after this time, are not guaranteed to be reimbursed that month. Claims for expenses incurred more than six months prior to the date of the claim being submitted, may not be accepted, or processed.

Corporate credit cards

Corporate cards may only be used for business expenditure. **Personal expenditure of any kind is not allowed on a corporate card.**

The corporate card is issued to certain nominated members of staff, who have a need to regularly purchase goods and services on behalf of the organisation. This card may be used by the cardholder, to purchase goods and services, from a supplier that is not listed on the US Finance system, provided that:

- the United Synagogue is unlikely to use the supplier on a regular basis (maximum of 3 times a year); and,
- the total annual expenditure with the supplier does not exceed £5000, with no single transaction exceeding £2500. Any expenditure larger than £2500 would need prior approval from either the Chief Operating Officer or the Chief Executive.
- goods or services are bought from a supplier, where it is not possible to pay on invoice e.g. internet purchases, supermarkets etc.

Staff should liaise with the Finance team for guidance, if needed.

All corporate cards will have an individual cardholder named on each card. All expenditure incurred using the card, must be appropriately coded and authorised, on the corresponding monthly card statement.

Once approved, all monthly corporate card statements will be reviewed and countersigned, by either the Chief Operating Officer, Chief Finance Officer or Chief Executive.

Reimbursement of expenses

Out-of-pocket expenses will only be reimbursed if they are:

- incurred wholly, exclusively, and necessarily in the performance of the claimant's duties with the United Synagogue
- supported by invoices or payment receipts, (credit card slips without corresponding receipts are only valid in exceptional circumstances, please refer to the lost and missing receipts section below)
- submitted online through CoreHR, or (for Kashrut), on a fully completed, and appropriately authorised & approved, US expenses claim form
- claimed and approved in accordance with this policy

In the interests of reimbursing individuals promptly, for expenditure incurred on behalf of the organisation, and ensuring that all known costs are recognised in a timely manner, all claims should be submitted within 90 days. Exceptions should be flagged, and require supporting comment from the individual's line manager, to consider approval.

In certain circumstances, the organisation may reimburse minor claims, for travel, without a backup receipt, for example, a toll-fee where no receipt is issued, although details of the trip should be provided. An explanation should also be given as to why no receipt has been provided. This must be included in the description section of the online claim, or (for Kashrut) on the claim form, before obtaining authorisation from the approver.

When using a prepaid oyster card to travel on United Synagogue business, the details of the journey made, including cost and reason for travel, should be provided, (journey details are available from Oyster on-line). Corporate cards should not be used to top up Oyster cards.

For staff, payment of expense claims will be added to the monthly salary payments. Volunteers and lay leaders will be reimbursed through the intranet payment system, in the week following submission of an approved expense claim.

Lost and missing receipts

Where it is beyond an individual's control to provide an official receipt for an expense, the reason for non-submission of the receipt, must be stated clearly in the description section of the online claim, or

(for Kashrut), on the expenses claim form, and approved by their line manager, (as set out in Table 1 below).

Approval of expenses

The approver is responsible for checking the validity of all claims presented to them, before authorising payment. If unclear, or in doubt over the validity of any element of the expenses being claimed, the approver must request and obtain, satisfactory additional supporting documentation, prior to approving.

Once an expense claim has been submitted for approval, it must be processed as soon as possible, and always within seven days of submission. If an approver is either absent from the office, or unable to fulfil this function for any other reason, over an extended period, they must ensure that an appropriate senior manager is delegated to approve claims in their absence. The delegated approver must be a colleague, of at least equal seniority within the organisation, and have sufficient operational knowledge, to provide a meaningful control, and effective oversight.

To ensure adherence to this policy, US Finance will also randomly review several of the approved expense claims each month, prior to payment. If any claims are found to be inconsistent with this policy, as a result of these checks, the claim will be rejected and both the claimant, and the respective approver will be notified of the reason(s) for this, together with a request for corrective action.

In relation to this policy, expenses can only be authorised by the appropriate approver, as set out in Table 1 below.

Claimant	Approver
For all staff	Line manager
For Divisional Directors	Chief Executive or Chief Operating Officer
For Chief Operating Officer	Chief Executive
For Chief Executive	President
For synagogue staff, members, and Honorary Officers	Synagogue Financial Representative
For the synagogue Financial Representative	Chief Financial Officer or Head of Community Finance

TABLE 1 – APPROVAL HIERARCHY FOR EXPENSES CLAIMS

Where a Divisional Head is absent or otherwise unable to approve an expense claim, the Chief Operating Officer will approve, as a substitute.

Travel expenses

Individuals must be mindful of both, the cost and environmental impact of business travel, and actively consider the feasibility of using other less expensive and lower carbon alternatives, such as email, audio, or video conferencing etc, when evaluating the need to travel for business.

The United Synagogue will reimburse reasonable costs, of necessary travel, on US business. For this purpose, the following **do not** count as travel on United Synagogue business:

- travel between home and permanent workplace
- other travel which is primarily for private purposes

- travel, which is primarily for business purposes, but which is substantially the same as travel between home and the permanent workplace, except where incremental expense is incurred.

For the avoidance of doubt, only travel costs that are in excess of the normal cost of travel between home and the normal place of work, will be eligible for reimbursement.

Individuals must make every effort to obtain the most economical rates, use the most cost-effective transport option available, and take the most appropriate route, consistent with the purpose of the trip.

Staff and volunteers should travel to off-site meetings, and between offices, by the most cost-effective and appropriate mode of transport, taking into account journey time, as well as monetary cost, for each part of the journey. Travel arrangements should be planned and booked as early as possible, to benefit from any early booking discounts.

Expense claims must include the start and end point of each journey, and the reason for travelling. This information is necessary for all modes of travel.

Authorisation to travel

All overseas travel, and any other travel arrangements costing or likely to cost more than £100 for the whole trip, must be authorised prior to booking, via completion of the United Synagogue travel authorisation form (Appendix 2).

Travel Authorisation Form

Once complete, the form must be duly authorised by the relevant Director or the Chief Operating Officer.

For all central departments and functions, where there is any element of travel overseas, or where the total cost of travel is expected to be above **£250**, the form **must** also be approved by the Chief Executive.

A copy of the completed form must be retained by the authorising Director.

Group travel

Where more than one employee is travelling to the same event, a consolidated set of travel authorisation forms must be submitted for approval, including an appropriately detailed explanation of why that level of participation is necessary and justified, together with the overall cost of the trip to the organisation.

Information

The form must be fully completed, including (as applicable), details of the journey, reason for travel, (including business objectives), mode of transport (i.e., air, rail, or road), accommodation and itinerary, length of stay, together with confirmation of any portion of the trip that is personal. In addition, you must also declare on the form, that you have actively considered alternatives such as, teleconferencing, and web conferencing, before deciding that travel was necessary.

Booking

Once the travel authorisation form has been approved, booking of tickets and other travel arrangements may proceed. A copy of this form must then be attached to, or scanned and submitted with, the relevant expense claim, and/or related invoices as appropriate.

Taxis

Public transport should be used wherever possible, except where it is either impractical, or inappropriate. In such cases, smartphone app-based private hire companies, such as Uber, Bolt and

Kabbee, or reputable licenced minicab companies, usually offer better value for money, compared with the traditional London Black Cab. Taxis should be paid for, and costs reclaimed, in the normal way.

For travel to and from airports, use of a minicab or taxi is only acceptable, if it is impractical, inappropriate, or not possible to use public transport. In such circumstances, taxis should be pre-booked wherever possible, in order to secure the lowest rates.

Trains

Individuals should travel by standard class. Where possible, tickets should always be booked in advance, using an online service such as [trainline.com](https://www.trainline.com), or [redspottedhanky.com](https://www.redspottedhanky.com), [Uber.com](https://www.uber.com), or similar, as these websites often offer tickets at substantial discounts, on operator's standard prices. Expensive flexible tickets, offering varied return times, should not be purchased. If such a ticket is required for business reasons, this should be approved by the individual's line manager or expense approver, prior to booking.

Air travel

Air travel should only be used when it is the most economic, and practical method of travel. Flights must be booked as far in advance as possible, in order to secure discounted fares. The most cost-effective ticketing arrangements must be used. All air travel **must** be authorised prior to booking, by completing the US Travel Authorisation Form (Appendix 2).

Air travel on United Synagogue business should be economy class. Where available, premium economy will only be considered for long haul flights, provided this has been approved in advance by the individual's line manager or expenses approver, on a completed US Travel Authorisation Form. Travel to Israel is **not** considered to be long haul travel, for this purpose.

Air travel around the UK is not permitted, if the train is a viable, more appropriate, and cost-effective method of travel for the journey.

Expensive flexible tickets, offering varied return flight times, should not be purchased. If such a ticket is required for business reasons, this should be approved by the individual's expenses approver, prior to booking.

Late-night travel home from work

Where an individual works past 21:00hrs and wishes to take a taxi home for safety reasons, the cost of travel may be reclaimed, provided (where possible), the prior approval of the individual's expense approver has been obtained.

Motor car, motorcycle, and bicycle expenses

Business travel by motor car should only be undertaken, if other more cost-effective and lower carbon modes of transport are not available or are impractical. It is the sole responsibility of the individual concerned, to ensure that they are properly insured, (i.e., fully comprehensive, and full business use), before using their personal vehicle to travel on United Synagogue business.

In the event of an insurance claim, the United Synagogue will not pay any excess charges levied by an individual's insurance provider.

With regard to the use of private vehicles for business travel, the following rules apply:

- individuals are responsible for ensuring that their vehicle is appropriately insured, taxed and roadworthy
- employees must keep an accurate, and detailed (monthly) record, of their business mileage in each tax year (6th April to 5th April), to justify the rates of mileage allowance claimed.

- fines for traffic and/or parking offences will not be reimbursed.

Where it is cost-effective to make a business journey by private car, motorcycle, or bicycle, employees may claim a mileage allowance as set out in Table 2 below:

Allowance	Pence per mile
Car: first 10,000 business miles in tax year	55
Business mileage over 10,000 miles in tax year	25
Bicycle rate	20
Motorcycle rate	24

TABLE 2 – PRIVATE VEHICLE MILEAGE ALLOWANCE RATES

Tolls, Congestion or ULEZ charges, and Parking expenses

In general, employees and volunteers are expected to use public transport, when traveling into central London on United Synagogue business. Except where this is impractical, for example; if transporting heavy or bulky items etc.

Tolls, Congestion and/or Ultra Low Emission Zone (ULEZ) charges, and parking fees, are reimbursable while travelling on United Synagogue business. Individuals should obtain an official receipt, to substantiate their claim. Where a receipt is unavailable, a record of the date, time, and cost, should be kept, and provided with the corresponding expenses claim form or online.

Fines and/or interest charges, arising from either late, or non-payment of the above, are the responsibility of the individual, and will **not** be reimbursed.

Travel by Company Car

Employees are responsible for keeping their company vehicle in a state of good general repair. The cost of servicing and repairs are reimbursable, subject to agreement with the employee's line manager/expenses approver. The cost of insuring the car on behalf of the employee is also borne by the United Synagogue, however where there is an additional cost for including, (at the employee's request), additional named drivers, this cost will be passed on to the employee.

Employees provided with a fully expensed company vehicle, are not permitted to claim business mileage. Employees with a company vehicle, which is not fully expensed, may claim reimbursement for any exclusively business-related travel. **Personal mileage or fuel costs are not reimbursable under any circumstances.**

Where permitted, employees using a company vehicle, may claim a mileage allowance as set out in Tables 3a & 3b below:

Engine size	Petrol	LPG
1400 cc or less	14p	11p
1401 cc to 2000 cc	17p	13p
Over 2000 cc	26p	21p

TABLE 3A – COMPANY VEHICLE MILEAGE ALLOWANCE RATES (PETROL & LPG)

Engine size	Diesel
-------------	--------

1600cc or less	15p
1601cc to 2000cc	17p
Over 2000cc	23p

TABLE 3B – COMPANY VEHICLE MILEAGE ALLOWANCE RATES (DIESEL)

Hybrid cars are treated as either petrol or diesel cars for this purpose.

The rate for fully electric cars is 8 pence per mile when using a home charger and 14 pence per mile when using a public charger.

All rates are reviewed and updated periodically, in line with HMRC published advisory mileage rates.

[HMRC Advisory rates for business mileage using a company vehicle](#) and

[HMRC Advisory rates for business mileage using a private vehicle](#)

Hire vehicles

Where approved by an individual's line manager or expenses approver, a vehicle may be hired for business use. Both the cost of hire and fuel may be reclaimed if incurred by the individual directly, subject to the production of receipts. The hire vehicle must be used exclusively for business purposes, with no element of private use. The vehicle hired must also be the lowest, (most cost effective), category or class, fit for purpose.

Overnight accommodation

If an employee, or volunteer is required to stay away from home overnight, on United Synagogue business, the expenditure must be pre-approved, by the individual's line manager or expenses approver. Accommodation should also be booked as far in advance as possible, to get the best rates.

Type of accommodation

The most cost-effective suitable accommodation, must always be used. In most cases, this will be a single room in a budget hotel, (or similar).

Multiple trips and multiple bookings

If more than one employee, or volunteer is travelling to the same destination, the booking should be made at the same time, to obtain the best possible rates.

Spouses and Partners

Where an employee is to be accompanied by a spouse or partner in an official capacity, this must be approved in advance, by the appropriate Director or FR, before expenses may be claimed in respect of both.

Where an employee is to be accompanied by a spouse or partner in an unofficial capacity, expenses may not be claimed in respect of that spouse or partner. For example; where a double room is booked instead of a single room, the employee must restrict their claim to the cost of a single room, where lower.

Any exceptions to the above, must be approved (in writing), by the appropriate Director, on a case-by-case basis. This written approval must then be attached (scanned) to the online claim or for Kashrut, to the corresponding expenses claim form.

Foreign Currency

Where the exact Sterling amount is known, this should be the amount reclaimed, (e.g. if the employee's credit card bill has arrived before the claim is made).

Where the Sterling amount is not known at the time the claim is submitted, the amount should be translated using the average rate for the month of the claim, (as taken from oanda.com/fx-for-business/historical-rates), allowing for commission charges where incurred.

Advances

It is not standard policy to grant advances, in respect of travel and subsistence. In exceptional circumstances, advances may be granted to members of staff, with the approval of their director or the Chief Operating Officer. All receipts must be retained, and related expenditure accounted for, on an expense claim, once an individual returns from their trip.

Subsistence

Employees and volunteers should not be financially disadvantaged, when attending to United Synagogue business, away from their normal working location. If an individual is working away from their normal working location, and the cost of lunch is more expensive than would normally have been incurred, any additional costs may be claimed, up to a limit of £10 per day. The receipt, showing the total cost incurred should be provided, stating that only the excess, or additional cost, is being claimed.

Subsistence when staying away overnight

The United Synagogue will reimburse reasonable out-of-pocket expenses, when a journey on United Synagogue business, makes it necessary to stay away from home overnight. Individuals may claim (against a valid receipt), up to the following amounts, for each night whilst they are away:

- Evening meal including a beverage per night – UK £35.00
- Evening meal including a beverage per night – Overseas £40.00
- Breakfast when not included within the accommodation costs – UK £15.00
- Breakfast when not included within the accommodation costs – Overseas £20.00

Subsistence – early start or late finish

If an employee is not away from home overnight, but must either work late, or start early, because of United Synagogue business, then they can claim reasonable out of pocket expenses for subsistence. This includes early starts when travelling. All amounts quoted below, are the limits of actual expenditure that the United Synagogue will reimburse, against a valid receipt. Prior approval is required, and will only be given in the following circumstances:

- *Early start* – if you are required to start work by 07:00 hours, or required to work away from your usual office, and need to begin your journey by 7.00am, expenses up to £10 per day may be claimed towards subsistence, to cover breakfast, coffee, sandwich etc.
- *Working late* – if you are required to work beyond 21:00 hours, and food has not been provided, an evening meal may be purchased, up to the value of £25.00
- Limitations on the reimbursements are that:
 - early start or late finish should not follow a regular pattern, and
 - must be for business necessity

Housing

Housing is provided for a small minority of employees, for the better performance of their duties. This may be purchased or rented by the United Synagogue, subject to the terms and conditions of the

employee's contract of employment, and the signing of a Housing Licence, as agreed with the United Synagogue HR and Property departments.

Any rental agreement must be drawn up by the United Synagogue Property department. Where a property is purchased or rented, for the better performance of a minister's duties, the provision is usually non-taxable. Buildings Insurance on United Synagogue owned or rented properties, is the responsibility of the United Synagogue. Subject to the provisions of the individual employee's contract of employment, Council tax may also be borne by the United Synagogue. Unless agreed otherwise on an individual's contract of employment, the following conditions apply:

Utility Bills

Utility bills including gas, electricity, and water rates, are the responsibility of the employee.

Internet Connection

Internet connection costs are the responsibility of the employee.

Home Cleaning

Domestic cleaning costs cannot normally be reclaimed. Where, in exceptional circumstances, a particular need for cleaning services, arises because of a United Synagogue event or activity, in the home of an employee, these costs can be reclaimed in full, subject to the provision of an official receipt. Such costs must be approved in advance, by the employee's line manager or expenses approver.

Home Repairs

Where damage has been caused to the home of an employee because of United Synagogue hospitality, whichever is the lower, of the cost of making good that damage, or the cost of the excess on an employee's Home Insurance Policy, should be reclaimed in full, up to a maximum of £250, and subject to prior agreement with the employee's line manager or expenses approver. All other internal repairs and decorating are the responsibility of the employee.

The United Synagogue will bear the cost of necessary external repairs on a United Synagogue property, subject to prior agreement with the employee's line manager or FR, in consultation with the United Synagogue Property department.

Home contents insurance

Home contents insurance costs are the responsibility of the employee.

Mobile phones

Where a mobile phone is needed for business purposes, the employee's line manager or FR must contact the IT department, to confirm their approval, and request an appropriate handset (and tariff), be provided to the employee concerned.

Mobile phones - working abroad

If an employee travels abroad for work and needs to use their company provided mobile handset whilst overseas, they must inform the IT department of this trip, including the dates of travel, destination(s), and what services they will require. Whilst abroad, usage should be kept to a minimum. If the IT department are not made aware of an individual's trip, their phone may be limited and/or blocked whilst overseas.

N.B: 'Overseas' for these purposes, means anywhere that is not Mainland England, Scotland, Wales and Northern Ireland.

Entertaining expenses

Entertaining – Rabbis

Where guests are hosted for a meal, by a community Rabbi, as part of their normal duties. The cost of doing so, may be reclaimed on a per head basis, as set out below. Costs can only be claimed for guests, **costs cannot be reclaimed for the Rabbi, Rebbetzen, members of their own family, or guests under 5 years of age.**

The following rates apply:

Shabbat and Yom tov (Dinner or Lunch):	£22 per guest
Shabbat Seuda Shlishit and Dinner or Lunch at other times:	£16.50 per guest

All rates are increased by £5 per guest at Pesach to cover increased costs at that time of year.

The rates set, cover food, drink, use of utilities, and cleaning costs. These rates are reviewed annually.

In order to claim entertaining expenses, the names of all the guests hosted, **must** be included on the expenses claim.

Snack food and drinks, (tea, coffee, milk, soft drinks, crisps, and biscuits), should be claimed in full, with relevant receipts provided with the claim.

The number of guests to be entertained by the Rabbi and Rebbetzen, must be agreed periodically in advance with the FR, to ensure that expenditure in this area is in line with respective synagogue budgets.

Rabbinic entertaining of colleagues

Rabbis may claim reimbursement for entertaining their assistant Rabbi and/or Youth Directors and their families, no more than once a year.

Member entertaining – Professional staff

Under certain specific circumstances, entertaining local Honorary Officers and/or Trustees is justified. Where an employee claims reimbursement for a restaurant meal, this must be pre-approved by the employee's line manager or expenses approver, and proper receipts must be provided with the expense claim. Employees are required to entertain in a London Beth Din approved restaurant, wherever possible.

Professional and staff entertaining

Once again, in certain very limited circumstances, entertaining external professionals and/or members of staff can be both necessary and justified. All claims for professional and staff entertaining must also be pre-approved by the employee's line manager or expenses approver, and details of the individuals entertained, together with proper receipts, must be provided with the expense claim.

Catering for internal meetings

Catering should not routinely be provided for staff meetings attended entirely, or mostly by United Synagogue employees, (especially meetings involving only staff from head office). However, in some situations such as, staff training sessions, or evening meetings, attended by Honorary Officers and Lay leaders etc, it may be appropriate to provide catering for these meetings. All claims must again be pre-approved by the employee's line manager or expenses approver, and details of attendees, together with proper receipts must be provided with the expense claim.

Professional training and subscriptions

External seminars and training courses

If a professional seminar or staff training course is deemed to provide a business benefit to the United Synagogue, staff should gain approval from the appropriate Director, prior to booking a place. All training courses should be approved by, and arranged through, the HR Department.

Professional subscriptions

If an employee is a member of a professional body, they may claim the cost of the annual subscription, provided that the membership activities are directly relevant to, and in support of, the individual's role and duties within the United Synagogue.

If an employee is required by the United Synagogue, to train for a qualification, which in turn involves admittance to a professional body, the United Synagogue will reimburse the annual subscription to that body.

All such subscriptions must be properly budgeted for, and approved by the appropriate Director.

Staff welfare

Display Screen Equipment (DSE) users

In accordance with the Health and Safety Executive guidelines on users of Display Screen Equipment (DSE), The United Synagogue will reimburse the cost of an eye test (on request), for employees that use DSE for a significant part of their normal work, i.e., daily, for continuous periods of an hour or more. If following the eye test, the employee is prescribed glasses necessary for DSE work, the United Synagogue will contribute up to a maximum of £100 towards the cost of the initial eye test, frames, and lenses. Reimbursement on this is limited to one claim every two years.

Babysitting

With prior approval from an employee's line manager or expenses approver, babysitting costs may be payable for a minority of employees, on an occasional basis, where such costs are unavoidable for the better performance of that employee's duties. As with all other expenses, a proper invoice or receipt must be provided with the expense claim, in order to be reimbursed. Under HMRC rules, reimbursements for babysitting costs are treated as a taxable benefit and must therefore be clearly identified on the corresponding expense claim, so that amounts can subsequently be declared on the respective employee's P11D return.

Appendix 1 - Expenses Claim Form

MILEAGE CLAIM DETAILS

Synagogue: _____

[illegible]

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ENTERTAINING CLAIM DETAILS

Month/Period: _____

Synagogue: _____

Date of Hospitality (dd/mm/yyyy)	Type of Meal	Names	Number of people	Amount Claimed
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[illegible]

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Appendix 2 - United Synagogue Travel Authorisation Form



TRAVEL AUTHORISATION FORM

Please fill out Travel Authorisation form & obtain approval **prior** to making reservations.

International travel may require a passport and/or visa.

Is travel being booked at least 7 days in advance? Yes ☐ No ☐

If no, please explain _____

Only Economy class fare is reimbursable Estimated cost of trip £ _____

TRAVELLER'S NAME		TELEPHONE NUMBER:		BUDGET COST CENTRE	
DEPARTMENT AND LOCATION:		PROJECT NAME:		TRAVEL ARRANGED BY:	
IS TRAVEL ABSOLUTELY NECESSARY?		Yes ☐ No ☐ Please explain rationale for proposing travel and not an alternative, e.g. remote conferencing.			
PURPOSE OF TRIP (including tangible objectives)					
				Mode of travel	
				AIR ☐	
				Train ☐	
				Other ☐	
ITINERARY					
FROM	TO	DATE	DEPARTURE TIME		
Traveling Alone ☐ With Colleagues ☐ With Spouse ☐ Other (please specify) ☐					
CAR RENTAL NEEDED? NO YES (IF YES PLEASE COMPLETE INFORMATION BELOW)					
CITY	NUMBER OF DAYS	GRADE/TYPE OF VEHICLE	SPECIAL INFORMATION		
HOTEL NEEDED? NO YES (IF YES PLEASE COMPLETE INFORMATION BELOW)					
CITY	DATE(S)	HOTEL NAME (if known)	APPROXIMATE DAILY TARRIF		
IS ANY PORTION OF THIS TRIP PERSONAL? NO YES IF YES, PLEASE EXPLAIN.					
EMPLOYEE SIGNATURE		DATE		Director Approval	
				DATE	
Notes/Additional Info				Chief Executive Approval	
				DATE	