

# DISABILITY POSITIVE VOLUNTEER EXPENSES POLICY

## *Revision History*

<i>Version</i>	<i>Revision Date</i>	<i>Revised by</i>	<i>Section Revised</i>
1.1	14.10.2020	VA/LT	1, 5 and 6
	05.11.2021	Annual Review – no changes	

## *Document Control*

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## 1 POLICY STATEMENT

**Disability Positive** (*hereinafter referred to as the “Company”*) understands that a clear volunteer expenses policy is crucial to the success of the business and to ensure regulatory, statutory and legal compliance with the relevant rules and laws.

The Company is very grateful to the vast majority of volunteers for not only providing their time free, but also choosing to meet incidental expenses from within their own resources, (i.e. at no charge to the Company). Otherwise, with the number of volunteers involved, we could not afford to deliver all of our services for disabled people at the current levels of scale and quality.

However, should volunteers wish to claim reasonable and proper out of pocket expenses, volunteers can complete a **Volunteer Expenses Claim Form**

## 2 PURPOSE

This purpose of this policy is to ensure that where the Company have obligations under laws, regulations and/or codes of conduct, all volunteers are provided with clear guidance on what constitutes reasonable and proper expenses, and the process for claiming; with the aim of ensuring adherence to, and compliance with, such requirements.

## 3 SCOPE

This policy applies to all volunteers within the Company and pertains to the processing of personal information.

## 4 PRINCIPLES

The Company's policy follows relevant guidance on payment of expenses; therefore, claims for, and payment of, expenses must be consistent with the following principles:

1. Expenses are refunds by the Company of payments which the staff member has needed to meet personally, in order to carry out their duties.
2. Expenditure should be made by the most cost effective means available. Transport by train should be second class. Wherever possible train travel should be booked sufficiently in advance to take advantage of the better value tickets available.
3. Evidence must be provided that the expenditure has been incurred. Please note that the Company auditors require that every expense claim is fully supported with tickets and receipts. These should be attached to travel claim forms.

## 5 ALLOWABLE EXPENSES

The Company consider the following legitimate expenses;

- the reasonable cost of travelling to and from home and the volunteer placement, including train and bus tickets and taxi fares where necessarily incurred, and petrol allowances permitted by the HMRC before tax becomes payable (please see section on travel below). If using your own car for Company activity, you must also provide valid Business Class motor insurance cover.
- the reasonable costs of personal assistance support, provided that it is agreed in advance, and in circumstances where a volunteer would otherwise be caused hardship or would be prevented from participating in a volunteer placement (please see section on personal assistance support below);
- the reasonable costs of childcare, provided that it is agreed in advance, and in circumstances where a volunteer would otherwise be caused hardship or would be prevented from participating in a volunteer placement (please see section on childcare below);
- Reasonable subsistence while attending a volunteer placement that is greater than 4 consecutive hours in any one day, (please see section on subsistence below);

## 6 PROCESS FOR CLAIMING EXPENSES

All expense claims should be submitted on a Volunteer Expense claim form and sent to the Training and Volunteer Manager together with the relevant mileage record and receipts for all costs. Details of expenditure should be itemised (i.e. Travel subsistence given separately) with the date for each, together with start and end times. Volunteer Expenses Claim Forms are available from the Training and Volunteer Manager.

Expense claims should be made at regular intervals and calendar monthly, (preferably by 10<sup>th</sup> of every month, for the period 1<sup>st</sup> – 31<sup>st</sup> of the previous month). All expenses for the current financial year should be claimed by 31<sup>st</sup> March in that year. Any claims pertaining to the previous financial year made after 31<sup>st</sup> March will not be paid.

### Travel by Car

- The Company will pay 45p/mile for any round trip up to 350 miles.
- On a longer round trip, the first 350 miles will be reimbursed at 45p/mile, and all mileage over 350 miles will be reimbursed at 25p/mile.
- The Company will not pay for any claim that exceeds the mileage calculator as per 'AA Route Planner'.
- Parking at the meeting venue may be claimed (if free parking is unavailable) and must be evidenced by a receipt.
- Motoring and Parking fines will not be paid.

## Travel by Motorcycle

- The Company will pay 24p/mile for any individual round trip.
- The Company will not pay for any claim that exceeds the mileage calculator as per 'AA Route Planner'.
- Parking at the meeting venue may be claimed (if free parking is unavailable) and must be evidenced by a receipt.
- Motoring and parking fines will not be paid.

## Travel by Public Transport

- Train, coach, tube or taxi fares may be claimed and must be evidenced by a receipt.
- Train travel must be 2nd class/economy class.

## Personal Assistant Support

- Only hours directly related to the attendance at a Volunteer placements/events can be claimed provided that these are not already covered within a social care support plan, provided this has been approved by a Senior Manager in advance. **Please note: If any volunteer has a Personal Health Budget, then as this is fully funded NHS care, no 'top ups' will be possible to the associated account.**
- In order to allow for variable rates in personal assistance support costs, a rate of payment and the period for which care costs will be payable, must be agreed in advance between the Volunteer and the Training and Volunteer Manager. Agreed costs will be paid to the Volunteer upon presentation of a personal assistant support claim form, or invoice (if support is an agency worker).
- The Company will not normally pay for 24-hour care, and will not make payment to a Volunteer's partner, spouse or other "Connected Person". Within this framework of reasonable costs agreed in advance with the Company, the choice of carer, and responsibility for that choice lies with the Volunteer.
- A separate form will need to be completed for these expenses, reference "Personal Assistant Support claim form" (obtainable from the Training and Volunteer Manager). **Please note: expenses claim submitted by volunteers for personal assistance support, will be transferred separately from the Company into the associated Personal Budget account, so that the Local Authority can continue to fully audit the care funds within the account. No payment will be made into a personal account.**

## Childcare

- Only hours directly related to the attendance at volunteer placements/events can be claimed, provided this has been approved by a Senior Manager in advance.
- In order to allow for variable rates in childcare costs, a rate of payment and the period for which care costs will be payable, must be agreed in advance between the volunteer and the Training and Volunteer Manager. Agreed costs will be paid to the Volunteer upon presentation of an invoice or receipts.

- The Company will not normally pay for 24-hour care, and will not make payment to a Volunteer's partner, spouse or other "Connected Person". Within this framework of reasonable costs agreed in advance with the Company, the choice of carer, and responsibility for that choice lies with the Volunteer.

### **Subsistence**

- In normal circumstances the Company will reimburse Volunteers lunch at a maximum of £5 when volunteering for more than 4 consecutive hours in any one day, this must be supported by a receipt.
- In the exceptional circumstance, where a volunteer is asked by the Company to attend a pre-arranged evening event (i.e. an Award evening), the Company will cover the cost of food up to a maximum of £25 for an evening meal.
- The Company will not pay for the cost of alcoholic drinks.

## **7 PAYMENT OF EXPENSES**

The Company prefers volunteers to have expenses paid directly into their personal bank account (or Personal Budget account for personal assistance support). Please contact the Training and Volunteer Manager, with a note of your account number and sorting code, and this will be set up for you. The advantage of this method of payment is that it can be arranged within a few days of receiving your claim and will save you having to visit the bank to deposit a cheque in your account.

## **8 ADDRESS FOR VOLUNTEER EXPENSES CLAIMS**

### **By Email**

[wiki@disabilitypositive.org](mailto:wiki@disabilitypositive.org)

### **By Post**

Viki Atherton  
Training and Volunteer Manager  
Disability Positive  
Sension House, Denton Drive, Northwich, Cheshire, CW9 7LU.