

**INVOLVEMENT AND
VOLUNTEERING EXPENSES
POLICY**

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CONTENTS

	PAGE NO
1.0 Aims and Objectives	3
2.0 Areas for Reimbursement	3
2.1 Child Care	3
2.2 Elderly or Dependent Care	4
2.3 Specific Requirements	4
2.4 Travel	4
• Train	4
• Own Vehicle	5
• Car Sharing	5
• Taxi	5
• Air Travel	5
• Bus/tube or similar form of transport	5
2.5 Overnight Accommodation	6
2.6 Meal Allowances	6
2.7 Loss of Earnings	6
2.8 Miscellaneous Costs	6
3.0 Claiming back your expenses	
3.1 Completing your claim	7
3.2 Involvement Locally and Regionally	7
3.3 Involvement Nationally – Personal Float	7
APPENDICES	
1 Summary of Allowances and Expenses	
Claim Amounts	8
2 Personal Circumstances Form	9
3 Expenses Claim Form	10 & 11
4 Personal Float Application Form	12

Involvement and Volunteering: Expenses Policy

AIMS AND OBJECTIVES

Involvement

The involvement of customers and clients is crucial in helping us to deliver exceptional services that are designed around what you, our customers and clients want and need now and in the future.

Volunteering

Volunteering has many benefits for our customers, clients and service users because it brings new skills, experience and knowledge into our business and allows us to achieve more together. It also provides the volunteer with an opportunity to learn and develop personally and to contribute to society in a way that suits their skills and passions.

We appreciate you give your time, your experience, your ideas and skills. We don't expect you to be out of pocket in the process!

The aim of this policy is to support you to get involved and to take up volunteering opportunities and to set out the expenses we will reimburse for your time.

Out of pocket expenses which are reimbursed against receipts are not generally liable for taxation and should not affect your benefits if you are claiming them.

For more information please visit Volunteering England:

General

<http://www.volunteering.org.uk/Managing+Volunteers/information/on-lineinformationsheets/>

or contact your local Citizen's Advice Bureau

AREAS FOR REIMBURSEMENT

INVOLVEMENT

To help you get involved these are the areas where we will reimburse your expenses against receipts. **A summary of the expenses we will reimburse is attached at Appendix 1.**

Child Care

For customer and client involvement events we will cover the cost of a **registered carer**. If you are using a non registered carer please discuss this with an involvement colleague in advance.

When becoming involved please discuss your childcare needs in advance so that we can agree arrangements.

You will need to complete the *Personal Circumstances Form* attached (Appendix 2) and we will reimburse you for the actual costs. You will also need to attach an invoice to your expenses claim form.

Claiming care costs could affect your benefits if you are claiming or your tax status if you are a tax payer. For more information about this, please see the information sheet from Volunteering England or contact you local Citizen's Advice Bureau

<http://www.volunteering.org.uk/Managing+Volunteers/goodpracticebank/Information/volunteercareexpenses.htm>

Care arrangements for elderly or dependent relative(s)

We will reimburse costs in similar circumstances to childcare. If the adult you care for prefers to be cared for by a non registered carer please discuss this with an involvement colleague. Your involvement should not affect your Carer's Allowance, as long as you are still caring for a disabled person, who is receiving a qualifying benefit, for at least 35 hours a week. However, we strongly recommend that you check this with your Benefits Advisor in advance to make sure that you will still meet the requirement of 35 hours per week.

For more information about how reimbursement can affect your carer's allowance, please visit:

<http://www.volunteering.org.uk/Managing+Volunteers/goodpracticebank/Information/volunteercareexpenses.htm>

Customer and Clients with specific requirements

If you have specific needs, we will support you to become involved. This means we will provide the support required to enable you to join in for example Interpreters, audio, Braille, etc.

Travel

We will cover travel costs **directly** related to your involvement. As we are committed to being environmentally friendly and delivering best value for money, we will expect you to use the most cost effective and efficient way of travelling.

Train - We use a travel agent for train tickets which need to be booked by a member of our staff in advance. Please give as much notice as possible, with full details of the meeting, so staff can get the right tickets.

All train travel should be standard class.

We will reimburse the cost of a railcard if you provide a receipt. We can use the railcard to get a discount with our travel agent, so please let us know if you

have one. You can get a railcard if you are aged 16-25, over 60 or meet the requirements for a disabled person's card. More information can be found at:

<http://www.railcard.co.uk/>

In cases of long distance travel, going by train is our preferred method of transport – not only will this be more cost effective, but it is significantly safer for customers or clients driving long distances.

Use of your own vehicle – we will cover the expense of using your own vehicle based on the cost of the cheapest available public transport fare available, or the mileage if it is lower, unless:

- You have a medical condition or disability which means you are unable to travel on public transport and you have signed the *Personal Circumstances Form* (Appendix 2)
- There is no suitable public transport in the area (e.g. you live in a rural area).
- The timing of your meeting does not allow you to get there at a reasonable time for example early morning/late evening.

It is your responsibility to ensure that your insurance policy covers you whilst you are involved. We will reimburse any additional premiums you may incur for this.

NB: For customers/clients who receive any income support or incapacity benefits and who own a motability car, the Department of Works and Pension advise claiming the full mileage allowance could affect your benefits. Please seek clarification with your Benefits Advisor and tell us if you need to claim less for your mileage.

When using your own vehicle the cost of parking and road, tunnel and bridge tolls incurred during the journey will also be covered. We do not reimburse for parking fines, speeding fines or clamping fines.

Car sharing – we encourage car sharing if it can be shown that this is better value for money than public transport. Claims for mileage will be accepted by the driver of the car. It is your responsibility to ensure that your car is roadworthy and your insurance policy covers such car sharing arrangements and we will reimburse any additional premiums you may incur for this.

Taxi – for urgent, safety or mobility reasons or where no public or private transport is reasonably or conveniently available, the costs of a taxi will be reimbursed **if a receipt is provided**. This needs to be agreed in advance where possible.

Air travel should only be used, and booked by a member of staff, when:

- There is no practical alternative.
- It is cheaper.
- The urgency of the journey justifies the extra cost, e.g. an emergency at home.
- Advance written permission of this is obtained from the relevant customer or client involvement staff member.

Bus/Tube – we will cover the actual cost of your bus, tube (or similar form of transport) fares in your involvement.

- Expenses relating to travel must directly relate to your involvement role and must be reasonable and planned.
- We cannot reimburse you for extra journeys which are not related to your involvement activity. Claims submitted that include any unofficial journeys (or part-of the journey) must be made clear on your expenses claim form.

Overnight Accommodation

Where an overnight stay is necessary, (for example you live over 3 hours away, the meeting has an early start or you have a medical condition or disability) we will arrange for suitable overnight accommodation and subsistence (breakfast and evening meal if appropriate).

- We aim to book clean and well maintained accommodation at a reasonable cost.
- Overnight accommodation should always be booked by a member of Home staff through our travel agent. Staff will book accommodation in advance and make use of any available discounts for advanced bookings, where available. Customers and clients should give staff as much information (about disabilities etc) and notice as possible in order for them to book the right accommodation.
- If hotels are not available at the agreed rate, staff have the authority to book hotels above this rate.

Meal Allowance

We will reimburse you with a meal allowance if you are away from home at the agreed rates. If there is nothing available at these rates, we will reimburse the actual costs of a meal and one soft drink. **We do not reimburse for any alcoholic drinks.** Receipts must be attached to your expenses claim form.

If you are staying overnight at a hotel, we will arrange for breakfast and evening meal as appropriate, and this will be billed direct to Home.

Loss of Earnings

We want to ensure that people who are working have the opportunity to get involved so we will plan our activities at different times and days. In cases where this is not possible, we will arrange to reimburse loss of earnings if you have taken **unpaid** leave – however, this has to be agreed before the event.

In those cases:

- You will need to complete the *Personal Circumstances Form* (Appendix 2) which sets out your employer's details and your gross hourly rate of pay.
- You will need to provide a letter from your employer confirming you have taken unpaid leave.
- We will reimburse you for the hours lost

Miscellaneous Costs - telephone, photocopying, ink cartridges, etc

We will cover any actual costs in relation to items, such as telephone charges or photocopying costs if you cannot use one of our offices, to be agreed in advance. We will cover a contribution towards mobile phone costs which you can claim at meetings or through your float using a receipt slip.

We will buy and supply materials or equipment etc which you may need for carrying out your involvement activity.

We will cover the actual cost (a maximum of) two printer cartridges per year, to be agreed in advance.

CLAIMING BACK YOUR EXPENSES

Completing your claim

We will reimburse your expenses as quickly as possible, please:

- Complete an expenses claim form (Appendix 3).
- Sign and submit it as quickly as possible to the Leeds Office.
- Attach receipts.
- Show expenditure on your expenses form where you do not have a receipt.
- Write your form clearly.

Expenses will be checked for accuracy. **Fraudulent claims will be taken very seriously.**

Where you are reimbursed by BACS your expenses claim will usually take no longer than one working week to be transferred into your bank account. It may take up to two working weeks in the event of a Bank Holiday. Please complete the BACS information on the Personal Float Application (Appendix 5).

Where you are reimbursed by cheque, it will usually be issued within one working week.

Involvement Locally and Regionally

If you are participating in a local involvement activity at one of our offices, there will be a float to enable you to claim back out of pocket expenses for that day, against receipts up to the agreed limit.

Involvement Nationally

If you are participating in a national activity on a regular basis you or your Service will have access to a personal float up to £100

All expenses must be recorded using the standard procedure on Home's expense form (Appendix 3). Funds will be topped up to your personal float as and when necessary.

If you hold a personal float you will be asked to complete the *Personal Circumstances Form* (Appendix 2) setting out that you will repay the funds back to Home if/when:

- You cease your involvement with Home.
- You end your tenancy with Home.
- The support you receive from Stonham ends.

You will need to complete a “Personal Float Application Form” (Appendix 4)

To help you complete your expenses claim form or if you have any queries, please speak to a member of staff.

VOLUNTEERING

Travel

As a volunteer you are entitled to claim travel expenses as per the involvement section for travel to and from your volunteering placement. In exceptional circumstances where you may to travel to different areas for your role; train tickets can be arranged through Home Group’s online booking system. You should discuss this with your manager and these can be booked in the local service or office where you are based. For advice on the amounts for travel please see appendix 1.

Meal Allowance

If you are volunteering for a full day over a lunch time then you may be entitled to claim a meal allowance for your lunch. Please discuss this with your line manager beforehand to agree amounts and the processes for claiming. Receipts must be provided to claim meal expenses.

Childcare

When considering a volunteering placement please discuss your childcare needs with the volunteer manager in advance so arrangements can be agreed. As per the involvement section of this policy we can only cover the costs of a **registered carer**. You will need to complete the *Personal Circumstances Form* (appendix 2) and you will also have to attach an invoice to your expenses claim form.

Claiming

You can claim expenses through petty cash in your local office or service or in some cases you may be able to claim your expenses through me@home. You can use the claim form attached (appendix 3).

Information about this policy

Policy owner	Donna Middleton	Date effective from	09 October 2013
Job Title	Director of Customer Contact Centre, Customer Service	Version No.	1.1
Policy Author (name and department)	Ronika Cunningham, Involvement Manager, Involvement team	Policy reference number	HG_GRP_CORP_092
Approved By	Volunteering governance group, Donna Middleton, Director Customer Service Centre	Next Review of Policy Due	09 October 2016
Date initial Equality Analysis carried out		Date(s) equality analysis reviewed	

Version history

Version No.	Description of Changes
1.1	Widening of scope to include volunteering as well as client / customer involvement Changes to permitted amounts claimable

SUMMARY OF ALLOWANCES AND EXPENSES CLAIM AMOUNTS

Activity	Permitted amount to be claimed
1 Registered carer	Actual Costs
3 Specific requirements	Actual costs
4 Travel <ul style="list-style-type: none"> • Mileage • Mileage with car share • motorcycle • Parking, road toll and tunnel charges 	45p per mile (car/van) 50p per mile 24p per mile Actual costs
5 Overnight Accommodation	Hotel - £100 per night maximum.
6 Meal Allowances <ul style="list-style-type: none"> • Breakfast • Lunch • Dinner • Snacks 	Maximum £10.00 Maximum £6.00 Maximum £20 Maximum £4.00
7 Loss of Earnings	Actual costs
8 Miscellaneous costs <ul style="list-style-type: none"> • Mobile phone contribution • Telephone charges, photocopying, email, fax, postage. • Printer Cartridges 	£5 per month in a month where a national meeting is being attended Actual costs Actual cost (maximum 2 per year)
Involvement Locally and Regionally	Maximum £100 claimed on day of event
Involvement National	Maximum personal float of £100

**INVOLVEMENT AND VOLUNTEERING
PERSONAL CIRCUMSTANCES FORM**

Please complete the relevant sections, sign and return to your relevant staff member if you are claiming any of the following expenses. It is a requirement of Home that this form is completed on an annual basis or as and when your circumstances change.

Child Care/Carer Responsibilities
 I confirm that I employ
 (name of registered carer/registered organisation) to provide care
 responsibility for my dependents on an hourly rate of £

Mileage
 I confirm that either due to a disability or medical condition or because there is
 no suitable public transport, I need to use my own vehicle for official travel for
 my activities with Home.

Please tick

FOR INVOLVEMENT ONLY-Loss of Earnings (unpaid leave only)
 I confirm my employer is.....

 (name and address of employer) and my gross hourly rate of pay is
 £.....

FOR INVOLVEMENT ONLY -Involvement Nationally
 I confirm that I will pay back the “float” if:

- I cease my involvement with Home, or
- I end my tenancy with Home, or
- The support I receive from Stonham ends

Please tick

Signed

Name (please print)

Address

.....

..... (inc post code)

Date.....

INVOLVEMENT AND VOLUNTEERING: EXPENSES CLAIM FORM

Full Name

Address

Post Code Day Time Phone No

Meetings/Activities/Events – Date and Venue

.....

.....

EXPENSES CLAIMED: *please attach receipts for all expenses claimed*

TRAVEL

<p>Mileage</p> <ul style="list-style-type: none"> • 45p per mile (car/van) • 50p car share • 24p per mile (motorcycle) • 20p per mile (cycle) 	<p>Please give a breakdown on your mileage claim:</p> <p>Total number of miles claimed</p> <p>If you are the driver of the vehicle, did you car-share? Yes <input type="checkbox"/> No <input type="checkbox"/></p>	<p>£.....</p>
<p>Other Travel (e.g. bus/tube/taxi/train/parking)</p>	<p>Please state:</p>	<p>£.....</p>

CARE EXPENSES

<p>Child Care Expenses <i>please submit invoice</i></p>	<p>Hours from To</p> <p>Or 24 hours/overnight (delete as appropriate)</p>	<p>£.....</p>
<p>Carer Expenses <i>please submit invoice</i></p>	<p>Hours: From To</p> <p>Or 24 hours/overnight (delete as appropriate)</p>	<p>£.....</p>

MEAL ALLOWANCES

<p>Please state:</p>	<p>£.....</p>
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OTHER EXPENSES

APPENDIX 3

<i>Please state any other expenses that you have incurred, such as telephone calls, stationery, photocopying, printer cartridges or any other miscellaneous costs – all these costs should be approved prior to your claim:</i>	£.....
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Expenses Sub Total Claim (travel + care expenses + meal allowances + other expenses)	£.....
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LOSS OF EARNINGS (Unpaid leave only)

..... Hours @ £..... per hour	£.....
<i>For office use only: after processing expenses claim through Accounts Payable, please forward to Payroll Department for processing loss of earnings claim.</i>	

Loss of Earnings Sub Total Claim	£.....
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TOTAL CLAIM (expenses sub total claim + loss of earnings sub total claim)	£.....
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- If you are claiming for Mileage, Carer Costs or Loss of Earnings please confirm you have completed, signed and returned the *Personal Circumstances Form* as appropriate Yes No (If no, please attach the completed form).
- If, for personal preference, you have chosen to drive and do not fit any of the criteria in the *Personal Circumstances Form*, you will only be able to claim the standard return fare or mileage whichever is lowest.
- If you require your expenses to be reimbursed by BACS, please confirm that you have completed the appropriate form giving your bank details Yes No (If no, please attach the completed form).

Signature of Involved Customer/Client or Volunteer

..... **Date**.....

Signature of Officer **Date**.....

<p style="color: red; margin: 0;"> If these expenses have been reimbursed out of the "Local Involvement Float" and are for recording purposes only please tick <input type="checkbox"/> Please do not pay loss of earnings out of Petty Cash/Local Involvement Float </p>
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By submitting and signing this expenses claim form, you are agreeing to Home's Involvement and Volunteering Expenses Policy

CUSTOMER AND CLIENT INVOLVEMENT ONLY
Personal Float Application

YOUR DETAILS

Full Name
Address
Post Code Day Time Phone No

BANK DETAILS

Name

Branch Address (including post code)
.....

Account No

Bank Sort Code

Account Name

By signing this form you agree to the following:

- You are involved in national activities on a regular basis.
- You will record all expenses using the standard procedure on Home’s expenses form.
- You will repay the funds back to Home if/when:
 - You cease your involvement with Home.
 - You end your tenancy with Home.
 - The support you receive from Stonham ends.

Signature of Customer/Client

I will pay back my float by cheque/ cash/ bank transfer (please circle preferred method)

Date

**Please complete, sign and return the form to the Involvement Team,
Meridian House, Artist Street, Armley Road, Leeds, LS12 2EW**