

## Volunteer Travel and Expenses Policy

<b>Date approved by the Connected Together CIC Board</b>	Reviewed and amended on 6 <sup>th</sup> August 2020.
<b>Author/Responsible Person</b>	Michelle Wright
<b>Next revision due</b>	6 <sup>th</sup> August 2023
<b>Staff/volunteer training delivered</b>	As part of induction and ongoing.
<b>Date sent to staff</b>	
<b>Checked for rebranding</b>	This policy covers Connected Together CIC and <i>all</i> its contracts and managed organisations, for example Healthwatch North Northamptonshire and West Northamptonshire (HWNW) and Healthwatch Rutland (HWR).
<b>Signed off by CEO</b>	Michelle Wright - 26/07/2022
	Kate Holt - 27/07/2022
<b>Checked By</b>	Catherine Maryon (CTCIC Director) - date

### Responsibilities

#### 1 CTCIC board

Have overall responsibility for volunteers within CTCIC

#### 2 CTCIC Chief Executive Officer (CEO)

CTCIC board have delegated to the CTCIC CEO the responsibility for developing a strategy, policies and procedures for volunteering at CTCIC and to ensure these are implemented effectively.

#### 3 CTCIC Staff and volunteers

All CTCIC staff and volunteers are required to read and implement the volunteer strategy, supporting policies and procedures.

## Volunteer Travel and Expenses Policy

### 1. Introduction

In carrying out Connected Together CIC's (CTCIC's) approved business and activities board members and volunteers could incur expenses. We want to be sure that everyone has an equal opportunity to take part in Connected Together activity and recognise that no-one should lose out through incurring costs associated with their volunteering.

CTCIC is funded by public money, and we are required to ensure that this money is disbursed in accordance with a policy and procedures aimed at fairness and good value for money. Travel and expenses account for a significant proportion of CTCIC's running costs. It is important that claims for reimbursement of travel and expenses are subject to close scrutiny in order to determine that it was necessary to spend that money in order to carry out work for CTCIC and all its contracts and managed organisations, including HWNW and HWR.

### 2. What expenses will be paid?

Board members and volunteers will be reimbursed for reasonable travel and associated expenses incurred solely and exclusively in the performance of their duties. Expenditure should be kept to the minimum consistent with the effective performance of work on behalf of CTCIC. The Chief Executive Officer (CEO) may refuse any claim that appears to be excessive.

All claims made for business travel and subsistence, other than mileage claims, must be for actual expenditure incurred and must be supported with **original receipts**. The subsistence rates given in page 5 of this policy are the normal maximum amounts that will be allowed. They should not be used as a flat rate without supporting receipts.

If you have any special requirements or are unsure whether you can make a claim this should be discussed with CTCIC's CEO, the volunteer lead officer or project lead. You are required to discuss this before spending money.

CTCIC will still reimburse travel costs incurred when a meeting has been cancelled at short notice where the representative was not informed of the cancellation before travelling.

### 3. Reimbursement of expenses

- Claims for reimbursement should be made on a Volunteers Monthly Expenses Claim Form available from the CTCIC office on 0300 002 0010 or by contacting the volunteer lead or project lead directly
- Claims for reimbursement should be made as soon as possible and, in any case, **not later than three months**. Claims submitted more than six months after the travel date will be automatically disallowed unless approval is sought from the CEO before the claim is submitted. Approval will only be given in exceptional circumstances
- Payment of travel expenses should conform to Her Majesty's Revenue and Customs (HMRC) requirements
- If claims are not fully completed, delays will occur, and the form will be returned to the claimant for further details and supporting evidence
- Claims must always be supported by **original receipts** or other supporting documentation. All receipts should be attached to the claim for reimbursement
- Completed forms will be first checked by the volunteer or project lead to ensure that all travel on Connected Together CIC business is justified and that all claims relating to that travel are in accordance with this policy
- Once agreed by the volunteer lead or project lead the claim will be passed to the CEO for authorisation
- Each entry must contain sufficient detail for the CEO to agree that the cost is a valid claim on Connected Together resources
- Authorisation of a claim will be taken to mean that the journeys were approved, the expenses were properly and necessarily incurred, the allowances are properly payable by CTCIC, and that consideration has been given to value for money in choosing the mode of transport
- This policy will apply whatever the source of funding e.g. from externally funded research grants and contracts etc.

### 4. Mode and class of travel

- Claimants should travel and be accommodated in safety and in reasonable comfort
- Wherever possible, and subject to business needs, travel reservations should be made in time to take advantage of cheaper fares or accommodation (e.g. off-peak)
- The mode of travel should be the most cost-effective consistent with the business needs of CTCIC

#### 4.1 Use of private vehicle

- The use of a private car should only be considered when it is the most cost-effective means of transport having taken into account the cost of travelling on public transport/using a hire car and the best use of staff and volunteer resources
- Advisor Board members and volunteers who use their private car on CTCIC business must ensure that their car is taxed, has a valid MOT certificate and is roadworthy
- They must also have insurance cover for business use
- Claimants using their private vehicles (car, van, motorcycle, or pedal cycle) for business travel should claim reimbursement at the mileage rates laid down in Travel and Subsistence Rates information detailed at page 5 of this policy

#### 4.2 Car parking

- CTCIC will reimburse all expenses for car parking costs incurred whilst travelling on Connected Together business. Claims should be made on the Volunteers Monthly Expenses Claim Form and must be supported by original receipts. Where a parking meter was used, and no receipt is available a note to that effect should be included with the claim
- Motorway, tunnel, and bridge toll charges will be reimbursed on production of receipts or tickets

#### 4.3 Local public transport expenses

- Local bus travel must be supported by original receipts (e.g. used tickets)

#### 4.4 Rail travel

- Rail travel wherever possible should be booked in advance to take advantage of the reduced fares

#### 4.5 Taxis

- Any volunteer who wishes to use a taxi to transport them to CTCIC meetings or events should first contact the volunteer or project lead, or CEO for approval of this expense prior to booking of a taxi. Once authorised the volunteer or project lead can book the taxi via the CTCIC approved taxi firm. In instances where an individual is authorised to book the taxi themselves reimbursement will be made on production of **an original receipt** from the taxi company

## 5. Subsistence

- When Advisory Board members or volunteers are away from their normal place of work on Connected Together business, they may claim reasonable subsistence to cover the cost of food and beverages within the rules and limits in travel and subsistence rates

### 5.1 Mileage and subsistence rates

Travel Expenses		
Type of vehicle	First 10,000 miles	Above 10,000 miles
Cars and vans	45p	25p
Motorcycles	24p	24p
Cycles	20p	20p

Subsistence	
Meal Type	Reimbursement allowed
Breakfast on day of travel if journey commences before 7am	Maximum of £8
Breakfast in conjunction with an overnight stay (where not included in tariff)	Maximum of £12
Lunch if your absence from Connected Together is continuous between 10am and 3pm	Maximum of £8
Dinner if journey cannot be completed before 7.30pm	Maximum of £12
Dinner in conjunction with an overnight stay	Maximum of £25

### 5.2 Non-reimbursable expenditure

The following items will not be reimbursed as part the travel and subsistence claim:

- subscriptions to professional bodies
- speeding, parking, wheel clamp fines
- unauthorised or excessive travel and subsistence costs
- any expenditure not supported by detailed, original receipts
- loss of earnings
- alcoholic drinks

### 5.3 This policy does not apply in the following circumstances:

- individuals attending open public meetings, launch events or other meetings which are open to everyone (e.g., public meetings, governing body meetings,

AGMs) or other meetings without specific invitations to assist in CTCIC/HWNW/HWR business

- individuals giving views through questionnaires or interviews (save for section 7)
- individuals receiving payment from other organisations for their participation in CTCIC work, e.g., members of voluntary or community organisations
- Travel or subsistence expenses already being paid by another organization

## **6. Equipment and consumables**

Board members and volunteers may claim reimbursement for stationery and printer ink used in CTCIC activities. Claims should be made on the Volunteers Monthly Expenses claim form and be supported by original receipts.

## **7. Carers' Support**

- If an individual needs additional support to enable them to attend meetings, such as accompanying costs, childcare or interpreters, this will need to be discussed and agreed in advance with the CEO or volunteer lead and reasonable expenses may also be covered (with relevant evidence provided e.g. receipts/invoices). An audit trail will need to be kept showing what expenses have been agreed in advance
- To enable carers who are volunteering for CTCIC to attend events, meetings, conferences, etc., or specific pieces of work that utilise their skills as experts by experience, expenses related to the caring role can be claimed, these would include care or sitting costs, reimbursement for travel costs or other related expenses

## **8. Reimbursing expenses for online events and meetings**

More and more meetings are now held virtually because of the Covid-19 pandemic. Where volunteers participate in virtual online meetings, which can be either internal HWNW/HWR meetings or external partner meetings, HWNW/HWR volunteers can claim £5 per meeting towards the costs of telephone calls, internet connection, printing ink, paper, and other sundries. Volunteers can claim this allowance via the expenses form in the usual manner itemising the meeting or event that they attended along with submitting a meeting report to the office if it is an external meeting.

## **9. Volunteering and benefits**

The Department for Work and Pensions recognises the value of volunteering for reasons of health, community benefit and as a way of developing skills and

experience.

- However, volunteers should be sure to tell their benefits advisor about their Volunteering
- In most cases benefits will not be affected by volunteering

It is recognised good practice to reimburse volunteers for their out-of-pocket expenses. If this is the only payment made to volunteers, and if receipts are kept as evidence, then expense payments should not affect benefit payment