

## **VOLUNTEER EXPENSES POLICY**

### **Introduction**

1. Healthwatch Kingston Upon Hull is committed to involving a diverse range of people in its work and recognises that volunteers should not lose out through incurring costs associated with their volunteering. To encourage local people to volunteer Healthwatch will repay out of pocket expenses.

### **Who Does This Policy Cover?**

2. This policy covers all Healthwatch ISAB members and volunteers who carry out pre-approved Healthwatch activities or attend pre-approved Healthwatch events.

### **What Expenses Will Be Paid?**

3. Only actual expenses incurred will be reimbursed and receipts and travel tickets must be submitted. Expenses eligible include travel and parking costs, subsistence and carers/childcare expenses incurred to fulfil pre-agreed Healthwatch activities.

### **Travel and Car Parking**

4. Volunteers are expected to use their discretion in determining the most appropriate mode of transport for travel on Healthwatch business taking into account the time spent on the journey, personal safety (particularly when travelling out of office hours), any equipment carried.
5. In the interest of the environment please use public transport or car share wherever possible. The carriage of passengers will be at the approved rate. Volunteers should use public transport on all appropriate occasions, unless it is clearly impractical. Rail fares should be at standard class fares. If it is volunteers must drive using the shortest possible route to their destination.

6. Volunteers are responsible for arranging suitable insurance cover for their vehicles and should consult with their insurance company to ensure that their policy covers voluntary driving for Healthwatch Kingston Upon Hull and contains a clause indemnifying Healthwatch Kingston Upon Hull against third party claims arising from the use of the vehicle on such voluntary work. Written confirmation of this must be submitted to the Healthwatch Delivery Manager before a volunteer can use their car for Healthwatch voluntary work (a standard letter and form is available from the Healthwatch Manager).
7. Parking, rail and bus fares should be claimed on an actual basis and all receipts must be attached to an approved expenses claim form. Taxi fares may be claimed where volunteers may find it difficult to use any other form of transport (i.e. do not own a car) and when meetings are held on an evening or at times when there is insufficient public transport to meet needs.
8. Payment of mileage expenses will be at the HMRC approved rates which will be kept under review (see Appendix 1 below).

### **Subsistence**

9. If as a result of an eligible Healthwatch event/meeting volunteers are prevented from taking a meal at home or at a place where they would normally take their meal, and as a result incur expenditure greater than normal, then they may claim for this meal up to the relevant subsistence allowance. The allowance will not be paid when a suitable meal is provided.
10. If you are working outside of normal working hours as a result of an eligible event/meeting, you may claim a subsistence allowance at HMRC approved rates which will be kept under review (see Appendix 1 below).
11. Payment of subsistence allowances is subject to the expenditure having actually been made and with receipts been attached to the expenses claim form. Subsistence allowances are the maximum that can be

claimed and volunteers should be considerate of budget constraints and act in good faith.

### **Childcare and Carers Expenses**

12. Volunteers with Healthwatch who have childcare or carer's responsibilities are also able to claim for reasonable out of pocket expenses in connection with these responsibilities. This will cover costs of the person providing cover for the volunteer for a Healthwatch event / meeting.
13. Choosing who should look after a child or a dependant is the responsibility of parents and carers. In line with protecting children and vulnerable adults, Healthwatch recommends that children or dependants are looked after by a registered and qualified person who can provide this cover. However in some cases parents/carers may choose to have their child/dependant looked after by a friend, family member or other adult who would normally be trusted to take over their responsibilities. In these cases it may be difficult for people to provide receipts for childcare/caring costs.
14. Volunteers wishing to claim such expenses should discuss this well in advance with the Healthwatch Delivery Manager. Parent and carers using the services of a registered person will usually have a set charge for their services which the volunteer will have to pay. This is the amount that will be reimbursed. Parents and carers using the services of a trusted adult will be paid at a locally approved rate.
15. Payment of expenses is subject to completing a childcare/carers expenses claim form (available on request from the Healthwatch office with receipts where possible attached).
16. Volunteers claiming childcare and carers expenses should be considerate of budget constraints and act in good faith.

### **Meetings and Events outside Hull**

17. Meetings and events outside the Hull area, to which a volunteer wishes to attend, and for which expenses from Healthwatch Kingston Upon Hull are requested, must be cleared by the Healthwatch Delivery Manager in advance giving at least one weeks' notice. Such requests will be discussed by the Healthwatch Delivery Manager who will agree if Healthwatch should be represented at such meetings/events and who will represent Healthwatch.
18. For such meetings volunteers should inform the Healthwatch Delivery Manager why attendance would benefit Healthwatch, and set out the proposed means of travel and any potential overnight accommodation costs. The Delivery Manager will then inform the Hull CVS/MNH Chief Officer if it needs an urgent decision. Failure to give at least one weeks' notice in making a request will mean the request will be refused.
19. Travel allowances for journeys outside of Hull will only be paid based on the cost of standard class rail fares and/or other appropriate public transport costs. Mileage allowances for such journeys will only be paid when the use of public transport is demonstrably impractical or when more than one person is travelling on the same journey and the shared use of a motor vehicle results in an overall economy.
20. Claims for the cost of overnight hotel accommodation will only be paid if it would be demonstrably impractical for a volunteer to travel and return home the same day (e.g. if attending an event a considerable distance from home, or attending a conference over two days).
21. All bookings for travel and overnight accommodation will be made by the Healthwatch office with consideration to budget constraints. Any bookings by claimants will not be accepted.
22. Attendance at such events and payment of expenses is conditional on the volunteer producing a written report on the outcomes of the event to share with the Healthwatch Team.

### **Claiming Expenses**

23. Volunteers are responsible for submitting expense claim forms to the Healthwatch office. Claims must be made on a monthly basis.
24. Expense claims over three months will not normally be reimbursed, unless there are special reasons why a claim was submitted late, such as illness.

### **Procedure for Claiming Expenses**

25. All expenses must be listed on a volunteer expense claim form which must be authorised by the Healthwatch Delivery Manager. All receipts, bus tickets etc. must be attached to this. Copies of the claim forms are available from the Healthwatch office on request.
26. Approved expenses will either be paid straight away up in cash up to a limit of £10 or will be paid by BACs as soon as reasonably possible.

### **Benefits and Tax**

27. It is the responsibility of volunteers to declare receipt of any relevant repayment of out of pocket expenses to the benefits and/or tax authorities. The general rule for both the benefits and tax systems is that expenses that are 'wholly, exclusively and necessarily incurred in the course of the work' are not considered to be earnings and therefore should not affect benefit entitlement or tax liability. Any queries about this should be taken up with the Healthwatch Delivery Manager.

### **Monitoring and Review**

28. The Healthwatch Delivery Manager will monitor the Expenses Policy and budget regularly.

### **Breaches of Policy**

29. Any alleged breaches or abuse of this policy by a volunteer will be referred to the Chief Officer for action, which may include the volunteer being removed as a Healthwatch volunteer.

## **November 2021**

### **Appendix 1 Approved Expenses Rates**

#### **Mileage**

|              |   |
|--------------|---|
| Motor Cars   | 45p per mile (first 10,000 miles in the tax year)   |
| Motor Cars   | 25p per mile (mileage above 10,000 in the tax year) |
| Passengers   | 5p per mile per passenger                           |
| Motor cycles | 25p per mile  |
| Bicycles     | 20p per mile  |

#### **Subsistence**

Breakfast rate - £5.00 if the volunteer leaves home before 6am and buys a meal away from home.

One Meal Rate - £5.00 as long as the volunteer is away from home for at least 5 hours and has bought a meal.

Two Meal Rate - £10.00 as long as the volunteer is away from home for at least 10 hours and has bought a meal.

Late evening meal rate - £15.00 if the volunteer is away from home after 8pm and buys a meal away from home.

These allowances can be combined. For instance, the two meal and late evening meal allowance could both apply.

These rates are the maximum that can be claimed. It is good practice to only repay against actual expenditure.

**November 2021**