

Volunteer Travel and Expenses Policy

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| Date approved by HWWB Board | 07/03/16 |
| Author | Jo Karasinski |
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| Last revised | |
| Next revision due | 07/03/18 |
| <p>The policy on the HWWB website is the only policy that is updated. Please note that it is the individual HWWB staff, board member or volunteer to ensure that they are reading the most current version of this policy. This can be done by checking the version number shown above against the version number of the policy filed here: www.healthwatchwestberks.org.uk</p> <p><u>If required this policy can be supplied in different formats</u> <u>Tel: 01635 886 210 or email: contact@healthwatchwestberks.org.uk</u></p> | |

Responsibilities

- 1 HWWB Board**

Have overall responsibility for volunteers within HWWB
- 2 HWWB Chief Officer (CO)**

HWWB Board have delegated to the HWWB CO the responsibility for developing policies and procedures for volunteering at HWWB and to ensure these are implemented effectively.
- 3 HWWB Staff and volunteers**

All HWWB staff and volunteers are required to read and implement the policies and procedures.

Volunteer Travel and Expenses Policy

1. Introduction

In carrying out Healthwatch West Berkshire's (HWWB) 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 Healthwatch activity and recognise that no-one should lose out through incurring costs associated with their volunteering.

HWWB 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 HWWB'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 HWWB.

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 HWWB. The Chief Officer (CO) may refuse any claim that appears to be excessive.

The following travel costs may be reimbursed where the activity venue is the place where the volunteering will take place:

- Return trip from home (or place of work) to the activity venue on public transport e.g. bus, train where supported by receipts.
- Return trip from home (or place of work) to the activity venue in private car, motorcycle, other motorised vehicle or pedal cycle at the rates shown below.
- Reasonable parking costs for the duration of the activity where parking is not provided free of charge.

Type of Vehicle Rate per mile

Private Car up to 10,000 miles per year 45p

Private Car up to 100 miles per single trip 45p

Private Car over 100 miles per single trip Lowest of public transport cost or 45p

Motorcycle 24p

Pedal cycle 20p

- Where volunteers travelling in a private car also give a lift to another volunteer who would otherwise have been entitled to claim for travel reimbursement under the terms of this policy, then the person giving the lift may claim a passenger allowance.

The passenger allowance will be paid at a rate of 5p per mile for each passenger.

- Taxis will only be reimbursed in exceptional circumstances and with prior agreement from the project manager that a taxi is required due to medical reasons or because it is impractical to use an alternative form of transport. The manager should also consider whether a lift could be provided by a member of Healthwatch staff attending an event or activity. If a taxi is required then the manager may make arrangements for the taxi fare to be billed directly to Healthwatch West Berkshire.

- Where volunteers incur additional expense for their vehicle insurance premium directly as a result of their volunteering activity, approval should be sought in advance from their manager, for this extra cost to be reimbursed on an expenses claim form. This relates to the need for volunteers who use a car as part of their volunteering activity to have occasional business use endorsed on the policy, which some insurers will levy an additional premium. Clear receipted proof will be required of the additional charge.

If you have any special requirements, or are unsure whether you can make a claim this should be discussed with HWWB CO or nominated persons. It is requested that you discuss this before spending money.

3. Reimbursement of expenses

- claims for reimbursement should be made on a Monthly Expenses Claim Form request a printed copy from the HWWB staff.
- claims must always be supported by **original receipts** or other supporting documentation. Photocopies are not acceptable. Credit/Debit card vouchers, e.g. visa receipts, are not admissible as receipts. An **official detailed receipt** should be obtained when using this method of payment for personal expenses. All receipts should be attached to the claim for reimbursement
- 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 Chief Officer before the claim is submitted. Approval will only be given in exceptional circumstances.
- payment of travel expenses should conform to 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

4. Authorisation of claims

- completed forms will be first checked by the nominated HWWB staff member against the Volunteer Work Plan to ensure that all travel on Healthwatch West Berkshire business is justified and that all claims relating to that travel are in accordance with this policy
- once agreed by the Volunteer Co-ordinator/ HWWB staff member the claim will be passed to the HWWB CO for authorisation for payment and counter signature.
- each entry must contain sufficient detail for the Volunteer Co-ordinator/staff member and the CO to agree that the cost is a valid claim on Healthwatch 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 HWWB 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.

5. 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 Healthwatch West Berkshire

5.1 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 member's time

- board members and volunteers who use their private car on HWWB 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

5.2 Car parking

- HWWB will reimburse all expenses for car parking costs incurred whilst travelling on Healthwatch 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

5.3 Local public transport expenses

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

5.4 Rail travel

- rail travel wherever possible should be booked in advance to take advantage of the reduced fares of standard class travel, first class travel would not be considered a reasonable expense by HWWB

5.5 Taxis

- any board member or volunteer who wishes to use a taxi to transport them to HWWB meetings or events should first contact the Volunteer Co-ordinator/nominated staff member for approval of this expense prior to booking of a taxi. Once authorised the Volunteer Co-ordinator/nominated staff member may book the taxi via the HWWB 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

6. Subsistence

- when board members or volunteers are away from their normal place of work on Healthwatch business they may claim reasonable subsistence to cover the cost of food and beverages within the rules and limits in travel and subsistence rates

| Subsistence | |
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| Meal Type | Reimbursement allowed |
| Breakfast on day of travel if journey commences before 7am | Maximum of £7 |
| Breakfast in conjunction with an overnight stay (where not included in tariff) | Maximum of £10 |
| Lunch if your absence from Healthwatch is continuous between 10am and 3pm | Maximum of £8 |
| Dinner if journey cannot be completed before 7.30pm | Maximum of £14 |
| Dinner in conjunction with an overnight stay | Maximum of £18 |

6.1 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

7. Equipment and consumables

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

Equality Impact Assessment Form

Screening determines whether the policy has any relevance for equality, i.e. is there any impact on one or more of the protected characteristics as defined by the Equality Act 2010. These are:

- Age
- Disability
- Gender Reassignment
- Marriage and Civil Partnership
- Pregnancy and Maternity
- Race
- Religion or belief (including lack of belief)
- Sex
- Sexual Orientation

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| 1 Name of policy/procedure being assessed: | HWWB - Policies - Volunteers - Travel and Expenses |
| 2. Is this a new or existing policy/procedure? | New for HWWB Board Members & Volunteers |
| 3. What is the function of the policy/procedure? | To provide information and procedures to board members and volunteers in respect of claiming for reimbursement of travel and other approved expenses |
| 4. What is it trying to achieve and why? | To ensure financial governance for public funds used to reimburse claims. To ensure board members and volunteers know what they may claim and how claim their expenses |
| 5. Who is intended to benefit and how? | HWWB via demonstration of robust financial governance Board Members and volunteers - consistent treatment, clarity of how and what to claim in relation to travel and expenses |
| 6. Is there any potential for differential impact (negative or positive) on any of the protected characteristics? | No |
| 7. Is there any possibility of discriminating unlawfully, directly or indirectly, against people from any protected characteristic? | No |
| 8. Could there be an effect on relations between certain groups? | No |
| 9. Does the policy explicitly involve or focus on a particular equalities group i.e. because they have particular needs? | No |
| Signed - Signature: Jo Karasinski Name: JO KARASINSKI Position: Development Officer Date: 10/12/15 | |

