

Volunteer Expenses Procedure

Procedure title	
Version	2
Approved by	
Date approved	
Procedure owner	Director of Corporate Services
Procedure manager	Head of Volunteer Transformation
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Related policies	
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Our vision

We can all live a happy, connected and purposeful later life

Our mission

To ensure that as we grow older, we all have the opportunity to live well with dignity, choice and purpose

Our values

Purpose-driven – Compassionate – Expert – Collaborative -
Accountable - Inclusive

1. Introduction

We are grateful for the generous way volunteers give time to Independent Age and we are committed to ensuring that you are not out of pocket whilst volunteering.

Independent Age wants to ensure all volunteers are treated fairly and consistently and that expenses are paid promptly. This procedure sets out to explain what expenses volunteers can claim and how they can be claimed. Also included as an appendix is a copy of the Volunteer Expenses Claim Form.

2. Important note

All expenses should be agreed in advance with your local Independent Age contact. Expenses claims need to be supported by receipts for all items you are claiming for –except for mileage costs.

3. What can I claim for?

We feel that it is important that you claim expenses for all activities related to your role. These might include travelling, refreshments, telephone calls and postage costs, or other costs. Remember that you can only claim expenses for costs incurred as part of your volunteering role. For example, if you were meeting an older person as a friend outside of your volunteering role then you could not claim expenses for that meeting.

Travel

We cover the costs for travel to and from your home to the place of volunteering. As far as possible, we will always try to find a nearby location for your volunteering so that you don't have to travel very far. We also cover the costs for any travel that you undertake as part of your volunteering. For example, taking someone to an appointment or an agreed activity.

You should consult and inform your insurance company before using your car to get to your place of volunteering or for any volunteering activity. Usually there is no additional insurance cost for this sort of driving. For further information on driving in your volunteer role, please see our guide "**Driving and Carrying Passengers**" which you can download [here](#) from the Volunteer Resource section on our website, or your Independent Age contact will be able to give you a copy.

Unless previously agreed by your local Independent Age contact, when using your own means of transport, you can claim up to a maximum of:

- 40 miles per day for travel associated with supporting older person

- 120 miles per day for travel associated with other parts of your volunteering, e.g. training, get togethers, focus groups and similar events.

In line with HMRC guidance, you have to include the postcodes “from and to” when claiming your expenses and the total and accumulated mileage you are claiming every tax year. The current mileage rates are all shown on the table:

From tax year 2011 to 2012 onwards	First 10,000 miles in the tax year	Each mile over 10,000 in the tax year
Cars and vans	45p	25p
Motor cycles	24p	24p
Bicycles	20p	20p

We will pay for parking fees, so please remember to get a receipt for them. We can't pay for speeding and parking fines, or other penalty charges.

When travelling by public transport, please use standard fares and try to book in advance to take advantage of any discounts. We can only pay for the actual costs of the journey with a valid ticket or receipt.

Other forms of travel need to be agreed with your Independent Age contact.

Refreshments

All refreshments expenses should be discussed and agreed in advance with your local Independent Age contact.

When you volunteer for more than 4 hours in a day, including waiting time between appointments, we will reimburse refreshments up to £7 per day. We do not reimburse costs for alcohol.

When your role requires it, we will reimburse refreshments costs incurred up to the total value of £7 per day.

Please note that you are not expected to pay any refreshment costs for the person you are supporting.

Telephone costs

We want to reimburse telephone calls where possible, but we can only do so if you can evidence the actual cost of the calls, e.g. highlighting your calls on your itemised mobile/ landline calls statement.

Unfortunately, if you are on a "calls inclusive package", we can't pay a fixed rate per call due to HMRC regulations.

Other expenses

There might be times when you incur costs while you are volunteering with Independent Age, such as postage and stationery or a discreet piece of equipment/software you may need to complete a task. We will cover those costs, but they need to be agreed in advance with your local Independent Age contact and ensure you provide a receipt.

4. How can I claim for my expenses?

We want to make claiming expenses as easy as possible. However, it is important that all the moneys are accounted for to our funders, HMRC, volunteer budget and internal and external audit purposes.

You will need to complete the Volunteer Expenses Claim form (see Appendix), listing all expenses under the relevant reason. You can find the Volunteer Expense form on the Volunteer Resource Hub [here](#)

Your expenses claim must be supported by VAT or simple itemised receipts except for mileage (see below). The receipts must be originals. The form can either be signed with a handwritten signature or if you are submitting electronically, you can type your signature into the signature box at the bottom of the form. Remember to attach either paper copies or photographs of the receipts (if submitting electronically) before sending to your Independent Age contact for approval.

Unless there are exceptional circumstances, all expenses including mileage, should be submitted monthly or at least every three months.

Email

All expenses can be claimed by email as long as you attach a legible scan or photograph of the original receipts. The expenses claim form must be signed (type your name into the signature box) before emailing it to your Independent Age contact for them to countersign. In your email you should include the following text: "***I confirm that this claim for £xxx.xx represents my expenses incurred on behalf of Independent Age***"

Post

If you are completing a paper copy of the expense form, you should send your expenses to your local Independent Age contact

We cannot guarantee to reimburse expenses claims over three months old.

We can post all these forms to you, just ask your local Independent Age contact or the Volunteering team on 020 7605 4255 or volunteering@independentage.org for copies. We can also provide freepost envelopes.

5. How we pay your expenses

We collect your bank account details when you first join us, so we can pay you via a bank transfer. There is a BACS form that we will ask you to fill in if it is your first time claiming expenses or if your details change. This form can be found on the volunteer resources webpage <https://www.independentage.org/get-involved/volunteering/volunteer-resources> or alternatively your Independent Age contact can give you a copy. When you have completed this, please email the form to the finance team at: Finance.Email@independentage.org or call them on 020 7605 4241.

Payment will normally be made within 21 days of receiving the forms. However, depending on when the finance team receive your claim form, there may be a delay for the payment to reach you.

If you have any questions about claiming your expenses, please talk to your Independent Age contact or the Volunteering team on 020 7605 4255 or email at volunteering@independentage.org.

6. How to complete the Volunteer Expenses Claim form

Mileage

The top half of the volunteer form is for mileage to and from your place of volunteering if applicable. **Remember to include the first three digits of the postcodes "from and to"** to be compliant with HMRC and auditing purposes. We are required to have an **identifiable trace of the total mileage** you are claiming every tax year, so please keep a copy for your records so you can keep track of your cumulative mileage when filling in the boxes:

- Total miles claimed since the 1st of April (year)
- New total after this claim

For handwritten claims, you will need to multiply the total mileage by the appropriate rate from the HMRC table on the policy to give you the figure for the total claim.

Other Expenses

This section covers expenses such as bus/train tickets, telephone calls, shop/café receipts, postage and printing. All expenses need to be previously discussed and agreed with your local Independent Age contact.

Remember to number each receipt and include some supporting narrative for each line so we know what you are claiming for. Please also remember to include all original receipts.

Data Protection

In order to protect everyone's privacy, please do not put any identifiable information in the narrative as the explanation for expenses. For the same reason you are not required to put the full postcode of your destination.

Authorisation

Finally, by signing the claim form, you confirm that what you have sent through is correct to the best of your knowledge.

Your Independent Age contact will check the form and agree the payment before sending it to the Finance team.

7. Feedback

If you have any feedback or have identified an issue or inaccuracy with this procedure, please contact the Volunteering team on 020 7605 4255 or volunteering@independentage.org

Appendix

VOLUNTEERS EXPENSES CLAIM FORM

Name:

Address:

Please remember to write the description in each category and provide receipts, except for mileage. All completed and signed expenses form, receipts and diary sheets should be sent to your local Independent Age contact monthly.

Mileage Expenses					
Date of Journey	Reasons for journey	Postcodes where/ to	Miles travelled	Cost per mile: car: 45p motorbike: 24p bike: 20p	Total
<i>eg 10/08/18</i>	<i>Car travel face to face visit roundtrip</i>	<i>Travel from E14 to W14</i>	<i>11</i>	<i>0.45</i>	<i>4.95</i>
Total miles claimed since 1 April (year)				Total	£0.00
				Total	
New total after this claim				Total	£0.00
				Total	

Continue on the other side for other expenses and signature

All other expenses					
Date and number of expenses	Reasons for expenses	Travel (public transport)	Refreshments	Other expenses, please specify	Total
<i>eg.</i> 11/08/18 (1)	<i>Face to face visit to</i> <i>023456</i>	<i>£2.60</i>			
				Total	0

In making this claim I certify that the insurance policy in respect of my motor vehicle provides for third party insurance while the vehicle is used on Independent Age business, including cover against risk to injury to, or death of, passengers and damage to property and the policy was in force at the times when listed journeys were made.

Total for this Claim:	£0.00
Signed:	Dated:

For completion by local Independent Age contact:

Authorised by:	Department Code:
Signed:	Dated:

