

Volunteer expenses policy

Document information

Approved by: Audit and Risk Committee	Date: 21 April 2023
Frequency of review: Annual	Next review date: February 2024
ELT Owner: Director of Finance and Planning	Policy lead: Associate Director of Finance

Volunteer Expenses Policy

1. Purpose and scope

This policy applies to all Parkinson's UK volunteers (including trustees and independent board committee members) and sets out levels of reimbursement for the following expenses incurred whilst volunteering:

- Travel
- Subsistence
- Accommodation
- Childcare, carer and professional support and administration
- Family volunteering

It also covers:

- How to claim expenses
- How we handle your information
- Have any questions?

2. Policy statement

As a Parkinson's UK volunteer, we want to make sure you aren't out of pocket, and therefore we'll reimburse all reasonable expenses incurred while carrying out volunteering activities.

We all have a responsibility to keep our expenses to reasonable levels and use donations in the most effective ways possible. We have set levels of reimbursement, in line with UK standards of good practice and our staff expenses policy, both which are described below.

2a. Travel

All travel costs incurred as part of your volunteer role will be reimbursed. Please talk to your staff contact before travelling if a journey will be more than 100 miles in total.

Public transport

Standard class public transport must be used when travelling on behalf of Parkinson's UK. Please book tickets as far in advance as possible, making use of any concessions, special offers or discounts where you can. This includes bus, coach, train, tram, ferry and air travel.

If you are using a pre-pay scheme such as Oyster Card in London, please submit a printout of the individual journeys made, highlighting which journeys you are claiming for. We are unable to reimburse Oyster Card 'top-ups' as expenses claimed must be for the actual cost of travel.

We are unable to reimburse the purchase of any form of season ticket or railcard (such as young persons, senior or disability railcards). That's because these can be used for other journeys so are classed as a taxable benefit by HMRC.

If you would like to travel first class, we would ask you to pay the additional costs.

Taxis

We want to ensure the charity's money is used as effectively as possible, so we ask all our staff, volunteers and supporters to use taxis only when necessary. Taxis should only be used where public transport is not practical or where there is a time constraint, an emergency or for safety reasons. A receipt for reimbursement will be required. The charity has an account set up with Addison Lee which should be used for taxis from the UK office in London.

Driving private vehicles

When using your own vehicle, you will be reimbursed in accordance with the following set mileage rates:

<u>The first 10,000 miles in the tax year</u>	<u>Over 10,000 miles in the tax year</u>
Car 45p per mile Motorcycle 24p per mile Bicycle 20p per mile	Car 25p per mile Motorcycle 24p per mile Bicycle 20p per mile

The above rates are set by HMRC and are current at time of writing. These rates are reviewed annually by HMRC and any changes are at the discretion of Parkinson's UK. Mileage rates are clearly printed on the volunteer expenses claim form and we will ensure this is kept up to date to reflect any changes.

Parking

Please provide receipts when claiming parking costs.

Toll and congestion charges

Where relevant, you will be reimbursed for toll and congestion charges. Please provide receipts for these costs if possible.

Penalties and fines

We cannot reimburse parking or congestion fines, speeding tickets or other driving offences.

2b. Subsistence

Parkinson's UK will reimburse your subsistence up to the following rates detailed below. Please make sure you submit receipts with your claims.

Breakfast

If you stay overnight as part of your volunteering, and breakfast is not included with the accommodation, you can claim up to a maximum of £15.

Lunch

When volunteering for five hours or more or over lunchtime, and lunch is not provided, you can claim the cost of lunch up to the value of £15.

Snacks

We understand that if you volunteer for a particularly long day, or during the evening, you may need additional food and drink. In these circumstances you can claim additional food and soft drinks up to the value of £10.

Evening meal

If you stay overnight as part of your volunteering, the cost of an evening meal can be claimed up to a maximum of £25.

Alcoholic drinks

Please note that alcohol is not an allowable expense.

2c. Accommodation

Occasionally you may need to stay overnight to attend training, a meeting or an event related to your volunteer role.

The policy limit guidelines are:

Central London: up to £200 including VAT (including B&B)

Other major UK cities: up to £120 including VAT (including B&B)

Out of cities: up to £100 including VAT (including B&B)

It is understood that there may be occurrences where finding suitable accommodation within these limits is unrealistic due to hotel demand etc and in these instances confirm with your staff contact before booking accommodation above these limits

Rooms must be booked on a single occupancy basis. If you book a double occupancy room, we would ask you to pay the additional amount. However, if you require your carer to travel with you, the charity will cover the full cost.

If you require accommodation for training, meetings or events at the UK office, please talk to your staff contact first as it may be possible to book and pay for a hotel room centrally using the charity's travel management company (Click Travel).

2d. Childcare, carer, professional support and administration

Childcare costs

We are unable to reimburse the costs of care for children during regular, agreed volunteering hours. However, you will be reimbursed for expenses incurred when you are asked to attend training or events outside of your normal volunteering hours. We will reimburse the actual costs of care provided by a registered childminder to a maximum of £12 per hour outside of the M25 and £13 per hour inside of the M25. Please talk to your staff contact or local group before booking childcare.

Informal carer costs

An informal carer may be a relative, friend or partner who provides unpaid support to a person who, due to illness, disability, a mental health problem or an addiction, cannot manage without their support. When a volunteer would be unable to

participate in training, a meeting or event without their support, the costs of subsistence, travel and accommodation for the carer will be covered. The maximum amounts that can be claimed are set out in the subsistence and accommodation section above.

Professional carer costs

Parkinson's UK is unable to meet the costs of professional carers standing in during your volunteering hours. However, you can claim for costs incurred when a training, meeting or event falls outside the hours you would have normally volunteered. In these instances, we will meet the costs of subsistence and travel for professional carers, in line with the agreed limits set out in this policy. Where necessary, we will meet the costs of a carer's fee up to a maximum of £25 an hour, when agreed in advance with your staff contact or local group.

Professional support

We recognise that some volunteers may have additional needs and may require professional support to enable them to volunteer. In these instances, you will be reimbursed for the costs incurred. The type of support required will depend on your individual needs but may include:

- assistance during travel
- a sign language interpreter
- translator
- a hearing loop

Please discuss your additional needs with your staff contact or local group before purchasing or arranging support.

Administration costs

These may include:

- cost of phone calls
- postage
- stationery
- printing materials

When claiming for stationery or postage, please provide the relevant receipts. When claiming for phone calls, please highlight the relevant calls on the bill where possible. We understand the potential challenges of getting an itemised bill so you can claim call charges up to £5 where an itemised bill isn't available. Under certain circumstances, you may also be reimbursed for the costs of portable equipment, such as lockable case boxes or paper shredders. Please talk to your staff contact for more information.

We are unable to reimburse via expenses the costs of furniture, utilities including gas, electricity, broadband/phone line installation and rental costs or computer equipment including software. Where such services or equipment are required for delivering or supporting volunteer activities, this will be purchased via [local group funds](#) or by the charity centrally: please speak to your staff contact about what's applicable to your particular volunteer role.

2e. Family volunteering

The out-of-pocket expenses of children volunteering with their parents, guardians or carers, as part of our family volunteering initiative, may be claimed for in line with this policy.

2f. How to claim expenses

Depending on the volunteer role you are undertaking, you can claim your expenses back through either:

- your local group's funds
- your staff contact and the Finance Department at the Parkinson's UK office

For all local group roles, the first option should be used. For all other volunteer roles, including Trustees, please use the second option. If you undertake two separate volunteering roles, expenses relating to the two roles must be claimed separately through the appropriate channels.

Whatever process is being used to claim expenses, a [volunteer expense claim form](#) must be used, except under occasional circumstances. This form can be found on the Parkinson's UK website and on our volunteer site, Assemble, at any time. Detailed proof of purchase must always be provided. The Appendix **Volunteer Expenses FAQs** contains more information on how to claim expenses.

The Parkinson's UK Finance team aims to process all volunteer expense claims within three weeks of the date they receive the completed form. If information is incorrect or missing, a member of the team will get in touch to resolve the issue. Any forms submitted with incomplete information could result in a delay to payment. Claims made through a local group may take longer to be processed depending on how regularly your group meets.

We encourage you to claim back expenses incurred while volunteering for Parkinson's UK. However, we understand that not everyone will wish to do this. If this is the case, we would still encourage you to make a claim but to donate it back to the charity. We recognise this may be more time-consuming, but it gives volunteers who are able to claim Gift Aid the opportunity to help raise extra funds for the charity and enables us to assess the true costs of involving volunteers in our work. Details on how to do this can be found in the Appendix **Volunteer Expenses FAQs**.

2g. How we handle your information

By making a volunteer expenses claim, you will be asked to supply certain details, including address, contact information and bank details. We collect this information only to process your expenses claim. We keep details on record within our central finance database for statutory accounting reasons and to be able to expedite any subsequent claims in line with current data protection regulations. No details from the finance database are ever used for any purpose other than to make payment and are never passed to any third party.

2h. Have any questions?

If you have questions about expenses that are not covered in this policy, look at the Appendix **Volunteer Expenses FAQs**. If your question isn't answered there, please get in touch with your staff contact or the Parkinson's UK Volunteering team on **020 7963 9328** or volunteering@parkinsons.org.uk.

3. Training and support

We have also developed **Volunteer Expenses FAQs** to answer any questions you may have about claiming your expenses. And, if you have any questions that aren't answered here, don't forget you can talk to your staff contact.

4. Appendices

Appendix 1 - Volunteer Expenses FAQs

Appendix 2 - Record of review

Appendix 1: Volunteer Expenses FAQs

At Parkinson's UK we are very grateful for the time you give to the charity and believe it's important that you're not left out of pocket for doing so. This FAQs sheet answers the most commonly asked questions about Parkinson's UK volunteer expenses so please read on to find out more.

1. What are volunteer expenses?

A volunteer expense is an expense that you incur when giving your time to Parkinson's UK, such as lunch, travel or car parking. Parkinson's UK reimburses reasonable out-of-pocket expenses as outlined in the **Volunteer Expenses policy**.

2. What if I don't want/need to claim my expenses?

We strongly recommend that volunteers claim any expenses incurred whilst volunteering with us so that you are not left out of pocket. However, we understand that not all volunteers wish to claim their expenses. If this is the case, you can make a claim and donate the amount back to Parkinson's UK. If you are a UK taxpayer, and your donation is Gift Aided, this can raise further funds for the charity (an extra 25p per £1 donated). You'll need to complete a [Gift Aid Declaration Form](#) and send this in along with your donation to Parkinson's UK or in the case of local group volunteers, your local group.

3. What can I claim for?

Details of what we reimburse are outlined in the **Volunteer expenses policy**. Some items, such as professional support, need to be agreed in advance with your staff contact or local group.

4. What do you mean by an actual expense?

This means that we reimburse only the exact amount you have spent rather than using a flat amount to cover your volunteer expenses per day. If you receive more than the actual amount that you were out of pocket in the first place, then it could be interpreted by HM Revenue and Customs that you are making a profit. This can affect any benefit entitlement you may have, or imply that you are employed and should therefore be taxed.

5. What do I need to make a claim?

To make a claim you will need the following things:

- full detailed proof of purchase e.g. receipts or an itemised bill highlighting the items you are claiming for
- a [volunteer expenses form](#). This can be found on the Parkinson's UK website, and on our volunteer site, Assemble. Please speak to your staff contact if you're not sure how to access this.
- your bank details - if you claim through Parkinson's UK Office we can pay your expenses directly into your bank account, if you provide details on the form.

6. How will you handle this personal information?

By making a volunteer expenses claim, you will be asked to supply certain details, including address and contact information and bank details. We collect this information in order to process your expenses claim only. We keep details on record within our central finance database for statutory accounting reasons and to be able to expedite any subsequent claims in line with current data protection regulations. No details from the

finance database are ever used for any purpose other than to make payment and are never passed to any third party.

7. What is the process for claiming expenses through my staff contact?

To claim expenses back for a volunteer role not linked to a local group you will need to complete a [volunteer expenses form](#) and attach or scan and insert all receipts to the form. This should then be given, posted or emailed to your staff contact.

8. What is the process for claiming expenses through my local group?

To claim back expenses incurred whilst volunteering for your local group you should complete a [volunteer expenses form](#), and attach or scan and insert all receipts to the form. This should then be given or sent to the designated person within your group who processes expenses, usually the Treasurer or Support Group Finance contact.

For expenses under £10 a volunteer expenses form is not necessary and volunteers can claim back from their local group by providing detailed proof of purchase as detailed in question 12, below. Treasurers or Support Group Finance contacts must keep records of all reimbursed claims as outlined in the Treasurers' guide.

If you are told you cannot claim expenses by your group but believe you should be able to claim, then please contact the Local Networks team on localnetworks@parkinsons.org.uk.

9. I volunteer for my local group and for other roles within the charity, how do I claim my expenses?

You will need to complete a separate expense form for each volunteer role that you undertake. This is because they need to be approved and processed in different ways. Your local group is responsible for approving expenses incurred as part of any group activity, and each of your other roles within the charity will have a staff contact responsible for approving expenses incurred as part of those roles.

10. What if I didn't get a receipt for something I have purchased?

Wherever possible you should obtain a detailed receipt for items purchased. However, we understand that this may not always be possible - for example when claiming for items such as road toll charges. In these cases, you should clearly state on the expenses form that no receipt was available.

11. What can I do if I've lost a receipt?

We understand that sometimes receipts can be mislaid, so for expenses claimed through the Parkinson's UK office, your staff contact will complete a form and submit it to the Finance team along with your expenses form, detailing what has happened, so that we can reimburse you.

If you're claiming through your local group, please talk to your Treasurer or Support Group Finance contact for their guidance.

12. How long will it take to process my claim?

We don't want to leave you out of pocket, so when you claim through the Parkinson's UK Office, we aim to process all volunteer expense claims within three weeks from the date the form was submitted. If information is incorrect or missing the Finance team will make

contact with you as quickly as possible to resolve the issue. If you are claiming expenses back through your local group this process may take longer depending on how regularly your group meets.

13. How will the money be reimbursed to me?

We know people prefer to receive their expenses in different ways. That's why we offer two different options (for claims processed through the UK Office):

- **BACS** - This is a transfer of money directly into your bank account. We prefer to reimburse your expenses directly into your bank account as this is quicker for you and saves the charity money. The first time you claim expenses by BACS you will also need to complete the bank details section on the volunteer expense claim form.
- **Cheque** - We can issue a cheque for the amount which is sent to your home address, which you would need to pay into the bank yourself.

Volunteer expenses claimed through local groups will usually be reimbursed by cheque but occasionally with petty cash. For amounts under £10 per month, like milk for refreshments at a meeting, you may be reimbursed if you provide proof of purchase with the following attached:

- your printed name and signature
- the first line of your address
- a few words explaining the reason for the spend.

You'll be asked to sign a receipt to confirm that you have received the cash or cheque. These receipts will then be kept in the local group's financial records.

14. What should I do if I don't receive reimbursement within three weeks?

If you have not received your expenses after three weeks of submitting a claim through your staff contact, you should contact them, so that they can find out why there is a delay.

Claiming expenses through a local group may take longer than three weeks as groups don't always meet regularly. However if you have any queries about a claim you have submitted please contact your Treasurer or Support Group Finance contact.

15. I've purchased an item on behalf of my local group, can I include this in my expenses?

Yes, items of expenditure related to the delivery of group activities which have been agreed in advance by the group/committee can be claimed back through group funds. More information on what group funds can be spent on can be found in the [local group Directory](#).

16. I am the main carer for a person with Parkinson's, can I make a claim for a professional carer to stand in during my regular volunteering hours?

No, unfortunately we are not able to cover the costs for carers, except where a training, meeting or event falls outside of your regular volunteering hours. As a charity we must be mindful of costs and we expect volunteers to be able to commit to the regular volunteering hours of the role as outlined in the volunteer role description.

17. I am currently in receipt of benefits, can I claim expenses?

Volunteers are able to claim benefits and expenses whilst volunteering with Parkinson's UK.

It's important you tell your benefits advisor that you are volunteering and that you will be having your actual, out-of-pocket expenses reimbursed. You may need to provide proof of expenses, including photocopies of the original receipts. If your benefits advisor asks you to provide a letter confirming your volunteering status, please contact the Volunteering team who will be able to provide you with one. For more information on volunteering whilst claiming state benefits please contact your benefits advisor or visit www.direct.gov.uk.

18. Who do I contact if I have a question about expenses?

If you have any queries or questions about expenses that are not answered on this sheet, please talk to your staff contact.

Appendix 2: Record of review

Date of approval	Summary of changes
21 April 2023	Rates amended in line with employees' policy. References to trustees and independent committee members included for completeness.