



The Friends of Chain Bridge Forge

Expenses Policy and Procedure

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Volunteer Expenses

As a Chain Bridge Forge volunteer, you are entitled to claim reasonable, actual, out of pocket expenses incurred whilst volunteering. In line with national standards of good practice in supporting volunteers we are committed to ensuring that no volunteer is out of pocket because of expenses incurred when volunteering for the Forge.

Summary

volunteer expenses procedures are described below under the following headings:

1. Who is a Chain Bridge Forge volunteer?
2. Before making an expense claim
3. Travel
4. Subsistence and Overnight Accommodation
5. Childcare
6. Administration
7. How expenses are claimed and reimbursements made
8. Reviewing this document

1. Who is a Chain Bridge Forge volunteer?

A volunteer is someone who undertakes activities that involve spending unpaid time using their skills, knowledge and experience to deliver or enable the work of Chain Bridge Forge. We will reimburse all reasonable volunteer expenses incurred through carrying out volunteer activities that are in line with our organisational remit subject to budget availability.

2. Before making an expense claim

Before making an expenses claim, volunteers must check that:

- the expenses they are making a claim for were a necessary expense incurred as a result of undertaking their volunteer role
- the expenses are reasonable and were made using the most cost effective method available, considering personal safety and wellbeing

- prior approval by a Director has been sought in advance for any expenses requiring this, such as taxi journeys and overnight accommodation
- all items of expenditure being claimed for occurred within the last 30 days

3. Travel

The Forge will reimburse volunteers for travel to and from their regular place of volunteering up to a maximum of 50 miles as well as any travel undertaken as part of their volunteer role including travel to different locations, meetings, trainings and events. They may also reimburse volunteers for travel to the place of regular volunteering if there is a case of hardship and or by so doing would adversely affect the Forge ability to conduct its operation.

Public Transport

Standard class public transport should be used when travelling on behalf of the Forge. Volunteers should book tickets as far in advance as possible, making use of any concessions, special offers or discounts. This includes bus, coach, train, tram, ferry and where appropriate, air travel. Tickets purchased must be for journeys made on behalf of the Forge only, if you are using a pre-pay scheme such as Oystercard, a print-out of the individual journeys made should be submitted, highlighting which journeys are being claimed for. Also, unfortunately we are unable to reimburse the purchase of any form of season ticket or railcard (such as young persons, senior or disability railcards) as these can be used for other journeys so are classed as a taxable benefit by HMRC.

Any volunteers wishing to travel by first class can pay the supplementary amounts themselves if they are happy to, but this will not be reimbursed.

Taxis

Taxis should only be used when considered essential, and where public transport is not practical, accessible, safe, or where there is an emergency. When planning to use a taxi, we advise volunteers to provide a quote or estimation to their named contact or to their Local Group in advance for approval.

Driving Private Vehicles

If public transport is impractical or more expensive than the cost of using a private vehicle, we will reimburse the cost of travel at the following set mileage rates:

The first 10,000 miles in the tax year

- Car 32p per mile
- Motorcycle 24p per mile

- Bicycle 20p per mile

Over 10,000 miles in the tax year

- Car 25p per mile
- Motorcycle 24p per mile
- Bicycle 20p per mile

The above rates are set by HMRC and are effective as of 6 April 2011. Volunteers and staff should be aware that these rates are reviewed annually by HMRC and any changes are at the discretion of Chain Bridge Forge Directors. The current rates will be clearly printed on the volunteer expenses claim form and The Forge will ensure this is kept up-to-date to reflect any changes to the mileage rates.

Parking costs, toll and congestion charges can also be claimed for where necessary; however, we do not reimburse parking fines or speeding tickets under any circumstances.

Insurance

Volunteers often aren't aware that using their personal vehicles for volunteering isn't automatically covered by their car insurance. Whilst some insurance companies will count volunteering within the "domestic, social and pleasure" category, others require it to be classified under business miles.

"Anyone considering using their vehicle in connection with volunteer work should check the position with their motor insurer," "Whether or not the insurer will charge an extra premium, impose any additional terms and conditions, such as a higher policy excess, or require cover to be extended to business use will depend on the exact nature of the activities being undertaken.

"Some insurers may be willing to continue cover without any change, providing that it's not being done in connection with a business, and that the policyholder does not make any profit, although receiving money for petrol used is OK."

Driving directly between home and a volunteer project wouldn't normally be affected by the rules on insurance. However, as Malcolm says: "The golden rule is to provide your motor insurer with full details for them to assess."

4. Subsistence & Overnight Accommodation

Food & Drink

When volunteering for a full day (over 5 hours) and lunch is not provided, we will reimburse the cost of lunch up to the value of £10. We also understand that if someone volunteers for a particularly long day or during the evening they may need additional subsistence, in such circumstances the cost of additional subsistence up to the value of £10 may be provided. If staying overnight as part of your volunteering, dinner can be claimed up to a maximum of £20 and breakfast, where not included with accommodation can be claimed up to a maximum of £5. **Under no circumstances are we able to reimburse the cost of alcoholic drinks for volunteers.**

Overnight Accommodation

Very occasionally volunteers may need to stay overnight in order to attend training, a meeting or an event related to their volunteer role and prior permission must be granted by the Directors. If staying inside the M25 up to £140 per night may be reimbursed, outside the M25 £90 per night may be reimbursed. Rooms must be booked on a single occupancy basis, any volunteers wishing to book a double occupancy room can pay the supplementary amounts themselves if they are happy to, but this will not be reimbursed. Discount booking services will be used.

5. Childcare

Childcare Costs

We are unable to reimburse the costs of care for children during regular, agreed volunteering hours. However, occasionally volunteers may be expected to attend training or events outside of their normal volunteering hours. In this instance, the actual costs of care provided by a registered child minder will be considered for reimbursement up to a maximum of £5 per hour where agreed by a Director in advance.

6. Administration Costs

There may be times when volunteers incur administration costs undertaking their role, for example, when making phone calls, printing materials or sending letters on behalf of Chain Bridge Forge . Standard postage should be used. We can reimburse the costs of phone calls, photocopying, stationery and postage when supported by receipts or an itemised bill. We are unable to reimburse the costs of furniture, utilities including gas, electricity, broadband/phone line installation and rental costs or computer equipment (except when computer equipment is purchased with group funds solely for the purpose of delivering Forge activities).

7. How expenses are claimed and reimbursements made

Depending on the role the volunteer is undertaking, expenses will either be claimed back:

- a) through the Forge cash box
- b) through a Director

To claim expenses a duplicate book must be used and receipts provided as proof of purchase. Information to be recorded is as follows:

- Date
- Name
- Description of Expense
- Amount - Note identify VAT contribution
- Signature of re-imbursement

In order to avoid volunteers being out-of-pocket for long periods of time, we encourage volunteers to make regular claims and are committed to processing all volunteer expense claims within four weeks from the date the form was submitted, however volunteers can usually expect to receive reimbursement in around two weeks. If information is incorrect or missing we will strive to make contact with the volunteer as quickly as possible to resolve the issue. We strongly recommend that volunteers do claim any expenses incurred whilst volunteering for the Forge. However, we understand that not all volunteers will wish to claim their expenses. If this is the case, we would still encourage volunteers to make a claim, but to donate it back to the charity. Whilst this may seem onerous, it is important that we understand the true costs of involving volunteers in our work and it also gives any volunteers who are able to claim gift aid the opportunity to help to raise extra funds for the charity.

8. Reviewing this document

This document will be reviewed annually to ensure information is kept up to date. This document will be an Appendix to the Financial regulations