

## Travel and Expenses Policy

### 1. Introduction

As part of its commitment to ensuring equity of access to volunteering opportunities, HWS is committed to paying pre-agreed out of pocket expenses to volunteers, that are incurred solely in undertaking the volunteering role.

The aim of this policy is to define for Healthwatch Sutton directors and volunteers how sustenance and travel expenses can be claimed.

Those eligible to claim sustenance and travel expenses under this policy are members of the HWS Board, authorised volunteers and any of the wider members authorised by the staff team and/or directors to carry out activity on behalf of HWS.

HWS will reimburse the actual cost of allowable, business expenses incurred wholly, exclusively and necessarily in the performance of the duties of a HWS director or volunteer.

This policy aims to ensure that HWS funds are used effectively to achieve Healthwatch Sutton's aims and objectives.

When incurring business expenses, volunteers are expected to:

- Minimise costs without impairing the efficiency of HWS
- Avoid unnecessary costs

In general, reimbursement of allowable business expenses will only be made on the production of receipts or invoices, or if agreed prior to expenses being claimed by the Chief Executive.

### 2. Authorisation

Claims for travel and other expenses must be authorised by the Chief Executive.

Claims will only be authorised where the expense was clearly incurred in the course of HWS work. If you are in any doubt, please ensure you receive authorisation first as you may not be reimbursed.

Pre-approved incidental expenses may be received where solely relevant to the business of HWS.

All claims should be made using the correct form and, with the exception of mileage allowance, should have bills, receipts or a signed voucher to support them. Please attach these securely to the claim and, if there are several, please number them.

There may be occasions when the Chief Executive may require further information in support of a claim. This will be to ensure HWS funds are used effectively.

### 3. Payment

HWS will reimburse claims usually within two weeks of the date received, by cheque or BACS.

Pre-payment of expenses can be made by special arrangement with the Chief Executive.

#### 4. Travel expenses

The cost of travel should be from your home or place of work, whichever is more cost effective.

HWS will ask all directors and volunteers to choose the most cost-effective method of travelling to and from/or parking at any volunteering activities, taking advantage of concessionary travel rates where applicable.

##### 4.1. Public transport

Journeys should be made by public transport and should be at the lowest possible rate, you must keep your tickets as receipts if not given a separate receipt.

When using an Oyster Card, the rate, current at time of claim, charged for a journey will be paid.

Directors and volunteers may claim the cost of standard rail travel only and journeys should be booked in advance if possible, so the cheapest standard ticket is available.

Receipts for journeys on public transport must be attached to the submitted claim form.

##### 4.2. Mileage rates

Alternatively, where public transport is not practicable, mileage rates will be paid at a rate approved by the Board and not in excess of [HM Revenue & Customs guidelines](#), to ensure that volunteers do not receive taxable profit from their volunteering activities. These rates will be reviewed annually in March, to ensure that they do not exceed HM Revenue & Customs approved rates.

- **Motor vehicle:** volunteers can claim 45p per mile on the first 10,000 miles in the tax year (1<sup>st</sup> April - 31<sup>st</sup> March) and 25p per mile for any mileage over that amount. Please collect VAT receipts for petrol to support mileage claims.
- **Motor cycles:** volunteers can claim 24p per mile.
- **Cycles:** volunteers can claim 20p per mile.

The mileage should be calculated on the return journey between the meeting venue and your home or place of work, whichever is the shorter.

HWS asks directors and volunteers who use their own motor vehicle for travel relating to their volunteering if they are taxed, insured, have an MOT (if appropriate) and that they have informed their insurance company of their volunteer driving.

Car parking fees will be refunded for any volunteering activities. Receipts must be attached to the submitted claim form.

Claims for taxi fares will only be met where the use of public transport is not practical, where possible you should always try to obtain a receipt.

You are expected to use the most cost-effective method of travel available to you.

Please supply all original receipts.

## 5. Substinence allowance

HWS directors and volunteers attending a meeting, event or training relating to the work of HWS lasting longer than 3 hours, where lunch/dinner is not provided, can claim sustenance allowance as follows:

- Lunch - up to £5.00
- Dinner - up to £10.00

Please supply all original receipts.

## 6. Consumables & miscellaneous expenses

Most reports and documentation will be produced and/or provided by the HWS staff team.

- Paper - 1 ream (500 sheets) will be provided per director/volunteer per year.
- Ink cartridges - the cost of 1 (set) of ink cartridge per director/volunteer per year.
- Miscellaneous items - any items not covered in this policy will need to be agreed before purchase by the Healthwatch Sutton CEO. Failure to do this may result in items not being reimbursed.

These payments will need to be agreed in advance with the HWS staff team.

## 7. Telephone calls

Reimbursement for the cost of essential HWS business phone calls can be made. This includes the cost of mobile phone calls. Where possible, an itemised bill should be provided in support of your claim.

## 8. Childcare/dependants care fees

If it is essential for a volunteer to incur additional carer costs in order to volunteer, then an evidenced claim can be submitted on the following conditions: care is for a child under 16 years of age; or where there is proven medical or social need. A claim is not payable if care is provided by a member of the volunteer's household; or where 'no cost' care is provided by another individual, body or organisation. Care costs must be discussed and agreed in advance.

Consideration will be given to meeting the cost of childcare or dependant care fees where you are required to meet commitments. You should discuss your needs with the Chief Executive prior to incurring expenses.

## 9. Carers

Where director and volunteers require the services of a carer for help with travel to and from meetings and other HWS business full consideration will be given to meeting the cost of the carer's travel expenses.

You should discuss your needs with the Chief Executive prior to incurring the expenses.

**Approved by Healthwatch Sutton Board of Directors: 09/03/2020**

**To be reviewed: 09/03/2023**

Volunteer Travel and Expenses Claim Form

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Telephone: \_\_\_\_\_ Email: \_\_\_\_\_

Vehicle Registration No. (if applicable) \_\_\_\_\_ Engine Size: \_\_\_\_\_ cc

**Allowance Rates as of 1<sup>st</sup> April 2011**

**Cars**

All cars 45p per mile

**Motorbikes**

24p per mile

**Cyclists**

20p per mile

<b>Mileage Claim Summary</b>					
Sub total miles by car		x Cost per mile	0.45	= Total	£
Sub total miles by m/bike		x Cost per mile	0.24	= Total	£
Sub total miles by cycle		x Cost per mile	0.20	= Total	£
Sub total parking				= Total	£
<b>Record Overleaf TOTAL (A)</b>					£

Date	Reimbursement of Public Transport	Amount
	<b>TOTAL (B)</b>	

Date	Reimbursement of Other Expenses	Amount
	<b>TOTAL (C)</b>	
	<b>GRAND TOTAL 'A'+ 'B'+ 'C'</b>	

Signed: \_\_\_\_\_ Authorised: \_\_\_\_\_ Date: \_\_\_\_\_

Reimbursement of Mileage					
Date	To:	From:	Transport Method	Miles	Parking
				<b>Total Miles by Car</b>	
				<b>Total Miles by Motorbike</b>	
				<b>Total Miles by Cycle</b>	
				<b>Total Parking</b>	

All payments are made by BACS  
 Please provide  
 Bank name.....  
 Sort code.....  
 Account number.....