# Volunteer Expenses Guidance

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## Summary

This document is to provide guidance for volunteers, customers and community members who may need to claim expenses. It describes the overall principles and the steps in the process.

Before you make your first claim, you need to provide a BACS Volunteer Expenses Form so that Finance can refund expenses directly into your bank account.

The key steps in the process are:

* Check what you are allowed to claim
* Obtain a claim form
* Send the completed form with receipts to your volunteer manager or key contact
* Finance aim to get the refund into your bank account within 12 working days.

Each of these steps is described in the sections that follow.

## Introduction

### Principles

No matter how you contribute your time, skills or experience with RNIB, we don’t want you to be out of pocket as a result of your volunteering or involvement with us. This guidance applies to you if you contribute as a volunteer, customer or community member.

The principle of this guidance is for RNIB to reimburse individuals for authorised and reasonable expenses incurred in the course of you carrying out your role.

In defining “reasonable”, it should be kept in mind that RNIB is a charity. The public, and especially our donors, would expect us to exercise due care in incurring expenses, as the provision of our services to our beneficiaries must be paramount.

The allowances given are the generally accepted maximum amounts that RNIB deem reasonable, but these can be constrained by the limits set by HM Revenue & Customs (HMRC).

In exceptional circumstances you may incur expenses that fall outside of these guidelines. In such instances you should seek authorisation from your volunteer manager or key contact prior to incurring those expenses. When you submit your expenses claim, your volunteer manager or key contact should individually authorise those exceptional items.

We’d like to make the process for making expenses claims as easy as possible. We recognise that sometimes your welfare or individual needs may occasionally override this guidance, e.g. seeking the cheapest form of travel. Please speak to your volunteer manager or the Volunteering and Resourcing team if you’re uncertain about making a claim.

### When should I claim?

Please submit your expenses claim as soon as you can after incurring the expense. Unfortunately, we cannot pay expenses that are from more than three months ago. RNIB’s financial year closes at the end of March, so please complete any expense claim by 31 March for that financial year.

Top tip: Submitting your claims on a regular basis means they don’t build up and become overwhelming. By doing them regularly you’re not out of pocket for long and you benefit from getting your money back in a timely manner.

### False claims

Please note, we will treat any case of knowingly making a false claim seriously and formally using our [Problem Solving Procedure](https://www.rnib.org.uk/sites/default/files/Volunteer_Problem_Solving_Procedure%20August%202019.docx). It is available on the website and you can also ask your volunteer manager or key contact for a copy of the Problem Solving Procedure.

### HMRC position

Expenses claimed for legitimate volunteering activities with RNIB will not be subject to income tax.

## Check what you are allowed to claim

### What can I claim for?

You can claim for the following costs relating to your contribution:

* Travel
* Meals
* Overnight accommodation – by prior arrangement with your volunteer manager or key contact.
* Phone, stationery and postage
* Carers and childcare – by prior arrangement with your volunteer manager or key contact.

Rates for meals, hotels and modes of travel are established on a periodic basis informed by HMRC published rates. The rates are set principally to cover UK expenditure.

Please discuss any other items with your volunteer manager or key contact before you incur any costs.

### Travel

Please provide details of each journey separately and outline the purpose of the journey alongside each claim. Please try to keep costs to a minimum; however, your personal safety should not be compromised for the sake of cost when travelling.

Speak to your volunteer manager or key contact as in some cases they may be able to book your travel on your behalf using our travel agency. By using this system, it will reduce the need for you to pay for travel up front and claim it back from RNIB.

#### Public transport

Please use standard fares and make use of special or reduced rate fares where possible by booking tickets as far in advance as you can.

Top tip: If you have a railcard for trains (such as a Disabled Persons Railcard) or a “Freedom” bus pass, you can use this to purchase public transport tickets at a reduced rate. This keeps the cost down for you and RNIB.

Top tip: Booking a return ticket on the train may not always be the cheapest option, sometimes two single train tickets for the same journey are cheaper. Check before you book.

#### Car use

You may use your own car for journey up to 150 miles (round trips). For longer journeys, please obtain permission from your volunteer manager or key contact. We will pay parking fees and tolls; we won’t pay parking fines or other traffic fines.

If you wish to use your own vehicle while volunteering, please make sure your insurance covers driving for volunteering. All UK insurers have undertaken not to increase premiums for volunteers, but it is your responsibility to clarify that you have the right level of cover. You must make sure your vehicle is road legal, including Tax and MOT. We will not reimburse your loss of no-claims bonus should it be necessary to claim on your insurance policy.

#### Mileage rates

These are the HMRC rates for 2020-2021:

* Cars – first 10,000 miles 45p per mile, thereafter 25p per mile (additional passenger allowance 5p per passenger)
* Motorcycles – 24p per mile
* Bicycles – 20p per mile.

#### Taxis

We strongly recommend that you use a taxi registered with a local authority, in the interests of your safety. Please seek permission from your volunteer manager or key contact before using this mode of transport, unless it is an emergency situation.

The cost of taxis (or minicabs, if more cost effective) will be reimbursed in the following circumstances:

* You have difficulties accessing public transport
* You are required to volunteer at a time when public transport is not readily available, of your safety might be compromised
* There is no alternative getting to the destination
* When transporting that are difficult or impractical to carry on public transport
* Where it will benefit the safety of a support animal such as a guide dog.

Top tip: Ask your volunteer manager or key contact if there are more volunteers going to the same destination. If so, they could potentially coordinate a meeting point, so you all go together. You’re not only doing your bit for the environment, you’re able to meet other volunteers as well as providing a cost-effective solution.

### Meals

Where appropriate, refreshments and meals may be claimed for. Please attach your receipts for any meals.

#### Meal expenses limits

* Breakfast (if leaving home before 7am) up to £7.50
* Lunch up to £6
* Beverages up to £3 per drink
* Late evening meal (if arriving home after 9pm or staying overnight) up to £20. The rate for the evening meal allows for the purchase of one drink to be consumed with the meal.
* The additional cost incurred when ordering room service is a legitimate expense if you have a disability.

If there you have a requirement in exception to this, please speak with your volunteer manager or key contact first.

### Overnight accommodation

It’s unlikely that you will need to stay overnight to carry out your role. Overnight accommodation should always be agreed in advance and permission must be sought from your volunteer manager or key contact before booking. It should only be if you’re unable to travel to training, an event or activity before it starts or if you’re unable to get home on the same day as training, an event or activity.

If you require accommodation for training, an event or activity, we strongly encourage you to speak to your volunteer manager or key contact first as it may be possible to book and pay for your accommodation centrally by using our travel agent and booking system. By using this approach, it will reduce the need for you to pay for accommodation up front and claim it back from RNIB.

Please attempt to find the cheapest accommodation available at a good standard of safety and cleanliness.

Limits to hotel rates for break and breakfast are:

* Central London - £130
* Major provisional cities - £95
* Elsewhere - £85

Considerations would be given to meet the requirements of a support animal such as a guide dog.

If accommodation within these limits cannot be found, please speak with your volunteer manager or key contact.

We have a duty of care to ensure that volunteers and staff are safe and are not left stranded. Please speak to your volunteer manager or key contact for guidance and support to get to a place of safety, should this rare event occur.

### Phone, stationery and postage

If you need to use your phone for your volunteering role, the cost of these calls may be claimed at the rate they have been billed. Please include a copy of the bill highlighting relevant calls when submitting your expense claim form.

Any stationery and/or stamps that you need to buy in order to carry out your volunteering role can also be claimed for. Receipts need to be attached to the expense claim form.

Top tip: Check with your volunteer manager or key contact to see if there are alternative solutions to you using your own phone or providing you with the stationery you may need. They may have what you need, and this could potentially save time by avoiding you going through the expenses process.

### Carers and childcare

We know this can be a barrier to volunteering, so please speak to your volunteer manager or key contact about carers or childcare costs. We will do what we can to support you while you carry out your role with us.

## Obtain a claim form

### Before making a claim for the first time

We pay expenses via BACS (Bank Automated Clearing Service). By using the automated method, it reduces costs and your expenses are paid directly into your account.

Before making your first expense claim, you’ll need to complete the “BACS Volunteer Expenses Form” so that Finance have your bank details. You only need to complete this form once.

This form can be obtained from:

* The Volunteer Welcome Pack
* The RNIB website under “[Resources and guidance for our volunteers](https://www.rnib.org.uk/volunteering/hub-for-current-volunteers/resources-and-guidance)”
* Your volunteer manager or key contact
* The Volunteering and Resourcing team

### Expense claim form

Once BACS payments have been set up, then regular claims can be submitted using the “[Volunteer Expenses Form](https://www.rnib.org.uk/sites/default/files/VolunteerExpensesClaimForm_0.docx)”.

The form can be obtained from:

* The Volunteer Welcome Pack
* The RNIB website under “[Resources and guidance for our volunteers](https://www.rnib.org.uk/volunteering/hub-for-current-volunteers/resources-and-guidance)”
* Your volunteer manager or key contact
* The Volunteering and Resourcing team

Please complete the expenses claim form, sign it and attach your receipts for all costs incurred.

### BucksVision and Sightlife Wales

If you are claiming expenses incurred for activity in BucksVision or Sightlife Wales, your volunteer manager or key contact will explain the process to you.

## Send claim to your volunteer manager

Send the signed and completed claim form with receipts to your volunteer manager or key contact. You can:

* Scan the documents and send them in an email
* Post the expense claim paperwork to them in the mail

Top tip: We all know that feeling of panic when we can’t find a receipt. Find a way of collecting receipt evidence that works for you. For example, taking a photo of the receipt on your phone. This might be handy if the receipt goes missing as you’ll still have a record of the expense.

## Volunteer manager or key contact approves the claim

Your volunteer manager or key contact may contact you to check on any queries. Once they are satisfied with the claim, they will approve it and send it to Finance for processing.

## Finance refunds to your bank account

Once your expense claim is received and checked by Finance and your BACS details are set up, claims should be processed in 12 working days. If you’re submitting your first claim, it will take longer because Finance need to set you up on the system first.

## Support with your expenses claim

You can speak with your volunteer manager or key contact for support when completing your expense claim. The Volunteering and Resourcing team is also here to provide you with support if you need help or have any questions.

Volunteering and Resourcing team

volunteering@rnib.org.uk

0303 123 9999 (option 4)

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Document ends.