

## Volunteer Expenses Summary Policy for NHS Borders Volunteers

### Introduction

This policy is for patients, carers and members of the public who are currently involved in volunteering activities within NHS Borders. The purpose of this policy is to make sure that volunteer expenses are paid in a fair and consistent way.

A 'volunteer' is any person who is not employed by the NHS but gives freely and willingly of their time to help improve the health and wellbeing of patients and service users within our services. This policy applies to volunteers that are directly engaged by the NHS and not those that work within the NHS but are managed by another voluntary organisation such as WRVS or the Red Cross. Volunteers operate in a range of activities within NHS Borders for example working with bereaved relatives in the BGH Chaplaincy, supporting the Healthy Living Network or being involved as a Public Member in the Public Involvement Partnership Group.

### NHS Borders

- Recognises and values the contribution that volunteers make to the health and wellbeing of our patients
- Is committed to making sure that volunteers are not out of pocket as a result of freely giving their time
- Is committed to a process for claiming expense payments which is as straightforward as possible

### Responsibility for payment of expenses

As a volunteer there will be a volunteer lead who supports you. The volunteer lead will be able to advise you on all aspects of volunteering and will authorise payments and make sure your expenses are dealt with in a fair and consistent way. If you need help with any aspect of your expenses please always contact your volunteer lead who will be able to help you with it.

### What travel expenses can volunteers claim?

#### Travel by public transport

Volunteers should be encouraged to use public transport to and from their place of volunteering where possible. Reimbursement should be made for the cost of travel tickets, car parking charges, toll charges, bus, underground, ferry and taxi fares (where prior approval for the use of a taxi has been given by the budget holder). Appropriate receipts, used tickets or ticket stubs must be attached to the expenses claim form.

#### Travel by private car, motor cycle or bicycle

There are two levels of car mileage allowance. Volunteers will be advised at induction of which rate applies in the reimbursement of their travel costs:

#### Commuting – (travelling from home to point of volunteering rate) \*

The 'commuting' (**travelling from home to point of volunteering**) rate which is intended to cover the cost of **fuel only** and not motoring costs is payable where volunteers use their private motor vehicle to commute between their home and the place of volunteering and are not required to use their car for their volunteering business.

#### Standard (business) mileage rate \*

The 'standard' rate, which takes motoring costs such as insurance and road tax into account, is payable when volunteers **use their own car in direct connection with their volunteering** and therefore incur business miles. This rate will be paid to volunteers who drive their own private motor vehicle in direct connection with their volunteering work, and meet the insurance requirements set out below.

## Motor vehicle insurance & driving license

Volunteers who receive 'standard mileage' allowance due to use of their private motor vehicle on volunteering business are responsible for ensuring that they have valid motor insurance. It is important that proof of insurance is requested annually. Mileage allowance will be payable only where the insurance conditions are fulfilled. Volunteers must hold a valid driving license and submit a copy to the volunteer lead before driving on NHS related volunteering activities.

## Travel expense rates

The following expense reimbursement rates are in line with current guidance set out by the Scottish Government DL 34 (2022) 'Guidance on Reimbursement of 'Out of Pocket' Expenses for Volunteers within NHS Scotland'. The cost of travelling by public transport will be reimbursed in full on receipt of appropriate receipts, tickets or ticket stubs.

The standard rate for vehicle mileage is based on the HM Revenue and Customs guidelines for the appropriate non taxable rate. This will be subject to regular review.

The following reimbursement guide for vehicle mileage costs should be applied:

<b>1. Commuting Rate</b> <b>(travel from home to point of volunteering)</b>	24p per mile ( <i>see page 1 for description</i> )*
<b>Standard Motor Vehicle Mileage</b> <b>(using your car as part of your volunteering role)</b>	45p per mile for the first 10,000 miles and 25p thereafter <sup>1</sup> ( <i>see page 1 for description</i> )*
<b>Passenger Allowance</b>	5p per mile passenger allowance is payable: ➤ * from October 2022 for the carriage of more than one passenger/patient e.g. volunteer car drivers ( <i>this is not per passenger</i> ); ➤ from October 2022 for each passenger where this relates to the carriage of other volunteers for meetings/training etc
<b>2. Motor Cycle Mileage</b>	24p per mile
<b>3. Bicycle</b>	20p per mile

Where members of the public are invited to participate in a one-off involvement activity, for example a consultation event, reimbursement will be paid at commuting rate, as the venue would be viewed as the base. This would therefore not incur business mileage.

## Other (non-travel related) expense rates

Out of pocket expenses will only be paid when the expense has been approved in advance by the volunteer lead.

Reimbursement will be made to volunteers for all reasonable expenses incurred as a consequence of volunteering activities (on presentation of a completed expense claim form and proof of expense incurred or receipts). Requests for reimbursement of non-travel related expenses should be made in advance and therefore volunteers must routinely be provided with expense payment guidelines and the volunteering out of pocket expense claim form on invitation to participate in a volunteering activity.

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<sup>1</sup> Based on the HM Revenue and Customs Approved Mileage Allowance Payment rate announced on 6 October 2022 [Guidance on Reimbursement of 'Out of Pocket' Expenses for Volunteers within NHS Scotland](#)

Non-travel related expenses may include (but are not limited to):

**a) Communication**

Volunteers should, where appropriate, be reimbursed the costs of ink cartridges, paper, labels, envelopes, telephone calls and stamps specifically incurred in the course of volunteering work on production of appropriate receipts.

**b) Carer expenses**

Volunteers should be reimbursed the costs of childcare and other carer expenses on the production of appropriate receipts or invoices. These payments will be made only where expenses are specifically incurred as a result of volunteering work. These costs should be agreed by the volunteer lead in advance.

**c) Additional expenses of people with additional needs**

All volunteers with disabilities who incur additional expenses while undertaking their volunteering duties will be reimbursed for reasonable receipted expenses.

**d) Day subsistence allowance**

An allowance of £5 per day will be paid to volunteers who undertake volunteering activities for more than five hours but not more than ten hours where meals are purchased (not payable if meals are provided). Volunteering for more than ten hours where meals are purchased (not payable where meals are provided) will incur an allowance of £15.00 per day.

**e) Twenty four hour subsistence allowance**

A twenty four hour subsistence allowance covers a period of up to 24 hours and includes expenditure on overnight accommodation and breakfast, lunch and dinner and personal incidental expenses. An allowance of up to £55 will be paid on receipted cost of bed and breakfast for an overnight stay (where the cost of accommodation is greater approval must be obtained from the budget holder in advance). Plus meal allowance of £20 plus personal incidental expenses allowance of £4.20 (expenses such as, telephone calls).

**f) Staying with friends allowance**

Where an overnight stay is necessary in the course of the volunteering and the volunteer resides in accommodation provided by friends or relatives, they can claim an allowance of £25. This is a 24-hour rate designed to cover accommodation and all meals in the 24 hour period from the start of the journey.

**g) Other expenses (including loss of earnings)**

Other expenses not outlined within this policy will be considered on a case by case basis by the volunteer lead in advance of the volunteer taking part in the volunteering activity.

**Expense payment methods**

Payment of expenses will normally be paid by cheque or direct bank transfer into the volunteer's bank account. Our Finance department will **aim** to have expenses paid within 2-3 weeks on receipt of a completed and authorised expenses claim form. To facilitate direct bank transfer a Bank Details form should be provided to volunteers within their induction materials or at the start of their volunteering activity. Where the claimant does not have a bank account the Finance Department will consider other methods of payment. Where small amounts or infrequent payment is involved the volunteer lead can make provision for payment of expenses in cash. This method should only be used where the volunteer lead maintains a

petty cash float and the volunteer completes an expense claim. Expense claims will only be payable where an expense claim form has been authorised by the budget holder and receipts have been attached, if applicable.

In exceptional circumstances, an advance of expenses can be made to individual volunteers to cover anticipated travel and subsistence expenses. Volunteers should complete and submit an expense claim form showing the actual expenses and the advance received as soon as possible following travel. The volunteer lead should follow-up all advance payments to ensure that completed expense claim forms have been received.

**Feedback and review**

Review of this policy and current rates will be reviewed on an annual basis. NHS Borders welcomes feedback from volunteers on any aspect of this expenses policy. If you have any comments please address them to your volunteer lead so they can be included in the review of the policy.

*Updated January 2023*

## CLAIM FOR VOLUNTEERING EXPENSES

PLEASE COMPLETE IN BLOCK CAPITALS

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

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

Postcode: \_\_\_\_\_ Telephone No: \_\_\_\_\_

NHS Contact Person (volunteer lead): \_\_\_\_\_

Telephone No. for NHS Contact: \_\_\_\_\_

Date	Details of Journey	Car Mileage	Travel Fares	Other Expenses (please list)	Cost of Other Expenses	Total
			£		£	
			£		£	
			£		£	
			£		£	
			£		£	
			£		£	
			£		£	
			£		£	
			£		£	
			£		£	
			£		£	
			£		£	
			£		£	
			£		£	
			£		£	
			£		£	
			£		£	
<b>For NHS Board Use Sub-totals</b>		£	£		£	

### Passenger Information

Date	Name of Passengers	Mileage

I declare that the above travelling and subsistence expenses claimed have been incurred by me. I further declare that no other claim for reimbursement from public or charitable funds has been nor will be made in respect of this claim.

Signature of volunteer: \_\_\_\_\_ Date: \_\_\_\_\_

**Please return this form to your volunteer lead**

FOR OFFICIAL USE ONLY

By NHS Board Contact: Verified by: \_\_\_\_\_ Payment agreed by (budget holder): \_\_\_\_\_ Budget code: \_\_\_\_\_

By Finance Department: Claim checked by finance: \_\_\_\_\_ Date approved: \_\_\_\_\_

## Appendix 2

### Bank details for B.A.C.S. payments

Please complete form using BLOCK CAPITALS.

Payee name:	Title ..... Forename ..... Surname .....
Home Address:	Address line 1 ..... Address line 2 ..... Town / City ..... Postcode .....
Bank/Building Society Name:	Name .....
Bank/Building Society Address:	Address line 1 ..... Address line 2 ..... Town/City ..... Postcode .....
Account details:	Sort/Swift code ..... Account No ..... Roll number .....
Communication:	Home phone number ..... E-mail address.....

Signature:

Date:

Please return completed form via:

- Email [insert local contact details]
- By post [insert local contact details]

## Appendix 3

### Insurance company confirmation of cover letter

Name

Address

Date

To (Insurance Company)

Dear Sir/Madam

I intend to undertake voluntary work for NHS Borders and I will use my vehicle to carry out voluntary duties and may carry passengers as requested. I will receive a mileage allowance for these journeys to contribute to fuel and the running costs of my vehicle. Such expenses will be in accordance with the HM Revenue & Customs tax free rate per mile. I estimate the number of miles driven under this voluntary basis will be \_\_\_\_\_ per year.

I should be grateful if you would confirm that my existing policy covers me for such volunteer driving. Please complete the bottom section of this letter and return to me. Please also confirm that my insurance policy contains a clause indemnifying NHS Borders with which I am a volunteer against third party claims arising out of the use of my vehicle for such voluntary work.

Yours faithfully (Policy Holder)

From (Insurance Company) -----

Re (Policy Number) -----

Policy Holder/ Driver -----

This is to confirm that your policy covers voluntary driving (for which a mileage allowance may be received). This also confirms that the above policy contains a clause indemnifying NHS Borders with which you are a volunteer against third party claims arising from the use of the vehicle on such voluntary work.

Official Stamp

ISSUED BY----- DATE-----