



Volunteer Expenses Policy

This policy outlines the BHF's fair and consistent approach to processing volunteers' claims for expenses.

Volunteer Expenses Policy

1. Introduction

- 1.1 Volunteers support the overall strategic aims of the British Heart Foundation (BHF). They are critical to the organisation in achieving our vision – a world without heart and circulatory diseases. We raise money to fund lifesaving research. This policy outlines the BHF's fair and consistent approach to processing volunteers' claims for out-of-pocket expenses.

2. Purpose

- 2.1 The BHF Volunteer Expenses Policy provides guidance on which expenses can be claimed and aims to promote a reimbursement procedure that is fair and consistent across the whole organisation.

3. Policy Statement

- 3.1 The BHF appreciates and values the time given by volunteers to help support our work and we are committed to ensuring that no volunteer is out of pocket because of expenses incurred whilst carrying out their role within the BHF.
- 3.2 The BHF must ensure that any expenditure is relevant to our charitable objectives and can be fully justified, therefore only reasonable expenses will be considered.
- 3.3 To ensure transparency all claims must be supported by the relevant receipts for auditing purposes. Wherever it is possible we will ask for a valid VAT receipt to be submitted along with any expenses claim made.
- 3.4 Stand-in allowance must not be paid to volunteers in any circumstances. This includes managing the shop or store in the absence of a manager. Volunteers must only be paid out of pocket expenses incurred as set out in this policy. Failure to follow this instruction would be classed as income and as such could jeopardise any benefit payments a volunteer may receive.

4. Scope

- 4.1 This policy applies to the payment of expenses to volunteers who carry out a role within the BHF.

- 4.2 Voluntary work experience placements, such as those on government funded voluntary work experience programmes, organised through Job Centre Plus, are not covered by this policy. In most cases people taking part in such programmes are eligible claim their expenses from their work experience placement provider.
- 4.3 Corporate volunteers should, where possible claim their expenses from their employer.
- 4.4 The reimbursement of expenses to volunteers is only given to cover any out-of-pocket costs that have been incurred and does not represent any financial reward or any compensation for loss of time. Payment of expenses does not change the recipient's status as a volunteer.

5. Definitions

- 5.1 For this policy, the term "Volunteer" has been used in its broadest sense: A volunteer with the BHF is someone who, without expectation of financial reward beyond reimbursement of expenses, performs an activity on behalf of the BHF without any obligation.

6. Key Responsibilities

- 6.1 The BHF will value and recognise the contribution of our volunteers and ensure there is reimbursement of agreed out of pocket expenses when eligible and supporting receipts are provided.
- 6.2 BHF staff are expected to act responsibly and to approve fair and reasonable agreed out of pocket expenses in accordance with this policy.
- 6.3 The relevant BHF Manager who is responsible for signing off volunteer expenses is expected to check that claims comply with this policy, deal with them promptly and ensure they are claimed in accordance with the correct process.

7. Expenses Eligible for Reimbursement

- 7.1 Before a claim is made, the Manager must consider the following:
- Expenses claimed are reasonable and only cover out- of-pocket expenditure.
 - Prior approval and agreement have been sought in advance with the appropriate BHF Manager such as a Shop Manager, Retail Area Manager,

8. Charging To Cost Centre

- 8.1 Expenses must be charged to the cost centre for the team or department where the volunteer performs their role.

9. Travel Expenses

- 9.1 Reasonable travel costs will be reimbursed in accordance with the following guidelines:

- Wherever possible the cheapest mode of transport should be used.
- If a volunteer is entitled to any kind of travel concession such as senior citizen pass or student pass, this must be used to minimise costs to BHF.
- Retail volunteers must have volunteered for a minimum of two hours to claim the travel expenses for that day.
- Weekly or monthly bus or train tickets are only to be paid for if they are the cheaper option and have been agreed in advance with the relevant BHF Manager.
- Monthly bus or train tickets can only be reimbursed after the ticket or pass has been used and may not be paid for in advance. For the cost of a monthly ticket or pass to be reimbursed, the volunteer must have volunteered for a minimum of 16 hours per week over a minimum of four days per week.
- If a volunteer uses their own car to get to and from their site of volunteering, contribution towards car parking may be claimed for, up to a maximum of £10 per day. Payment must only be made to cover the duration of the time volunteering and wherever possible volunteers must use the cheapest car park available.
- A volunteer using their own vehicle may also claim a contribution towards their mileage for the journey at the official HMRC (HM Revenue and Customs) rate, which is currently set as shown below, but may be subject to change.
- The current advisory mileage allowance rates per mile are:
 - 45p for cars and vans for the first 10,000 miles.
 - After 10,000 miles, the rate changes to 25p per mile.
 - 24p for motorcycles regardless of miles driven.
 - 20p for bicycles regardless of miles.
- Mileage will be capped at 15 miles each way for volunteers claiming for travel to and from a BHF shop/ store or BHF office.
- Any cap on mileage for other volunteering activities such as within community fundraising or volunteering at a BHF fundraising event, must

- be agreed in advance with the relevant BHF Manager.
- Payment cannot be guaranteed if the mileage being claimed has not been agreed in advance by the relevant BHF Manager.
- As a rule, taxi costs may not be claimed back unless in exceptional circumstances and must be with prior authorisation of the relevant Retail Area Manager, Fundraising Manager, or the Events Organiser. Exceptional circumstances may include but are not limited to situations where it is cheaper for several volunteers to share a taxi if a volunteer has health or mobility restrictions or where it would be unsafe for a volunteer to take another form of transport.
- Expenses must be claimed on a regular weekly, fortnightly or monthly basis to prevent larger amounts accruing.
- We will not be able to back date any expense claims that are submitted more than 2 months after the date being claimed for.
- Any travel expenses to be claimed that are not covered by the above guidelines must always be agreed in advance with a senior BHF Manager such as a Retail Area Manager, Community Fundraising Manager, Healthcare Innovation Manager or Events Manager.
- Air travel should only be used with prior agreement with the relevant BHF Manager and only economy air travel should be used.
- BHF will not be liable for payment of a parking or speeding fine incurred for any reason.

10. Lunch Expenses

- 10.1 As a rule, lunch cannot be claimed for, except where there is an exceptional circumstance, such as when a volunteer works away from their normal site of volunteering or is volunteering all day at a BHF Event. Where such circumstances exist, this will be outlined in the opportunity description or by prior agreement with the relevant senior BHF Manager, such as a Retail Area Manager or a Regional Fundraising Manager.
- 10.2 Where lunch expenses are eligible for reimbursement, the limit on how much can be claimed back must be agreed in advance with the relevant BHF Manager.
- 10.3 Alcoholic beverages will not be reimbursed.

11. Overnight Accommodation

- 11.1 When hotel or overnight accommodation is requested or required, the cost must be agreed on in advance with the BHF Manager.

- 11.2 Such payments are limited to non-fundraising events and one of following situations:
- When an event runs over several days.
 - Where the journey would require a volunteer travelling before 6.30 am or would result in a volunteer returning home after 11pm.
 - If a volunteer has health issues that means it would be in their best interests to have an overnight stay.
- 11.3 Wherever possible overnight accommodation should be booked in advance by the relevant BHF Manager using the Corporate Travel system (currently ArrangeMy) or by using a BHF Company Credit Card.
- 11.4 Where an overnight stay has been agreed, the BHF will also cover the cost of an evening meal before the stay and breakfast the morning after and is subject to a maximum cost agreed in advance.
- 11.5 Where possible such meals will be paid or in advance by the BHF when the accommodation is booked.
- 11.6 All accommodation and related meals must be booked in accordance with the BHF Staff Expenses Policy.
- 11.7 There are occasions when the BHF may invite a volunteer to attend an event such as the BHF Annual Reception or the Volunteer of the Year Celebration Day. In such cases the volunteer may be asked to bring a chaperone or guest to attend the event with them, if so the BHF will also cover the costs of any travel or accommodation required for their chaperone/guest.
- 11.8 Any travel or accommodation required for a volunteer chaperone or guest must also be processed in full accordance with this policy.

12. Children & Young People

- 12.1 If a volunteer aged 16-18 is invited to attend a BHF event that is being held outside of their normal place of volunteering and their parent/guardian are not happy for them to travel alone, then the BHF will pay the travel expenses for the responsible adult who will be travelling with them.

13. Volunteer Stock Collection Drivers (Retail Only)

- 13.1 Volunteers who use their own vehicle for collecting stock donations must inform their insurance company that they are using their vehicle for this purpose.
- 13.2 If the volunteer's insurance company charges an administration fee for updating their insurance policy, the BHF will contribute £25 towards the reimbursement of this fee. Evidence of the administrative charge must be submitted along with the claim.
- 13.3 Any payments towards insurance administration charges must be agreed in advance with the Retail Area Manager. The BHF will not reimburse any additional direct insurance charges for increased cover.
- 13.4 Volunteer Stock Collection Drivers may claim a contribution towards their mileage for each journey they make at the HMRC Approved Mileage Allowance which is currently set at 45 pence per mile but may be subject to change.
- 13.5 Volunteer stock collection drivers can only be reimbursed for their out-of-pocket expenses after a member of BHF staff has completed the Volunteer Driver Activity Planner on My Retail Hub in respect of the claim.

14. How To Process a Claim for Expenses

Retail Volunteers

- 14.1 All claims must be processed through the till and payment made in accordance with current BHF petty cash procedures.
- 14.2 All payments must be accompanied by receipts and signed for by the paid member of staff who has processed the payment through the till and by the volunteer receiving the payment.
- 14.3 Any claims for expenses that are not covered in this policy can only be made with prior approval from the relevant BHF Retail Area Manager.

Fundraising Group and Lead Volunteers, Action Team Volunteers, Healthcare Innovation Volunteers and Office Volunteers

- 14.4 All expenses are to be claimed by submitting a volunteer expenses form,

which can be obtained from the relevant BHF Manager. All claims must be accompanied by the appropriate receipts.

- 14.5 Expenses must be adequately described on the expenses form and failure to do so may result in non-payment.
- 14.6 Expense claims should be submitted promptly and should only include expenditure that has occurred within the last two months.
- 14.7 Travel using London Underground and buses on Oyster cards that cost less than £5 do not require a receipt to be claimed for. Travel using all other contactless payments must be accompanied by a valid receipt.
- 14.8 Expense claims forms must be authorised by the relevant BHF Manager before being sent to the Finance Department for payment.
- 14.9 Any other expenses that are not covered in this policy may only be claimed with prior agreement of the relevant BHF Manager.
- 14.10 Payment will be made by BACS transfer or by cheque so volunteers making a claim must provide all the necessary bank details. The volunteer's preferred method of payment (BACS or cheque) must be agreed in advance with the relevant BHF Manager.
- 14.11 BHF Managers should authorise payment as quickly as possible to avoid volunteers being left out of pocket for any length of time.
- 14.12 Payment should be made within 30 days of submission of the claim.

Action Team - Event Volunteers

- 14.13 A minimum of two hours volunteering in a single day required to claim expenses.
- 14.14 The relevant BHF Manager will authorise travel expenses to and from the event site.
- 14.15 The BHF Events team will authorise the reimbursement of mileage and parking as applicable. Staff & volunteer parking is available at some of BHF events, please ask your volunteer/event manager prior to the event. Where free parking is not available the BHF events team will reimburse a maximum of £10 per day for parking. Payment must only be made to cover

the duration of the time volunteering and wherever possible volunteers must use the cheapest car park available.

- 14.16 An event volunteer using their own car can claim a contribution towards their mileage for the journey at the official HMRC rate, which is currently set at 45 pence per mile, but may be subject to change. Mileage will be capped at 15 miles each way for travel to and from the event site.
- 14.17 Note: A combination of travel expenses including public transport, parking and mileage can be claimed for travelling to and from one event. If this is required, the claim will be capped at a total of £25.
- 14.18 All event volunteers are encouraged to come to events prepared with their own water, ready to eat snacks and lunches: we are unable to guarantee onsite kitchen facilities as BHF events are sometimes held in remote locations or temporary set ups. When an event volunteer volunteers for 6 hours or more the event manager is authorised to offer catering from an on-site caterer or reimburse up to the value of £5 for a local purchase. This will be confirmed in your pre-event information.
- 14.19 Only in exceptional circumstances can we offer overnight accommodation. This must be agreed with the event manager at least 2 weeks in advance of any accommodation bookings being made or attending any events. All accommodation bookings will be made directly by the relevant BHF manager in accordance with section 11 of this policy.

Community Fundraising Groups Volunteers

- 14.20 All fundraising income generated by volunteers must be banked in full so that the total amount raised is accounted for and recorded correctly. Money cannot be held back from income generated as a 'float' to pay for future events or resources such as room hire or deposits.
- 14.21 In such cases where payment is needed upfront, the relevant BHF Manager will need to arrange payment and then claim this back in accordance with the BHF Staff Expenses Policy. If a volunteer does choose to pay in advance, they can then claim this back as an expense on the correct expenses form.

Community Fundraising Branch Volunteers (Specific)

- 14.22 The full amount of money raised at any event or through any fundraising activity must be recorded in full on the income section of the Income &

Expenditure Form.

- 14.23 All expenses must be recorded in full on the expenditure section of the Income & Expenditure Form.

Board Of Trustees and Sub Committee Members

- 14.24 All expenses are to be claimed by submitting the appropriate expenses form, which can be obtained from the BHF's Assistant Company Secretary. All claims must be accompanied by the appropriate receipts.
- 14.25 Claim forms must be authorised by the current budget holder for the Board of Trustees expenses before they can be processed by the finance department.

Marketing And Communication Volunteers

- 14.26 Occasionally, the BHF collaborates with people who volunteer their time to highlight the work of the BHF e.g., as a case study or as an ambassador. This can include heart patients, celebrities, and medical researchers.
- 14.27 Every effort must be made to keep expenses payments to a minimum and to adhere to this policy, however there will be situations where it would not be appropriate to restrict payment and could potentially jeopardise the opportunity for the BHF to benefit from this exposure or endorsement the volunteer or supporter can give to it.
- 14.28 The relevant BHF Manager must use their discretion when paying expenses that fall outside this policy by balancing the expense against the potential benefit to the BHF. Where claims should be submitted using the appropriate expenses claims form.
- 14.29 In cases of celebrity support, an Agent working for the celebrity may arrange travel, accommodation, food, and other necessities and then claim back the costs from the BHF.
- 14.30 All payments must be authorised by the relevant BHF Manager before the payment is processed by the finance team.

15. The Consequence of Non-Compliance

- 15.1 Any failure by the BHF, BHF staff or volunteers to comply with this policy will

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impede the BHF's capability of achieving its mission to create a world free from the fear of heart disease.

- 15.2 Any abuse or misuse of volunteer expense payments will be treated very seriously and may result in a volunteer being asked to cease their volunteering and in the case of paid staff disciplinary action may be taken.

16. Communications And Training

- 16.1 The implementation of this policy will be communicated to all BHF staff who interact with volunteers. It is not anticipated that formal training on this policy will be necessary.

17. Monitoring And Review

- 17.1 The Volunteering Team within the People and Organisational Development Directorate will be responsible for the development, implementation, and monitoring of the policy.
- 17.2 This policy will be monitored and reviewed every two years to ensure it is fit for purpose.

18. Contact Information

- 18.1 For further information on this policy please contact the Volunteering Team within the People and Organisational Development Directorate.



British Heart
Foundation

BRITISH HEART FOUNDATION GENERAL EXPENSES FORM (NURSES AND VOLUNTEERS)

NAME..... DEPARTMENT..... PERIOD.....

DATE OF EXPENSE	EXPENSE DETAILS (Include Name of Study/Training/Meeting Day if appropriate) <i>Please provide as much information as possible</i>				RECEIPT NUMBER	£	NOMINAL CODE	COST CENTRE	PC1	PC2	PC3
Total business miles this month		@		PPM		£0.00					

Signature of the claimant.....

Total claim: £ Finance use only

Print name.....

Finance Authorisation.....

Date.....

Payment date.....

Authorised by.....

Cheque No.....

Print name.....

BACS Date.....

Date.....

****Bank details must be provided for all staff expenses**** These details should be included on every claim submitted (A cheque may be provided if the BHF do not have your bank details).

**** Account No.....**

Sort code.....

This form must be signed by the claimant and authorised by a Head of Department/Division before forwarding to Finance Payment

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