

# Volunteer Expenses Policy and Procedure

## Patient and public involvement

### Document Reference Information

Version:	1
Status:	Draft
Author:	Engagement Team
Directorate responsible:	Communication and Engagement
Directorate lead:	Tom Grove
Ratified by:	Joint Commissioning Committee
Date ratified:	25 March 2020
Date effective:	1 April 2020
Date of next formal review:	3 years from effective date
Target audience:	Volunteers

### Version Control Record

Version	Description of change(s)	Reason for change	Author	Date

## Contents

1.	Introduction .....	3
3.	Benefits of paying the expenses to volunteers .....	3
4.	Items that can be claimed for .....	3
4.1.	Travel expenses .....	3
4.2.	Bus journeys.....	4
4.3.	Train and underground routes.....	4
4.4.	Taxis .....	4
4.5.	Private cars, motorcycles and bicycles .....	4
4.6.	Car or motorcycle parking costs.....	5
4.7.	Subsistence Costs.....	5
4.8.	Carers' costs.....	5
5.	Exclusions.....	6
6.	How payments will be made.....	6
7.	Process for claiming expenses.....	6
7.1.	Registered 'supplier' confirmation.....	7
7.2.	Making a claim.....	7
7.3.	Keeping a record .....	7
9.	Appendices .....	8
9.1.	Appendix 1.....	9
9.2.	Appendix 2.....	9

## 1. Introduction

- 1.1. Herefordshire and Worcestershire Clinical Commissioning Group (CCG) is committed to the full participation of volunteers when reviewing, developing or implementing services. This commitment acknowledges the skills and experience they bring to the planning and development of services and the value that their full participation adds to the richness of decision-making. All staff should ensure that the volunteers they intend to work with, understand the contents of this policy and are clear about claiming expenses.

## 2. About the policy

- 2.1. This policy is about the payment of expenses available to volunteers who are actively involved in supporting NHS Herefordshire and Worcestershire CCG.
- 2.2. The CCG is unable to pay volunteers for their contribution; however, this policy ensures that they will not be 'out of pocket' after taking part in engagement and participation that has been agreed by the CCG's engagement team.
- 2.3. For the purpose of this policy 'volunteers' are defined as people who have used, are using, or may use services – such as patients, informal (unpaid carers) and residents of Herefordshire and Worcestershire who have agreed to take part in activities with the CCG.

## 3. Benefits of paying the expenses to volunteers

The CCG recognises the benefits of paying expenses to volunteers:

- It is a real way to acknowledge the contribution to the development of services from volunteers.
- removes barriers that stop people taking part
- It allows for a broader range of volunteers to be involved

## 4. Items that can be claimed for

### 4.1. Travel expenses

- 4.1.1. All volunteers asked to participate in the business of the Herefordshire and Worcestershire CCG will be entitled to claim out of pocket expenses.
- 4.1.2. All claims will need proof of purchase or some form of evidence of expenditure. Where possible, volunteers will need to provide receipts (including parking costs) to attach to the Volunteer Expenses Claim Form (Appendix 1). All sections of the form must be completed and signed.
- 4.1.3. The following sections outline the expenses that will be offered to volunteers when they have incurred costs in the course of agreed involvement and participation.

## 4.2. Bus journeys

- 4.2.1. The cost of the fare for the journey undertaken (standard class ticket). The ticket should be kept and attached to the expense claim form.

## 4.3. Train and underground routes

- 4.3.1. The cost of the fare for the journey undertaken (standard class ticket). If it is not possible to keep the ticket, but the name of the station(s) travelled to and from should be noted on the expense claim form, and a receipt attached if available.

## 4.4. Taxis

- 4.4.1. There will be no reimbursement of taxis or private hire vehicles unless prior agreement has been given by the engagement team. Wherever possible, a member of the engagement team will pre-book the taxi. Expenses for taxis will only be approved for those who are unable to use other forms of transport, for example, due to disability.

## 4.5. Private cars, motorcycles and bicycles

- 4.5.1. Costs based on mileage, calculated on the most direct route from home to the venue and return. The mileage rate will be paid at 45p a mile.
- 4.5.2. Mileage claims will be checked upon receipt using an online tool e.g. google maps / RAC Route Planner / AA Route Planner. If the mileage claimed varies greatly from the direct route, please discuss this with the engagement team. Discretion can be applied by the engagement team if it has not been possible to take the most direct route. In these instances, individuals are asked to provide additional information about their journey on the Volunteer Expenses Claim Form.
- 4.5.3. If a private car or motorcycle is used, it is the responsibility of the individual to ensure and to make a declaration that:
- their motor insurance covers the activity for which the journey is being made (health / social care business)
  - the driver holds a valid driving license
  - the vehicle being used has had the appropriate taxes paid
  - the car or motorcycle has a valid, in date MOT certificate
- 4.5.4. Any loss or damage caused to your own car or motorcycle while using it on health/social care business should be covered by the volunteer's insurance and breakdown cover, and it is their responsibility to ensure this.

## 4.6. Car or motorcycle parking costs

- 4.6.1. The cost of any necessary parking can be claimed and the parking ticket or a receipt should be submitted with the claim form.

## 4.7. Subsistence Costs

- 4.7.1. Volunteers who are required to attend engagement activities in the course of their work may claim subsistence allowances in accordance with the following rules at the rates shown in Section 18 of the Agenda for Change NHS Terms and Conditions Handbook on the NHS Employers website, accessible through the following web address: <https://www.nhsemployers.org/tchandbook>
- 4.7.2. It is essential that volunteers making claims under the subsistence rules produce original receipts in accordance with Section 18 of the Agenda for Change NHS Terms and Conditions Handbook. Without original receipts these items will not be reimbursed.
- 4.7.3. The amounts that can be claimed are normal maximum amounts and should only be claimed by volunteers where they have been incurred above normal expected costs. Where it is anticipated that a claim may need to exceed the allowable maximum, for example hotel accommodation, it must be agreed in advance by the senior engagement manager and the employee's Line Manager.
- 4.7.4. The costs of meals whilst engaged on approved activities can only be claimed where meals are not provided, as follows:
- Meal Allowance - For any involvement in engagement activities of at least 5 hours including the hours of 12.00 to 14.00 hours.
  - Evening Meal Allowance - For any involvement in engagement activities of at least 10 hours extending beyond 19.00 hours.
  - Day Meal Allowance - For any involvement in engagement activities of at least 24 hours.
  - Incidental Expenses Allowance - For any involvement in engagement activities where the accommodation and meals are provided without charge to the volunteer.
- 4.7.5. The above subsistence payments must not be claimed where the meals are provided free of charge as part of the business / training event.
- 4.7.6. In exceptional circumstances, where an overnight stay is required this will be arranged and paid for by the CCG.

## 4.8. Carers' costs

- 4.8.1. The costs of a 'Sitter', to enable a carer to participate in engagement and involvement activities will be reimbursed, but must be negotiated and agreed in advance with the engagement team or their representative.

- 4.8.2. If an individual needs a paid personal assistant to enable them to participate in agreed activities, the cost of the personal assistant's hours while in attendance and their travel time to get to the venue can be claimed (travel time will be calculated as from the home of the individual participating in the activity to the venue and back). It is expected that the personal assistant will travel with the individual and it is noted that time is required at the start and end of journeys for the personal assistant to support the individual into and from vehicles. Additional mileage where the personal assistant travels independently of the individual will not be paid.

## 5. Exclusions

- 5.1. NHS Herefordshire and Worcestershire CCG will not refund other expenses such as computer, telephone or stationery costs. If the costs to the volunteer are prohibitive, alternative arrangements can be made in discussion with the engagement team (for example, documents will be printed).
- 5.2. Attendance at open public meetings does not qualify for reimbursement of expenses, for example, the NHS Herefordshire and Worcestershire Governing Body meeting, unless attendance is formally requested and agreed by the CCG's engagement team.
- 5.3. If attending a CCG meeting on behalf of another organisation e.g. a GP Practice, then expenses will not be reimbursed by the CCG.

## 6. How payments will be made

- 6.1. Expenses claims must be made within three months of the activity, anything claimed for outside of this timescale may not be paid.
- 6.2. All volunteers must register with the Herefordshire and Worcestershire CCG as a member of the Herefordshire and Worcestershire Involvement Network (HWIN) on the following webpage: **INSERT**.
- 6.3. To claim expenses they will need to register as a 'supplier' (the term used by our finance system for those supplying a service to the NHS) providing their payment details. To do this please complete the Volunteer Supplier Form (Appendix 2). The CCGs preferred payment method is by BACS.
- 6.4. If the volunteer has not received payment within a month of submitting their claim, they should contact the engagement team.

## 7. Process for claiming expenses

## 7.1. Registered 'supplier' confirmation

- 7.1.1. If you have been paid by the Herefordshire and Worcestershire CCG after April 2020 then you have been set up as a supplier.
- 7.1.2. If you were paid before April 2020 or have never been paid please complete a Volunteer Supplier Form (Appendix 2). Please be aware that email communication may not always be secure, therefore you are advised to suitably encrypt any documents that you send via email that have your personal details enclosed. Alternatively, you can post your form to the address below.

## 7.2. Making a claim

- 7.2.1. Please complete and sign the Volunteer Expenses Claim Form, attaching any receipts/tickets where necessary.
- 7.2.2. Please complete and submit your expenses within three months of completing the activity.
- 7.2.3. You can either post (using the address below) or email your Volunteer Expenses Claim Form to the engagement team at [hw.engage@nhs.net](mailto:hw.engage@nhs.net) \*\*Please be aware that email communication may not always be secure, therefore you are advised to suitably encrypt any documents that you send via email that have your personal details enclosed.
- 7.2.4. Postal address: Engagement team, Herefordshire and Worcestershire CCG, The Coach House, John Comyn Drive, Perdiswell, Worcester, WR3 7NS
- 7.2.5. The engagement team will check the Expenses Claim Form (using an online tool e.g. Google Maps / AA Route Planner) and process your claim.

## 7.3. Keeping a record

- 7.3.1. We recommend that you keep a record of your expenses claim. If you have not received payment (this will be straight into your bank account) within a month, please contact the engagement team. Please note that if you are registering as a supplier as well as submitting your form this could be up to two months.

## 8. Contact

- 8.1. The engagement team can be contacted by telephoning 01905 681978 or by emailing [hw.engage@nhs.net](mailto:hw.engage@nhs.net)
- 8.2. This document can be made available in large print, Braille, other languages or an audio copy please contact the engagement team.

## 9. Appendices

- Appendix 1 – Volunteer Expenses Claim Form
- Appendix 2 – Volunteer Supplier Form



## 9.1. Appendix 1



Herefordshire and  
Worcestershire  
Clinical Commissioning Group

### Volunteer Expenses Claim Form

Please complete the table for each activity you have been invited to take part in with the Worcestershire CCGs and return to the address above or [hw.engage@nhs.net](mailto:hw.engage@nhs.net) (please note that this is not a secure email pathway).

Date	Detail of Activity	Journey From	Journey To	Total car mileage (at 45p/mile)	Public Transport	Other	Total

Total Claimed =

Remember to attach any relevant tickets & receipts.

I confirm that I have incurred the above expenses, and that the expenses and claim for payment are in line with the Volunteer Expenses Policy and Procedure. If claiming for mileage I confirm that I have a valid driving license and my vehicle is insured for this use.

<b>Supplier Number</b>	
<b>Name</b>	
<b>Address</b> (inc postcode)	
<b>Telephone Number</b>	
<b>Signature</b>	

**Return to:** Engagement team, NHS Herefordshire and Worcestershire CCG, The Coach House, John Comyn Drive, Worcester, Worcestershire WR3 7NS

-----  
**CCG Use Only:**

<b>Approval Signature</b>		<b>Payment Requested?</b>		<b>Date</b>	
---------------------------	--	---------------------------	--	-------------	--

## 9.2. Appendix 2



Herefordshire and  
Worcestershire  
Clinical Commissioning Group

### Volunteer Supplier Form

I will be submitting claims for payment of Volunteer Expenses as detailed below:

<b>Supplier Details:</b>	<b>Name:</b> <b>Address:</b> <b>Telephone Number:</b> <b>Email:</b>
<b>Signature:</b>	
<b>Date:</b>	
<b>Payment</b>	The CCG preferred method of payment is by BACS, please complete your details below:
<b>Bank Details:</b>	<b>Bank Name:</b> <b>Bank Address:</b>
<b>Bank Sort code:</b>	
<b>Bank Account Number:</b>	

**Return to:**  
Engagement Team  
NHS Herefordshire and Worcestershire CCG  
Herefordshire and Worcestershire CCG  
The Coach House  
John Comyn Drive  
Perdiswell  
Worcester  
WR3 7NS