

# Volunteer Expenses Policy

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## 1. Purpose and introduction

To provide a policy and associated procedures for reimbursement of expenditure incurred by RNLI volunteers, for reasonable and authorised RNLI related activities if they so require it.

Whilst recognising the right of the volunteer to claim legitimate expenses, volunteers, like staff within the charity, are asked to keep costs to a minimum. This procedure is to inform those who wish to claim expenses, and we recognise many volunteers may not wish to do so.

### Volunteers at Stations

This document provides guidance on claiming out-of-pocket expenses, for example personal expenses incurred while on a training course, travel, mileage, and subsistence. These types of expenses are currently paid at stations, by cheque. These entries are shown on Salesforce.

### Volunteers at Branches

For branches, this policy covers expenditure that has not or cannot be paid via the charity credit card. Please see separate guidance on the use of the RNLI credit cards for further details. It is intended that, wherever possible, the RNLI credit card should be used for payment to minimise out-of-pocket spending and the reclaim process. These items are shown on Salesforce.

## 2. Scope

This policy is designed for authorised, general out of pocket expenses, for volunteers at stations and branches.

Any expenditure should be in keeping with the organisation's charitable status, be economical and authorised by an appropriate person **prior to being incurred**.

All such expenses must be incurred wholly, exclusively and necessarily by the volunteer during RNLI related activities.

Please note it does **not** cover the Lifesaving Operations Department procedures that already exist for claiming:

- Service and Exercise Allowances
- Training Allowances (including associated expenses of passages, personal allowances and those related to training courses)
- Relief Payments
- Retaining Fees

For further information please contact your Area Operations Manager (AOM), Community Manager (CM), or the Regional Support Team.

## 2.1 This policy applies to:

All Station and Branch volunteers. Please refer to your AOM or CM for further information.

## 3 Audit trails

The expenses form will be subject to audit on a routine, or random basis, as part of the RNLI's standard financial procedures.

## 4 Specific Expenses Guidelines

The following rules are subject to the terms of the overall policy (Section 2 above).

### 4.1 Travel

It is essential that travel claims are restricted to those extraordinary journeys beyond the normal place of volunteering and deemed absolutely necessary. Please arrange travel through the Regional base where possible. Travel should be planned where possible to take advantage of advance fares and rates, and to identify more economical days or times of day to travel. The number of individuals travelling must be kept to a minimum. The most cost-effective relevant mode of travel should be used.

#### 4.1.1 Travel (Private Vehicles)

The reclaim of vehicle costs will be based on the volunteer being classed as a casual user. The use of a volunteer's private car for RNLI activities is subject to the conditions stated in the RNLI Volunteer Driving Policy.

The costs of business mileage can be reclaimed at the relevant rate set out in Appendix 2. These are regularly updated in line with HMRC/Revenue guidelines. To enable the RNLI to potentially reclaim the associated VAT, volunteers are requested to submit VAT receipts for fuel purchased ahead of or during business trips wherever possible. Receipts should be dated within a reasonable period before the start of the journey. In the form, please include the start and destination for your journey.

Car parking, tolls and ferry charges incurred on the journey may also be reimbursed when supported by receipts, where possible.

#### 4.1.2 Air Travel

Economy class **must** be used, and the most cost-effective ticket purchased. Only where flexibility is a requirement may a more expensive flexible ticket be obtained.

#### 4.1.3 Ferry travel

Daytime ferry travel should be second class. A cabin may be booked for overnight crossings exceeding six hours or for security reasons.

#### 4.1.4 Trains

Rail travel should be used in preference to air travel, if there is a choice and providing that the journey is expected to last three hours or less. Second class **must** be used for all rail travel. Where possible, meetings should be arranged in line with departure times that offer cheap day returns. Wherever practical, rail travel should be used in preference to the use of a private car.

#### 4.1.5 Buses, underground and other public transport

These may all be used. Volunteers are expected to use the most reasonable and convenient method of transportation available, having regard for cost and time. Where payments are made through Oyster or contactless card, receipts will not be available.

#### 4.1.6 *Taxis*

Taxis could be used for reasons of safety when alternative transport does not exist or when it makes financial sense to do or where other means of transport are not available or appropriate, or if with a heavy load or awkward luggage or where safety is a concern. All of the above **must** be substantiated by a receipt or the priced ticket.

### 4.2 Booking through the Regional Base

Long-distance travel using public transport and hire cars should be booked through the Regional Base to take advantage of economies of scale and the opportunity to recover VAT.

### 4.3 Accommodation and subsistence

Where a volunteer is required to travel and spend nights away from home for agreed RNLI volunteering activities, then these expenses are to be reclaimed as the actual cost of overnight accommodation and meals.

The most cost-effective accommodation should be used, and booking should be arranged in advance, to benefit from better pricing. This could be a hotel chain, such as Travel Inn/Holiday Inn, or The Lifeboat College when staying in Poole. In the absence of such hotel chains, the standard of accommodation should be 'reasonable' with grades up to three stars or equivalent wherever possible. Local bed and breakfast accommodation should also be considered. Volunteers could consider whether they require breakfast or an evening meal when booking accommodation, as booking all requirements together can offer better value. All expenses should be supported by the hotel bill, which must be the VAT invoice, not a credit card payment slip.

### 4.4 Alcohol

Alcoholic drinks will not be reimbursed as part of a subsistence claim. If alcohol is purchased, then this expense should be borne by the individual.

You may purchase alcohol for a fundraising event – this expense should be covered by the credit card.

### 4.5 Subsistence guideline rates

The RNLI publishes guideline rates, above which it does not believe expenditure is generally reasonable. These are included in **Appendix 3** and are in line with Revenue scale rates. For guidance, the cost of the meal should be no more than the allowance rates. While it is expected that establishments and meals can generally be chosen to fall below these rates, it is also recognised that in some circumstances it is unavoidable to spend more.

The expense claim submitted **must** be for the actual amount spent and supported by receipt e.g. lunch £3.50, and **not** for the guideline rate.

#### 4.6 Telephone charges

Call charges must be claimed using the normal expense procedure supported by itemised telephone bills.

Volunteers should, where possible, make calls only at the cheapest times, using the cheapest call rates.

#### 4.7 Office/Event Administration expenses

Actual costs incurred should be claimed e.g. stamps, milk and supported by VAT receipt where the expense has VAT applied.

#### 4.8 Other expenses

There may be circumstances where Volunteers may incur other expenses on behalf of the organisation that does not fall into the above categories. In all cases the expense **must be authorised in advance** by an authorised staff member and be submitted for payment with the supporting invoice/receipt.

#### 4.9 Event Expenses Incurred by Volunteers (Fundraising Branch only)

Event expenses incurred by a volunteer can be reimbursed via this policy

### 5 Responsibility

All volunteers referred to within the scope of this policy are required to be familiar with the terms of this policy.

Individual volunteers and support members of staff are responsible for ensuring that this policy is applied within their own area. Any queries on the application or interpretation of this policy must be discussed with the AOM or CM prior to any action being taken.

### 6 Non-compliance

Non-compliance with this policy should be referred to the appropriate senior support member of staff for investigation. This may invoke the Volunteer Problem Solving Policy.

### 7 Changes to the Policy

The Finance department has the responsibility for ensuring the maintenance, regular review and updating of this policy and supporting appendices.

## Appendix 1: Claim Procedures

Other than the exclusions defined in Section 2 (operational expenses), expenses must be claimed using the following procedures.

### Local station payments

Payment of expenses for station volunteers in GB & the Islands: currently may be made from the station account by the Lifeboat Treasurer. A cheque will be issued.

Payment of expenses for station volunteers in Ireland: authorised claim forms with receipts must be submitted to your AOM, who will forward the expenses via the Regional Support team to Accounts Payable for processing.

### Local branch payments

Payment of fundraising branch expenses are made using the RNLI credit card (see separate procedure) or reclaimed by the individual, using this procedure.

### Claim form

**For all expense claims, the form in [Appendix 3](#) must be completed for each claim. The name of the volunteer must be clearly marked on the claim form.**

Please remember that you, the volunteer, are responsible for the correct completion of the claim form. The form must be signed by the claimant. If there are any errors, omissions or any of the following have not been complied with, then the form will be returned to you via the authorising person. Please help the RNLI process claims quickly by ensuring the claim is complete, accurate, and orderly before submitting it for authorisation and subsequent payment.

### Authorisation

Expenses must be authorised prior to the cost being incurred by the appropriate individual, as detailed below. Payment will not be made without the authorising individual's signature on the claim form.

There are two levels of authorisation:

Level 1 – **up to £250/€250** per singular claim by an individual volunteer – a nominated RNLI local representative can authorise.

- Lifeboat Operations Manager (LOM) or the Lifeboat Treasurer (LT) at a lifeboat station.
- The Branch Chairman or Branch Treasurer at a fundraising branch.

Level 2 – **over £250/€250** per singular claim by an individual volunteer – the AOM for the station must authorise or the Community manager for the branch. The completed form and any accompanying paperwork need to be emailed to [Branch\\_Accounts@rnli.org.uk](mailto:Branch_Accounts@rnli.org.uk) for a payment to be made.

An individual may not authorise their own expenses.

### How to send expense forms for approval

- If the claim requires authorisation by AOM/CM, please scan and send the claim form via email.
- For volunteers who do not have access to scanners or technology to send the forms electronically, please post all documentation to the authorising individual.

### Timing and Payment

The claim for reimbursement of expenses should be made as soon as practicable after the actual cost has been incurred.

All claims must be submitted to the authorising person for approval prior to submission of payment. Claims must be made promptly, and any claims made over 3 months old may not be approved for payment.

### Reimbursement

The authorising individual (e.g. Treasurer, AOM, CM) will pass the claim to the Accounts Payable team for processing (or via Regional support in Ireland). Reimbursement will be made by bank transfer to the volunteer's bank account. Expense payment runs are undertaken fortnightly.

### Supporting documentation

All items must be supported by a receipt, bill or invoice with a clear reference to the receipt on the claim itself.

Supporting documentation needs to be an invoice addressed to the RNLI, with the VAT shown separately from the Net amount, with the company's VAT registration number. Proforma invoices are not accepted. This needs to be sent to RNLI Poole using the Freepost address.

Please send to:

**RNLI**  
**FREEPOST**

### Vehicle mileage

The form in Appendix 3 should be used for all mileage claims, regardless of value, and will act as the receipt. The mileage rate being claimed and total mileage cost should be calculated and entered on the form for payment

### Totals

Please ensure that column totals are entered, where necessary, and that these totals are accurate when the claim form is being used.

### Other expenses

For categories of expenditure not covered by the other headings, entry needs to be made in 'other expenses', with a clear description of the expenditure being claimed. It is important to note that this expense policy cannot be used by volunteers to claim expenses in lieu of 'loss of earnings'.

## Appendix 2: Private Vehicle Mileage Rates and Subsistence guideline rates

When travelling to the event, in line with the RNLI Volunteer Handbook, the following rates may be claimed:

UK and Ireland

Click [here](#) for the up-to-date rates.

## Appendix 3: Claim forms

Expense claim form: Sterling and Euro

Click [here](#) for the forms