



Expenses Policy

It was acknowledged that volunteers should be encouraged to seek reimbursement for any costs they have incurred in their advocacy work. A number of volunteers don't bother to do this yet we do have funds specifically available for volunteer expenses. Staff will always stress to volunteers the appropriateness of claiming.

Any costs included here are as examples only. A more detailed breakdown of reimbursement costs is available from the AdvoCard office (see fig 3.)

Floats out with the AdvoCard office

The issue of floats will need to be readdressed with volunteers. These may be particularly relevant to one to one work, where volunteers come in to the office less frequently to claim their expenses. Staff to consult with volunteers.

Travel and mileage

Volunteer travel reimbursement should be paid when a volunteer has used their own money to get to and from an advocacy request either to the AdvoCard office or another location. They should also be reimbursed for any travel costs incurred during advocacy work being conducted. In essence the volunteer should never be out of pocket.

Milage:

Car	40p per mile up to 4000 miles
	23p per mile 4000 miles and over

Motorcycle	24p per mile
Cycle	20p per mile

Any person choosing to use their car for long distances over the use of public transport will be reimbursed to the amount equivalent to the cost of the fare on public transport to that destination.

This may be flexible in exceptional circumstances at the discretion of the staff team. Examples of exceptional circumstances would be where public transport is not convenient; where the use of public transport would cause inconvenience eg childcare and where disabilities or phobias prevent the use of public transport.

In the event of one of the above exceptions becoming relevant AdvoCard reserves the right to cap the amount we reimburse for reasons of limited funds. The amount will be negotiated depending on the destination and the relevance to AdvoCard.

Volunteers out with Edinburgh

With regard to volunteers who live outside Edinburgh and will need to travel longer distances to come in to Edinburgh to do voluntary work AdvoCard reserves the right to negotiate the extent to which we reimburse dependent upon individual circumstances.

AdvoCard will consult with other organisations to bring us in line with them and to standardise the way we treat volunteers who live outside Edinburgh. We will make it very clear to any new recruits that they volunteer for AdvoCard in the full knowledge that reimbursements will be limited.

Parking charges

Any parking charges incurred while conducting advocacy work will be fully reimbursed, ideally with a parking ticket as a receipt but also when a charge has been incurred through the use of a parking metre and there is no ticket available.

Parking fines

Under no circumstances is AdvoCard able to reimburse someone who has incurred a parking fine while parked during work they are doing for AdvoCard. It is the responsibility of the member of staff and volunteer to make sure that they park legally at all times. Volunteers who park outside the AdvoCard office on Leith Walk will be reminded that it is a maximum of 1 hour before they need to move their car on.

Insurance

It is currently assumed that any damage to a volunteers car caused while conducting AdvoCard business would still be covered by their own insurance policy. However volunteers who use their cars in their volunteering work would be wise to inform their insurance company about this. AdvoCard for it's part will be seeking advice from our own insurers about whether we are covered in any way to assist. This would be with the view to protecting volunteer's premium levels rising through claiming and avoiding any volunteer having to pay an excess fee. AdvoCard will endeavour to confirm these details asap.

Public Transport

Rail

AdvoCard will fully reimburse rail fares within the Lothian Region but reserves the right to negotiate when travel cost become prohibitive to AdvoCard for example through frequency of travel.

With regard to rail travel out with Lothian AdvoCard reserves the right to cap the amount we reimburse especially when this related to volunteer travel of a volunteer who lives out with the Lothians. However re travel relating to AdvoCard business we pledge to fully reimburse the volunteer as long as there has been prior approval from a staff member.

As well as reimbursement AdvoCard can advance payment to

volunteers. In the case of reimbursement or advance payment a receipt will ultimately be needed for our records.

Bus / Coach

Same as rail

Passes / Travel Cards

AdvoCard will reimburse the equivalent day return, off peak regardless of whether they use a travel card or not. In place of a receipt or ticket we will photocopy the travel card. Where people pay a cheaper fare for example for reasons of disability we will reimburse the equivalent of the concessionary fare. We rely on volunteers who are in receipt of concessionary fares to inform AdvoCard in order that we can reimburse appropriately.

Taxis

AdvoCard has a contract taxi account and we will endeavour to use this account in relation to staff and volunteer travel when a taxi is required.

Taxis can be used for various reasons but always with prior staff approval.

Where a taxi is necessary out with the jurisdiction of the contract taxi company then AdvoCard could offer full advance payment or fully reimburse taxi fares but only with prior staff approval. Receipts for non contract taxis will be necessary.

AdvoCard accepts that on rare occasions for reasons of emergency or safety volunteers may need to use a taxi without prior staff approval. In these circumstances AdvoCard requires the volunteer to inform a member of staff as soon as possible giving their reason for use.

Any tipping by volunteers cannot be reimbursed by AdvoCard. In correct use of taxis both contract or non contract cannot be tolerated and

payment will always be sought.

Accommodation Costs

AdvoCard will offer reimbursement or advance for accommodations costs incurred relating to AdvoCard business. Again only with prior staff approval. Any additional costs such as evening meals / breakfast etc should be confirmed during the prior staff approval.

Food / Subsistence

AdvoCard acknowledges that on occasion a volunteer's work with the service user will happen out with the AdvoCard office in a venue which demands the spending of money. It is expected that this will nearly always mean a cafe as opposed to a pub or a restaurant! AdvoCard will on these occasions reimburse the volunteer up to the value of £5.00 on the production of a receipt. It is also acknowledged that because service users receive free tea and coffee and biscuits when they come to the AdvoCard office then this facility should also apply to service users meeting volunteers in cafes. The sum of up to £5.00 would be expected to cover the costs for both the volunteer and the service user.

In situations where the volunteer is undertaking AdvoCard business for example attending a conference or in extended work with a service user (eg. more than 4 hours) then AdvoCard will provide advance payment or fully reimburse up to the value of £10.00. Receipts must as usual be provided.

Childcare / Carers rate

AdvoCard is committed to supporting the work of volunteers who have childcare or carer's responsibilities. AdvoCard is also aware that individuals incur differing costs when covering their childcare and caring responsibilities.

AdvoCard is unable to reflect the different charges individuals may incur but is able to offer reimbursement at a standard rate of £5.00 per hour

to all volunteers regardless of total costs or number of children. This rate will be paid to cover time spent getting to and from AdvoCard and time spent while conducting AdvoCard business.

In order to reimburse these costs we would need a written, signed "invoice" from the paid care service or person, not one raised by the volunteer themselves. This is necessary for complete financial recording. (See figure 1)

Telephones

When a volunteer uses their own home phone or personal mobile in connection with AdvoCard business AdvoCard will reimburse the cost of such calls on production of a sufficiently detailed telephone bill. It would be very helpful to AdvoCard if volunteers logged calls they make re AdvoCard business in order to compare with the bills. In circumstances where such a detailed bill is not possible AdvoCard reserves the right to negotiate reimbursement based on discussions with the volunteer. In the event that AdvoCard has sufficient doubt as to the relevance of call costs relating to AdvoCard business then AdvoCard reserves the right to reimburse. Bills should be brought to the AdvoCard office once received by the volunteer no less than quarterly.

This can include lists of calls compiled by the volunteer themselves in the case when calls do not log on the bill due to being brief or too low in cost. In these cases AdvoCard will pay at the current BT rate (or equivalent) regardless of the time of day. This includes personal mobiles. (See figure 2 for call log pro forma).

AdvoCard mobile

AdvoCard has a mobile for use by volunteers in line with any volunteering work they do. This is for reasons of convenience and to avoid volunteers incurring their own costs as well as volunteer safety.

Please contact a member of staff to check on mobile availability as well as information on appropriate use, call cost system and insurance

cover.

AdvoCard acknowledges that having only one mobile is a limited facility and therefore reserves the right to monitor the issue and return of the mobile as well as the calls made while in the volunteer's possession.

Public Phones

AdvoCard will reimburse the cost of any calls made from public phones and acknowledges that it is not possible to provide evidence of spend or a receipt. AdvoCard will ask volunteers to sign a petty cash slip.

AdvoCard assumes that the vast majority, if not all calls will be local in Edinburgh and the Lothians. Any national or international calls will inevitably be questioned and justification sought.

Miscellaneous

Any volunteer that incurs costs for stationery, printing, postage or any other costs incurred inline with their volunteering work should contact a member of staff who will be happy to reimburse on production of a receipt. Reimbursement may sometimes be partial. For example in the case of printing an estimated cost will be reimbursed as opposed to a replacement cartridge.

Cheque or cash?

AdvoCard will always endeavour to reimburse volunteers with cash but there are a number of reasons when sometimes reimbursement will need to be by cheque.

- when amount is too high. (Current limit on petty cash is £50.00)
- when posting reimbursement

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Fig 1.

(Example) "INVOICE"

I hereby certify that I, (paid carer) was employed by so and so (volunteer advocate) to care for their child / children, partner, elderly parent on Thursday, 7th October, 2002 from 2pm to 5.30pm. These times represent when I was left alone with my caring responsibility and includes travelling time of my employer. The amount I am charging which is eligible to be paid by AdvoCard is £5.00 per hour.

My name is:

My address is:

tel no:

Amount invoiced

3.5 hours @ £5.00 per hour = £17.50

signed

Date

