ButeLGBT+ Community Group: Policy

Volunteer expenses policy

Document owner: Treasurer ·

Approval: Committee ·

Review: Annually

1. **Purpose**

The group aims to ensure that no volunteer is financially disadvantaged as a result of carrying out agreed volunteering activities. Reimbursing reasonable, actual expenses helps make participation accessible regardless of a person's financial circumstances.

This approach follows SCVO guidance on volunteer management and reimbursement of out-of-pocket expenses. https://www.scvo.info/support-services-2/volunteering-support/

2. **Scope**

This policy applies to all volunteers, committee members and office-holders who incur expenses while undertaking authorised activities on behalf of the group.

Expenses are reimbursement of costs incurred, not payment for volunteering time. Exceptional circumstances and avoidance of financial disadvantage or impoverishment should be the main focus for decisions.

3. **Eligible expenses**

Subject to available funds and the approval process, the group may reimburse:

Travel: reasonable public transport fares, ferry fares, necessary taxis *where alternatives are unavailable or unsuitable*, and mileage for approved use of a private vehicle.

As an island based organisation, it may sometimes be necessary to pay for accommodation for volunteers. This will only be provided when the duties of the volunteer fall out with the times of public transport alternatives. For example, when the duties extend beyond the times of the ferry and connecting public transport. unless there are exceptional reasonable extenuating circumstances. (eg if the volunteer became unwell during the course of their duties, and was unable to leave; or in the event of cancellation of ferries, we would arrange suitable accommodation for one night)

Food and refreshments: reasonable costs when travel or an authorised activity makes these necessary, within any agreed budget decided at an AGM or EGM.

Accessibility and inclusion: reasonable additional costs associated with disability access or enabling participation.

Caring responsibilities: *agreed* childcare or other caring costs directly arising from an authorised volunteering activity. These should be limited to pre-planned care where no alternative representative or volunteer is available.

Training: approved training, registration and associated travel costs agreed in advance. In preference all should be booked directly by the treasurer.

Materials and equipment: necessary supplies purchased for an agreed group activity.

Communication: reasonable postage, telephone or internet costs specifically incurred on the group's behalf, and agreed in advance of payment.

For an island-based group, necessary ferry travel, additional island transport and reasonable accommodation for approved mainland meetings or training may be eligible.

4. **Approval and spending limits**

Routine expenditure must be agreed in advance wherever possible by the committee.

The committee will approve an annual expenses budget and any spending limits.

Volunteers must seek approval before committing the group to significant or unusual expenditure.

No volunteer may approve their own claim.

The Treasurer may process claims that comply with the policy and approved budget.

Claims outside the agreed budget must be referred to the committee or an authorised alternative approver.

The committee should set realistic limits based on its funding, rather than introducing limits so low that volunteers cannot participate.

5. **How to claim**

Volunteers should submit an expenses form / written request to the Treasurer, including:

- Their name and payment details, submitted securely in person or by email
- The date and purpose of the expenditure.
- The amount claimed and an itemised breakdown.
- Receipts or other appropriate evidence of expenditure (eg confirmation emails)
- Evidence of prior approval where required.

Claims should normally be submitted within three months. Late claims may be considered where there is a reasonable explanation. In the case of delayed requests, if finances no longer permit, payment may be declined.

Where a receipt is genuinely unavailable, the Treasurer may accept an alternative written record and explanation, subject to financial controls and funder requirements.

6. **Payment and financial controls**

The Treasurer will check claims for accuracy, eligibility, supporting evidence and budget availability.

Approved claims should normally be reimbursed within 30 days.

A second authorised committee member should approve payments where practicable.

Claims made by the Treasurer must be approved by another authorised person.

Claims made by the Chair must be approved by another committee member who is not the claimant.

All payments must be recorded in the group's financial records.

The group will not routinely provide flat-rate expense payments unrelated to actual expenditure. It will distinguish genuine reimbursement from remuneration and seek appropriate advice if arrangements are unclear.

https://scvo.scot/support/running-your-organisation/volunteers

https://www.gov.uk/guidance/how-to-manage-your-charitys-volunteers

7. **Confidentiality and inclusion**

Expense claims will be handled discreetly. Financial information will only be available to people who need it for financial administration, oversight or legal compliance.

No volunteer should be required to explain their personal finances or justify why they need reimbursement beyond providing the information reasonably necessary to assess the claim.

Where a volunteer cannot afford to pay costs upfront, they may request advance purchase by the group or an agreed advance against anticipated expenditure, with appropriate financial controls.

8. **Disputes and exceptions**

If a claim is refused or reduced, the Treasurer will explain the reason. The volunteer may ask for a review by the committee, excluding anyone directly involved in the dispute.

The group will not penalise a volunteer for asking about expenses or challenging a decision respectfully