

Scouts 
South London
Greater London South County Scout Council
Volunteer Expenses Policy

A - Expense policy

This policy is designed to cover reimbursement of out-of-pocket expenditure incurred by any member of the county carrying out activities on behalf of the South London Scouts (the county).

The policy is based on the broad principle that the County - which is funded primarily by its members - will reimburse substantiated reasonable claims for out-of-pocket costs that a reasonable person would incur, having due regard for their role and that no one on our team or any of our project's teams will obtain a benefit from expenses payments.

Expense payments will be a reimbursement of actual out-of-pocket expenditure, which are reasonable, within our framework, and are incurred wholly, exclusively, and necessarily to carry out their county role and in relation to the task agreed with the county lead volunteer or county leadership team.

It is the responsibility of volunteers to ensure that they use the most cost-effective method of delivering their responsibilities.

In view of the current economic climate, it has been necessary to re-evaluate the policies, procedures, and criteria for the payment of expenses in the county. The Trustees believe strongly that members should not be out of pocket when engaged in activities on behalf of South London Scouts. However, in an age where donations and legacies are harder to obtain the Trustees feel they need to be prudent with the funds they administer.

We have therefore reviewed our recent conventions and developed a number of guidelines, which when followed will enable us to control our budget and ultimately our members money effectively.

Substantiated claims will be reimbursed subject to the maximum entitlements outlined below. All requests for reimbursement must state the meeting, event, activity, project, or other information that substantiates the validity of the claim.

Typically, this will relate to activities such as:

- Running county level section programme, events, trips, expeditions, camps and activities
- Administration costs such as stationery, postage and telephone calls
- Learning and development in relation to county appointments
- Certain travel
- Expenses relating to your role within the county

It is expected that claims could be made by members of the wider county team, authorised to make a claim by a budget holder.

Major items of expenditure should, wherever possible, be invoiced to the county and sent directly to the budget holder for approval and then submitted to the Treasurer for direct payment.

Claims must follow the following rules:

- An expense claim must be covered by an approved budget and that budget must not be overspent. It is the responsibility of the budget holder to ensure that costs remain within the agreed budget. Surprise expense claims that haven't been discussed may be rejected
- Authority to incur costs must have been agreed with the relevant budget holder prior to any costs being incurred
- All expense claims must be made using our 'official' claim form and must be signed by the claimant and approved by the relevant budget holder
- All expense claims must be supported by ORIGINAL receipts, invoices or similar for each item of expenditure subject to certain exceptions relating to travel expenses. Note that invoices or receipts should give a full description of goods/services supplied and the date of supply
- Any invoices / receipts submitted to the Treasurer (after approval by the budget holder) must be in the name of the claimant or the county and not in the names of third parties
- All claims should be made within 8 weeks of the expenditure. Claims submitted after this period will not be settled

Expenses are not to be treated as being in lieu of payment, but for reimbursing out of pocket expenses incurred as part of your voluntary role. You should make reasonable endeavours to keep spending to an absolute minimum and where possible, look for cheaper alternatives in order to help your project, event, activity, meeting or trip remain within the agreed budget.

Claims will be settled as promptly as possible once the full approved documentation is received by the Treasurer.

Some people may feel that they do not need or even should not be offered expenses payments. However, ensuring everyone claims expenses helps us to determine the full cost of running the county over the year. This helps us forecast and budget for the future. If you really don't want to have your expenses reimbursed it is possible to donate these unclaimed expenses back to the county along with gift aid.

B - Expense that are accepted and payment framework:

Our process of reimbursing expenses is based on a single, simple principle: we only reimburse actual out-of-pocket expenses. This means that team members need to submit receipts that show what they have had to spend as a volunteer that they otherwise wouldn't have.

- Expenses incurred whilst on county business
- Activities related to county level meetings, events and the programme
- Administration costs
- Telephone costs *
- Travel generally by public transport *

Note: The annual total of these categories will reflect the likely annual cost of running the county. It is therefore essential that an annual budget is collated and considered by the county board of trustees prior to setting the county annual membership fee.

*** Telephone costs**

Claims for phone calls must be approved in principle by the budget holder in advance. If a member of the county already has a telephone plan and uses some of the included minutes in the course of their volunteering, but doesn't exceed those minutes, the volunteer has incurred no additional expense so there is nothing to reimburse. If the included minutes are exceeded and an additional cost is incurred by the volunteer, there is clearly a cost which should be reimbursed.

*** Travel**

Public transport

It is reasonable for us to expect you to travel by the cheapest form of public transport. If you are using an Oyster Card, similar pre-pay travel card or your debt card, you will need to provide a receipt from a travel centre or a screen shot of the payment from your account.

Before undertaking journeys by car, other means of transport should be considered. The time available for the journey; the carriage of materials/equipment; the number of members undertaking the journey; the practicality of other means of transport and the relative costs are all factors to be borne in mind.

Travel by personal vehicle

We understand that for general traveling it is convenient to jump in your own car to attend meetings, but at a per mile cost it can cost the event/project/county (and ultimately young people), a huge amount of money when compared to the alternatives. You may still use your own vehicle, but please be mindful of the cost to the county.

We are guided by the HMRC approved mileage allowance payment rates for the reimbursement of driving expenses. These are the maximum allowable payments free of tax and national insurance contributions.

These approved rates do not place an obligation on us to reimburse expenses at those rates. They are simply the amount a volunteer can be reimbursed before the payments are liable for tax.

As of 1 April 2023, our approved mileage allowance payments are:

Cars: per monthly claim

- 40p per mile for your first 30 miles (per year)
- 30p per mile for your next 30 miles (per year)
- 20p per mile for all your miles there after (per year)

Motorcycles: per monthly claim

- 20p per mile for your first 30 miles (per year)
- 10p per mile for all your miles there after (per year)

Bicycles

- We do not pay mileage for bicycles.

Passenger payments

HMRC also states that volunteers can also claim an additional 5p per mile for each passenger they carry in relation to their volunteering role. This is paid at the discretion of the budget holder, and we are under no obligation to make this payment.

Any transport claim over £75 need to be pre-approved by your team leader before your journey.

Parking fines or penalties

Parking fines or penalties will not be reimbursed unless there are exceptional circumstances, and this is at the discretion of the County Lead Volunteer and County Treasure. Under no circumstances will speeding or any other form of traffic violation penalty or fine be reimbursed.

Parking

We ask that where possible you park in places that are free. Essential car parking charges will be refunded provided you obtain a receipt.

Rail

When booking and purchasing long distance tickets the most cost-effective options should be considered. Train travel should always be in standard class unless there are exceptional circumstances that warrant first class travel. This includes web bookings and tick office purchases. Please book as early in advance as possible as leave booking trains until the last minute will cost more. Travelling off-peak, where possible, will also usually result in price savings.

If a rail journey is cancelled or delayed by enough time to allow a 'delay repay' cash payment from the rail operator, this should be considered, and an expense claim submitted for the balance of an out-of-pocket claim.

Travel private hire

Occasionally it may be necessary to use a 'hire car' service, this is particularly if you have a mobility issue, there is disruption on the public transport network, or you have the need to transport equipment (this doesn't include your personal kit).

Black cabs are for dire emergency use only. If you need a taxi transfer from a train station or airport, please pre-book this using a minicab or transfer company, or use a ride-hailing app like Uber or Lyft for the best rates. Please ensure you reach-out to colleagues for lifts before spending money on taxis and at all times try to travel with others.

When private hire is used as a 'convenient alternative' to rail travel we will only refund up to the nearest applicable advance train ticket and public transport fares. As calculated by the County Finance Team. Please contact the team for further guidance.

Where it is in the interest of efficiency or value for money (i.e. groups travelling together) taxis may be used and the fares claimed. Claims must be supported by receipts.

Air travel

If it is more cost efficient to do so, air travel may be considered. Prior approval from your budget holder must be sought. Budget airlines should be used in preference to full-fare airlines where there is a choice of carriers. First class air travel should never be used for county purposes.

Airport collections

Please DO NOT park in short-stay car parks as these have the most expensive rates. Most airports offer up to 4 hours free parking in long-stay car parks, where there is a free shuttle bus to the terminal, typically taking less than 10 minutes.

Alternatively, if simply making a quick pick-up (i.e. you know your passenger has landed and cleared customs), head to the DEPARTURES drop-off area where you can stop and collect them, free of charge or at a low cost, so long as they're there and ready and waiting for you.

Catering

Where possible, please endeavour to self-cater alongside your colleagues whilst on county events, trips, meetings, and activities. This has enormous cost-savings for the county and provides great team-bonding opportunities. Project teams taking selfies in restaurants has previously attracted lots of criticism from the wider county membership.

If there is no alternative, local independent local restaurants are often very good value. Please ensure you remain under the policy threshold and ask the waiting staff to keep alcoholic drinks on a separate bill (as these are at your own expense).

Meals and refreshments

We will refund normal meals (breakfast, lunch, dinner), at normal mealtimes when you are away from home on County business. This does not include ad-hoc refreshments unless these comprise a legitimate meeting expense.

Breakfast

The cost of breakfast can be claimed when county business requires for you to leave home before 7am.

Lunch

The cost of lunches purchased will be reimbursed when on county business for a period of 5 hours or more in a single day.

Dinner

When meals are not included in the cost of accommodation or if you are on county business that means that you will not return home before 7pm, you will be reimbursed for cost of an evening meal including non-acholic beverages.

All claims must be supported by detailed receipts.

Where a hotel booking includes breakfast, lunch, or dinner as part of the agreed rate, you should try to avail of this where possible and not claim for meals additionally.

Team meals

Only budget holders have the authority to incur costs relating to team meals. If you are not a budget holder, prior approval from your Budget holder (normally the team leader), must be obtained. Team meals must meet the standard rates detailed in this policy document.

Whilst occasionally circumstances may dictate that these prices are exceeded, substantially higher costs will be challenged, and maximum allowances paid.

Per-person meals allowance, for all teams, projects, and budgets

- Breakfast £ 8.00
- Lunch £10.00
- Dinner £25.00

Meal allowances represent a limit rather than a suggested level of expenditure and they should be applied individually to each meal rather than aggregated to pay for one more expensive meal.

Overnight accommodation including hotels

When required, accommodation with 'en-suite' facilities in up to three-star hotels is appropriate. A VAT receipt is required.

As with meal allowances, the amounts described in this policy document are intended to be upper limits rather than a suggested level of expenditure. Therefore, if it is possible to book appropriate accommodation at a lesser amount, then this ought to be done.

Computers and IT devices

We are now in an age where it is unusual for people not to own their own PC, laptop, tablet or mobile telephone. It is therefore the trustees' intentions not to fund the purchase of these unless circumstances are such that they are both 1) necessary, and 2) used exclusively for South London scouting. In the rare circumstances where South London Scouts might provide equipment such as mentioned above it must be remembered that it remains the property of South London Scouts and must be returned when requested and certainly where a member changes role or leaves the county team or the movement.

Cash advances

Advances or floats are available to facilitate the running of events and for similar circumstances. Requests for floats must be approved by the budget holder before they are submitted to the County Treasurer for payment. Advances and floats must be cleared within one week of return or date of the event.

A complete expenditure with receipts where available must be submitted to the County Treasurer along with any remaining funds within 4 weeks after the event.

Claims relating to major projects

Such claims will be honoured subject to the requirements outlined in section **A** above.

Personal learning and development costs

A request to attend any external training, learning or personal development along with the costs relating to the learning must be agreed with the budget holder and submitted to the County Volunteer Development Team Leader before a commitment is made to any third parties and any training is booked.

Other internal learning and development relating to a county role will be honoured as section **A** above.

General expenses

Each respective Team Leader has the standing authority to purchase items of small value for the day-to-day activities of their team from their agreed annual or project budget without obtaining additional approval to a maximum of £50 per claim. This budget is the responsibility of the Team Leader who, should submit an expenses claim form together with VAT receipts. This fund should not be used to purchase equipment or fund trips, camps, etc.

Occasionally, it is likely that other members of a team may need to spend small sums of money on items such as consumables, postage, etc. Providing the total expense is less than £25, no prior approval is required from the Team Leader. However, an expenses form must be completed and submitted for approval and payment, then overseen by the Team Leader.

Equipment and services

Larger expenditure, such as the purchase of equipment or services, must be approved by the County Trustee Board prior to the expenditure. Under normal circumstances, prior agreement at a County Finance Sub-Committee is needed and recorded in the minutes. In exceptional circumstances, in the case of essential or replacement equipment, approval can be obtained via email with agreement from the County Chair and County Lead Volunteer (and tabled at the next board meeting).

Regular County expenses

The County Treasurer has the authority to raise payments for the payment of the following items without having to request approval at a County Trustee Board:

- Annual insurance renewals
- Payment of any badge / scarf's invoices
- Annual membership fees payable to The Scout Association
- Any other regular day to day County expenditure

County camps and organised trips and events

It is intended that any organised County camps, trips, or other events are costed, and a full budget supplied to the county Finance Sub-committee for approval and presentation to the County Trustee Board. All County camps, trips, or other events must be self-funded and cost neutral. Each County camp, trip, or other event should be managed by a nominated organiser who must assess whether this is likely, or if a deposit, support or a "float" is needed.

Any such support requires consideration and approval by the County Trustee Board ahead of the event organisation stages and before any third-party services are engaged. The trustee's approval (or otherwise) must be recorded in the meetings minutes.

Items for direct payment should be invoiced to the County (South London Scouts) and sent to the Treasurer with the approval summary sheet for payment.

The event organiser must make a judgement about how much to charge the team members involved with the activity and discuss it with them fully at the planning stage. We acknowledge that their presence is vital to enable the camp, trip, or event to happen. But all volunteers should contribute when there is some personal tangible benefit through attending (e.g. theatre, foreign trip etc.)

Standard expense rates

The annual allowance for stationery and office consumables is £30.00 per person.

Where you cannot claim

There are very few circumstances where the county would not accept a valid claim for expenses when carrying out work on its behalf. However, it is not possible to claim for the charged fee at an event as a participant or staff member e.g. attendance at Gilwell Reunion or county events as a participant etc.

An expense claim cannot be made for travel to and from our conferences, when one is held.

Uncontrolled when printed:

When printed, this document cannot be guaranteed to have the current information and should be used with caution. This document is marked "uncontrolled" and the user is responsible for determining if the printed version is the current active version. To find the most updated version, please visit our county team pages at www.southlondonscouts.org.uk

<p>This policy is effective from 1 June 2023 Approved by Trustees 23rd May 2023 Next review May 2025</p>
