



# Expenses Claim Procedure



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## 1. Introduction

GreenHouse Mentoring (GHM) has been operating since 2002.

This document explains GHM's Expense Claim Procedure.

## 2. Applicability

This policy applies to all GHM Staff and Volunteers.

## 3. Definitions

Within this document, the following definitions are understood:

**Volunteers** any person currently volunteering with GHM with a signed Volunteer Agreement;

**Service User** any young person who has or is receiving service from GHM;

**Staff** any member of the GHM Team with a formal written and signed contract;

**Buddy** any person who agrees to assist a volunteer by ensuring that mentoring sessions are completed on time and safely

**External Persons** any other person or organisation that has had or is having contact with GHM and does not fall into the above three categories.

## 4. Policy Authority

This document is approved by the GreenHouse Mentoring Manager.

Written By	Version/ Date	Comments
Richard Nestor	14/06/2012	Previous Issue
Ian Pirks	10/10/2013	Updated to standard document format
Ian Pirks	11/06/2014	Change to policy on what can be expensed

## 5. Principles of Policy

The following principles will apply within GHM:

- ◆ In all cases GreenHouse Mentoring staff and volunteers will work within the GHM Vision, Mission & Values statement.
- ◆ Volunteers may claim valid expenses incurred as part of their agreed volunteering activities with GreenHouse Mentoring.

## 6. Policy Procedure

### 6.1 Introduction

See \\GHMserver\Shared \GHM Forms for all GHM Forms.

Volunteers may claim expenses incurred as part of their agreed volunteering activities with GreenHouse Mentoring. This policy initially came into force on 1st April 2012, and sets out the details about the:

- ◆ Definitions
- ◆ Validity of claims
- ◆ Printing and Photocopying
- ◆ Telephone calls
- ◆ Requirements for making a claim
- ◆ How to claim

### 6.2 Definitions

GHM Expenses can only be claimed and reimbursed once the potential volunteer becomes a **fully vetted GHM volunteer**. To be classified as a fully vetted GHM volunteer, the individual must:

- ◆ Complete the relevant training sessions (in person or via distance learning);
- ◆ Provide two acceptable character references;
- ◆ Have an acceptable GHM DBS disclosure;
- ◆ Have received and read carefully a GHM volunteer pack & ID card and returned the following:
  - Signed Confidentiality Agreement
  - Completed Emergency Medical Form
  - Completed Volunteer Agreement
  - Completed Safe 2 Grow Declaration form
  - Completed the GHM Policy Acceptance Matrix

However, a potential volunteer who has a disability and requires paid-for transportation to attend GHM activities can claim and receive reimbursement in line with this document.

### 6.3 Validity of claims

The following is a list of reasonable expenses for which GHM volunteers may be reimbursed. These may include:

- ◆ Reasonable travel expenses (see 6.3.2) (via car, bus, *taxi*, train) to The GreenHouse for training, meetings or volunteering work;
- ◆ Reasonable travel expenses (via car, bus, *taxi*, train) to a mentoring relationship meeting at a school or lone working venue;

Any other expenses e.g. refreshments, resources, external activities will not normally be refundable. In a special case then an application to the GHM Manager may be made and special dispensation granted.

#### 6.3.2 Reasonable Travel expenses

- I. GHM Volunteers may claim the cost of reasonable valid travel expenses incurred by public transport, i.e. bus or train, when travelling from their home, or workplace, or education establishment, to their mentoring relationship. Volunteers should purchase and claim the cost of a standard return ticket.
- II. GHM Volunteers with disabilities that necessitate special transport arrangements should be reimbursed for the actual cost of their travel.
- III. Taxis are only to be used by GHM volunteers on written approval of the GHM Manager.
- IV. Where a private vehicle is used whilst performing a recognised GHM role and mileage is claimed, volunteers may claim up to maximum of 15 miles per week per volunteer role, from their home, or workplace, or college, to the mentoring meeting point, whichever is the shortest distance.

If this causes serious difficulties for any GHM volunteer, it may be possible for a compromise amount to be decided at the discretion of the GHM Manager and within budgetary constraints. Such individual arrangements may be subject to alteration and should not be seen as the norm.

### 6.4 Printing and Photocopying

Whenever possible, photocopying should be done at The GreenHouse. If you feel that it is not practical in a particular case, please contact the GHM Administrator to discuss the alternatives.

## 6.5 Telephone calls

If you need to use your telephone (landline or mobile) for GHM volunteering work the cost can be reimbursed, provided that:

- ◆ The principle of these calls being reimbursed is agreed in advance with the GHM Manager;
- ◆ The calls were made as part of your GHM volunteering work;
- ◆ An itemised bill is submitted with your expense claim with GHM calls clearly marked with the name of the receiver and the purpose of the call.

## 6.6 Requirements for making a claim

In order for expense claims to be reimbursed, please ensure that:

- ◆ The expense was incurred as part of your GHM volunteering activities;
- ◆ Valid receipts are attached for all claims except mileage claims;
- ◆ GHM has copies of your current Insurance documents, MOT and driving licence for mileage claims;
- ◆ It is important to note that expenses will only be reimbursed within the financial quarter in which they are incurred (see below):

### Expenses claim quarters:-

*Quarter One – 1st April to 30th June (current year)*

*Quarter Two – 1st July to 30th Sept (current year)*

*Quarter Three – 1st Oct to 31st Dec (current year)*

*Quarter Four – 1st Jan to 31st March (subsequent year)*

Volunteers are to ensure that their expense claims are received by a GreenHouse Mentoring staff member (who will sign the claim to acknowledge receipt) on or before the end of the relevant financial quarter. Where it is known that an expense will be incurred during the quarter but will be submitted after the expenses claims deadline, the volunteer should inform the GHM Administrator.

Claims can be either presented in person or sent by post. When posting, volunteers are strongly advised to do the following:

- ◆ make a full copy of all expense claims and receipts;
- ◆ post the claim;
- ◆ inform the GHM Administrator immediately by email or telephone of:
  - postage date;
  - claim value.

The volunteer will then be contacted if the posted claim is not received by the GHM Administrator within 14 days of the end of the quarter. In the event of a missing/lost claim, reimbursement can only be made if GHM has been advised of the pending claim within the relevant quarter and on receipt of the full copies of both the claims and receipts.

Expense claims are typically reimbursed at the end of each financial quarter. Please contact the GreenHouse if you have not received expense reimbursement within 14 days of end of the quarter.

## 6.7 How to claim

### 6.7.1 For all claims (excluding mileage claims)

Please complete the Volunteer Expense Claim Form as follows:

- ◆ Date expense occurred;
  - ◆ Amount [eg £6.05];
  - ◆ Paid to [eg Arriva];
  - ◆ GHM Role (where applicable);
  - ◆ Description [e.g. bus to mentoring meeting at ..... ].
- a. Repeat this for each expense.
  - b. Calculate the total.
  - c. Add your name clearly, and the date you are submitting the completed form.
  - d. Attach all receipts.
  - e. Submit your claim in an envelope marked 'GHM Expense claims' to The GreenHouse before the end of the relevant financial quarter.

### 6.7.2 For mileage claims:

- a. Take mileage readings in your car to be able to give distances.
- b. On the GHM Mileage Claim Form complete the fields:
  - ◆ Date travel occurred;
  - ◆ Destination [e.g. From GreenHouse to Putteridge High School];
  - ◆ GHM Role;
  - ◆ Purpose [e.g. mentoring meeting] ;
  - ◆ Miles as recorded by the car odometer [to nearest 0.5 of a mile].
- c. Repeat this for each trip.
- d. Calculate the total number of miles (reimbursed at 45p per mile).
- e. Add your name clearly and the date you are submitting the completed form.
- f. If posting, submit your claim in an envelope marked 'GHM Expense claims' to The GreenHouse before the end of the relevant financial quarter.

**Example of completed Expense Claim form**

GreenHouse Mentoring					
Volunteer Expense Claim Form for all expenses (excluding mileage claims)					
Name: A.Volunteer					
Date submitted:		11-Jun-14			
Date	Amount	Details of expenses incurred (please specify type)	Paid to	Purpose	GHM Volunteering role
16/05/2014	£ 32.80	Train fare to London	The Trainline	Representing GHM at Conference - agreed in advance by GHM Manager	GHM Mentor
25/05/2014	£ 3.00	Bus Ticket	Arriva	Travel to/from GH for Volunteering	Group Mentoring Skills
27/05/2014	£ 15.95	Phone Calls	BT	Supervision Calls - agreed in advance by GHM Manager	GHM Supervisor
30/05/2014	£ 3.00	Bus Ticket	Arriva	Travel to/from GH for Volunteering	GHM Mentor
TOTAL		£ 54.75	Approved by (office use only)		
			Receipt acknowledged by (office only)		

Please complete the form and submit with all receipts by the claim deadline to: GreenHouse Mentoring 16-22 St Thomas' Road Luton LU2 7UY  
Expense claims posted to the Greenhouse are normally paid within one month of receipt. Please contact the Greenhouse if expenses have not been received.

**Example of completed Mileage Claim form**

GreenHouse Mentoring						
Expense claims form for mileage claims						
Name: A.Volunteer						
Date Submitted:		11 June 2014				
Date	Details of Journey			Miles travelled	Purpose	GHM Volunteering role
	From	To	Return destination			
04/04/2014	LU2 7UY	LU1 (Town)	LU2 7UY	6.5	Travel to Town to meet Mentee	GHM Mentor
13/04/2014	LU2 7UY	LU1 (Town)	LU2 7UY	6.5	Travel to Town to meet Mentee	GHM Mentor
03/05/2014	LU2 7UY	LU1 (Town)	LU2 7UY	6.5	Travel to Town to meet Mentee	GHM Mentor
10/05/2014	LU2 7UY	LU1 (Town)	LU2 7UY	6.5	Travel to Town to meet Mentee	GHM Mentor
				Total mileage	26	Miles
				Claim Amount (office only)		
				Receipt acknowledged by (office only)		

Please complete the form and submit with all your receipts by the expenses claims deadline to: GHM Greenhouse Mentoring 16-22 St Thomas' Road Stopsley Luton LU2 7UY  
Expense claims posted to the Greenhouse are normally paid within one month of receipt. Please contact the GreenHouse if expenses have not been received.

**7. Frequently Asked Questions**

- Q1. Why have the Expense Claim rules been changed?
- A. The Government's austerity measures have negatively impacted GreenHouse Mentoring operating funds. We have therefore had to review our financial circumstances in order to continue to provide our services to the young people in Luton.



Q2. What are “reasonable” travel expenses?

A. Volunteers should use the cheapest available method to travel to/from the GreenHouse or to volunteering venues depending on their ability to access to cars, buses or trains.

It is important to note that Taxis are no longer classed as a reasonable method of transportation **unless** the volunteer has previously provided a suitable reason for usage (in written form) to the GHM Administrator or GHM Manager. This reason should explain why a taxi is a reasonable method of transportation in their particular instance (e.g. the volunteer is unable to use public transport due to physical disabilities).

In line with standard GreenHouse Mentoring practices, all claims must be supported by receipts and submitted as outlined in this Expenses Claim procedure.

Q3. I am both a Mentor & Skill Sessions helper and use my car to travel more than 15 miles per week to fulfil both roles. How much mileage can I claim for?

A. Volunteers may claim up to a **maximum of 15 miles per week per volunteer role**. For example, mileages relating to mentoring activities and skills sessions volunteering are to be recorded separately as you can claim up to a maximum of 15 miles per week for each role.

Where the mileage incurred due any given single role **exceeds** 15 miles per week, a volunteer will not be reimbursed for any mileage over the maximum **unless** an agreement/compromise has been reached with the GHM Manager in advance.

Q4. Is there a limit to the re-imbusement of telephone calls or printing incurred as part GreenHouse Mentoring volunteering activities?

A. The principle of these calls/ printing being reimbursed must be agreed in advance with the GHM Manager. Yes there is a limit. It is appreciated that each GreenHouse Mentoring volunteer role will generate varying amounts of expenses. Should reasonable expenses be incurred through telephone calls and printing which exceed £7.50 per week then a further discussion with the GHM Manager needs to be arranged immediately.

Any telephone or mobile phone expenses are to be accompanied by an itemised bill to enable GreenHouse Mentoring to determine the correct level of re-imbusement.

Printing re-imbusement prices are as follows:

A4 Printing (per sheet)	Black & White	Colour
Single-sided	4 pence	6 pence
Double sided	6 pence	11 pence

- Q5. It is my mentee's birthday so I would like to buy them a small gift or take them out for the day. Can I claim for any expenses incurred?
- A. No, unless there is a very special case, this cannot be refunded. Any cases must be made to the GHM Manager.
- Q6. Why does GreenHouse Mentoring require valid copies of my MOT certificates, Car Insurance documents and Driving Licence if I claim mileage expenses?
- A. These documents ensure that both you and your vehicle are legally safe to drive and are fully insured whilst conducting GreenHouse Mentoring volunteering activities (a condition of our liability insurance). In addition, we advise that you ensure that your car insurance policy covers usage during volunteer activities (which is considered business use by insurers).
- Please bear in mind that your insurer may charge an extra premium, impose additional terms and conditions - such as a higher policy excess - or require cover to be extended to business use should your current policy require amendment. GreenHouse Mentoring is not liable for any premium charges resulting from required alterations to volunteer car insurance policies.
- Q7. I am in full-time employment/attend university and have significant personal commitments so I don't always have the time to check the expenses claims deadline. Can I be reminded please?
- A. Yes, in line with previous good practices, reminders will be sent to all GreenHouse Mentoring volunteers about the expenses claims deadlines. The reminders are announced in the monthly GHM newsletters; your supervisor will remind you as part of their regular contact with you & text/e-mail message reminders will also be sent to you. There is a reminder poster on the GreenHouse Mentoring café notice board. It is in your best

interest to read any communications from GreenHouse Mentoring as it is your responsibility to submit your claims before the deadlines.

Q8. I live in Stopsley and I work in Hatfield. I use my car to travel to and from work. On the days I travel straight from work to meet with my mentee in Luton town centre, can I claim my mileage expenses from Hatfield to Luton town centre?

A. No. GreenHouse Mentoring does not consider it reasonable for volunteers to claim mileage expenses over and above the 15 mile per role per week limit in this particular instance as the volunteer would have had to make the return journey from Hatfield to Luton in any case.

GreenHouse Mentoring would typically reimburse the mileage from the volunteer's home to Luton Town Centre **unless** the volunteer can otherwise reach a compromise with the GHM Manager.

Q9. How do I obtain my expenses once I submit a claim?

A. All expense claims will be reimbursed at or just after the end of quarter as a general rule. Please note: Expense claims over £20 will be reimbursed via cheque or BACS transfer. BACS forms will be available from the GHM office (see attached).

## 8. Monitoring, Evaluation & Reporting

All expenses requested and granted are entered into a spreadsheet by GHM Administration.

Income and Expenditure is reviewed on a monthly basis by the GHM Manager.



## 9. Policy Review

Next policy review due before: June 2017  
Policy last reviewed on: 11/06/2014

**Approved by:**

Sue Pirks .....

(GreenHouse Mentoring Manager)

Date .....

Blank Expense Claim form

# GreenHouse Mentoring



Volunteer Expense Claim Form for all expenses (excluding mileage claims)

Name:

Date submitted:

Date	Amount	Details of expenses incurred (please specify type)	Paid to	Purpose	GHM Volunteering role

TOTAL

Approved by (office use only)

Receipt acknowledged by (office only)

Please complete the form and submit with all receipts by the claim deadline to: GreenHouse Mentoring 16-22 St Thomas' Road Luton LU2 7UY  
Expense claims posted to the Greenhouse are normally paid within one month of receipt. Please contact the Greenhouse if expenses have not been received.





Stopsley Baptist Church  
St Thomas' Road  
Luton  
Bedfordshire LU2 7XP

T: 01582 727352  
E: office@stopsley.net  
www.stopsley.net

### BANK ACCOUNT DETAILS - PRIVATE and CONFIDENTIAL

VOLUNTEER FULL NAME and ADDRESS:

NATIONAL INSURANCE NUMBER: **NOT APPLICABLE**

BANK DETAILS EFFECTIVE FROM:

NAME and BRANCH OF BANK/BUILDING SOCIETY:

ACCOUNT NAME:

BANK ACCOUNT NUMBER:

BANK SORT CODE:

BUILDING SOCIETY ROLL NUMBER:  
(if applicable)

SIGNED:

DATE:

For Office Use Only

P45

ENCLOSED / TO FOLLOW / NOT  
APPLICABLE

P46

ENCLOSED / TO FOLLOW / NOT  
APPLICABLE