

Volunteer Mileage Expenses Policy

Purpose of the Policy

The Volunteer Mileage Expenses Policy (the Policy) clearly sets out the volunteer mileage expenses system, how it operates and when it will be reviewed.

Policy aims

Through this Policy, Westonbirt aims to:

- be fair and equal to volunteers in recognising the costs associated with their volunteering commitment
- safeguard volunteer activities for the future
- meet best practice in volunteer management
- provide clear guidelines to enable volunteers to make a claim if they so wish
- ensure a robust and sustainable mileage reimbursement system

What is the mileage expenses system?

Westonbirt makes a contribution towards the cost of mileage for all its regular volunteers (as specified in section 4. *Who can make a claim?*) Claims may be made for journeys from home to Westonbirt and travel to external venues (previously authorised by staff) to undertake event activities, make scheduled visits, or to collect necessary resources.

Claiming mileage expenses is optional.

Guidelines for claiming mileage expenses

Volunteers will be expected to travel by the most economic method open to them.

1. What is the mileage rate?

- 1.1. Volunteers who complete a minimum of one hour* volunteering per day will be eligible to make a claim for that day's volunteering. The following rates are offered for a maximum return journey of 32 miles:
 - 1.1.1. cars 20p per mile (up to a maximum of £6.40 per day)
 - 1.1.2. motorcycles 13p per mile (up to a maximum of £4.16 per day)
 - 1.1.3. bicycles 10p per mile (up to a maximum of £3.20 per day)
 - 1.1.4. public transport fares (up to a maximum of £6.40p per day and accompanied by a valid receipt)
- 1.2. Car sharing is encouraged. Only the driver is eligible to claim for the journey, a passenger rate applies of 26p per mile. Where a volunteer drives to collect another volunteer from their home and they both then travel to Westonbirt in one car, the driver may claim the passenger rate for the whole return journey up to a maximum of £8.32 per day.

*Mileage expenses may be claimed for certain official volunteer related meetings that do not last the requisite one hour where volunteers are specifically asked to attend by Westonbirt staff; claims may not be submitted for personal, unauthorised, or non volunteer related visits.

2. How to make a claim

- 2.1. Mileage expenses will be reimbursed quarterly on completion of the **Westonbirt Volunteer Mileage Expenses Claim Form**; volunteers undertaking Project related tasks will be issued with an HLF Mileage Expenses Claim form.* All forms to be submitted to the Volunteer Manager.
- 2.2. Mileage expenses claims will be authorised by the Volunteer Manager, Learning and Participation Manager, and for Project claims the Project Officer. Claims will only be paid to volunteers who have signed-in using the Volunteer Attendance Book/event sign-in sheet; regular spot checks will be made to verify volunteer attendance. Volunteers travelling directly to an external venue in order to undertake tasks/events and therefore unable to sign-in to the Volunteer Attendance Book, should have their expenses claim form authorised by staff overseeing/supervising the event, before passing to the Volunteer Manager.

*Project mileage expenses are paid from the HLF grant budget and we need to record this separately for accounting purposes, therefore we need claims to be submitted on an **HLF Volunteer Mileage Expenses Claim Form**.

- 2.3. Payments will be by BACS transfer only; all volunteers wishing to claim will be asked to complete the **Volunteer Application for Payment by BACS Form**.
- 2.4. Mileage Expenses Claim forms will be processed quarterly by the Forestry Commission finance office and payments made as soon as possible after receipt of the claim form; once the claim has been authorised payment will usually be within 14 days.

3. When should claims be submitted?

- 3.1. The Forestry Commission's financial year runs from 1 April to 31 March.
- 3.2. Claims can only be submitted within the financial year that the volunteering takes place and not carried over to the following financial year*.
- 3.3. Mileage expenses claims should be submitted for each quarter's travel at the end of the quarter as specified in the table below.
- 3.4. To help process Q4 claims in time to meet the end of year deadlines they are split into two timeframes:
- 3.4.1. all expenses for Jan-7 March plus any outstanding from Q's 1-3 should reach the Volunteer Manager by 7 March
- 3.4.2. remaining claims incurred 8-27 March should reach the Volunteer Manager by 27 March
- 3.5. *Only claims for duties undertaken 28-31 March may be carried over to Q1 of the new financial year.

Quarters (based on FC financial year)	From / to	Please return your form by
Q1	1 Apr-30 Jun	7 Jul
Q2	1 Jul-30 Sep	7 Oct
Q3	1 Oct-31 Dec	7 Jan
Q4	1 Jan-7 Mar	7 Mar deadline
Q4	8 Mar-27 Mar only	27 Mar

4. Who can make a claim?

- 4.1. The mileage expenses scheme is open to regular volunteers defined as 'those who are integrally involved in day-to-day operations and activities managed by Westonbirt staff'. Those unable to claim include:
- 4.1.1. non Westonbirt volunteers involved through a partnership e.g. Bristol Drugs Project
- 4.1.2. courses for volunteers where payment is made for instruction e.g. dry stone walling course
- 4.1.3. work experience for students 14-18 years
- 4.1.4. community group volunteers under permission e.g. Cotswold wardens, BTCV, Groundworks
- 4.1.5. volunteers involved through a partnership organisation or contractor e.g. RSPB
- 4.1.6. corporate/business volunteering
- 4.1.7. those taking part in open volunteering days e.g. Spring clean
- 4.1.8. probation service
- 4.2. We reserve the right to reconsider qualification criteria as and when appropriate.

5. Reviewing the Policy

- 5.1. The Volunteer Manager, and Learning and Participation Manager will review the Policy annually. Any rises in the price of fuel over that period will be duly considered in line with budgetary constraints. The report and recommendations will be included in the end of year Arboretum Support Budget (ASB) report.

Reviewed by Cheryl Pearson, Volunteer Manager	27 March 2013
Amendment – minimum volunteer task time amended to one hour (from two hours), approved by Ben Oliver, Learning & Participation Manager	17 June 2013
Policy reviewed: quarter dates amended as above to aid end of year financial accounting.	15 April 2014
Policy reviewed: quarter dates amended to aid end of year financial accounting.	1 April 2015
Policy reviewed: end of year deadlines updated, and financial year claim period introduced in section 3. <i>When should claims be submitted</i>	24 February 2016
New budget code added, and form return dates shortened to one week after the end of each quarter.	5 July 2016
Next review date	April 2017