



Reimbursement and Gratuities Policy v1

Date of sign off and adoption: 25th November 2024

Authorising body - Committee

Review date: April 2025

Purpose

The purpose of this policy is to ensure Live Well in Branton employees and volunteers are clear about the circumstances in which they can claim repayment of expenses, accept gratuities, and the processes for doing so. We want to make sure our employees and volunteers know where they stand in these situations, and do not incur any unintended tax liability

Policy Statement

We know that staff and volunteers can incur expenses in the course of their work on behalf of Live Well in Branton. Although volunteering work is unpaid, it shouldn't cost a volunteer anything either. Employees should be reimbursed for costs associated with their employment.

Sometimes our service users want to express their gratitude to our employees and volunteers by offering gratuities. Live well in Branton employees and volunteers should not accept gratuities on a personal basis, but service users can show them the difference they are making by giving a compliment. Words are often the best and simplest way to show thanks.

Policy Application

The Contracts of Employment for Live Well in Branton's staff are hosted by North Devon Voluntary Services (NDVS). These staff should adhere to the NDVS Tips and Gratuities policy and implement Live Well in Branton's Reimbursement **and** Gratuities policy and practice, adapted from NDVS policies.

All volunteers should adhere to the Live Well in Branton's Reimbursement and Gratuities Policy and practice.

Definitions

Gratuities

Gratuities are financial contributions or purchased items to thank an employee or volunteer for their work.

Reasonable Expenses

- For employees and for the purposes of this policy, travel costs can be claimed according to NDVS policy. Volunteer travel costs can be claimed from home to the place of volunteering
- Administrative costs – phone calls, stationary, postage.
- Equipment.

If there are circumstantial barriers to volunteering, these should be raised with the Volunteer key contact.

Principles

Staff and volunteers should be reimbursed for costs incurred as a direct result of their work on behalf of Live Well in Braunton.

Staff and volunteers should not accept personal gratuities from our service users. However additional donations to help fund the operational costs of Live Well in Braunton are welcome.

If the offer is of a gratuity is financial, it can only be accepted as a donation to Live Well in Braunton.

If a gratuity is something such as a bottle of wine or some chocolates, it can be accepted on our behalf, and we will then use it to help raise funds (e.g. as a raffle prize).

Gratuities should never be accepted on a personal basis for the following reasons:

- **Client affordability**
- **Safeguarding concerns**
Encouraging personal gratuities could be considered abusive behaviour and may result in the cessation of the volunteer's activity or disciplinary proceedings against employees concerned.
- **Bringing the Organisation into disrepute**
By regularly accepting tips or gratuities there is a risk of organisations being viewed as running commercial services.

Responsibilities

Live Well in Braunton

Live Well in Braunton will reimburse all authorised expenses incurred as a direct result of staff or volunteers working on its behalf
HM Revenue and Customs sets tax free approved mileage allowances that enable us to reimburse you without the need for a self-assessment declaration. These rates apply both to employees and volunteers.

Key Contact/ Line Managers

Should ensure that employees and volunteers are aware of the principles, processes and rates and limits for both reimbursement claims and gratuities. These are outlined in the Appendices.

Employees and volunteers

Should claim reimbursement of expenses in line with the Policy in Practice section of the Appendices. If possible preauthorisation should be gained for all purchases in the case of volunteers, and for items over the value of £50.00 for employees.

Employees and volunteers should make service users aware of Live Well in Braunton's Gratuities guidance.

Appendices

Appendix 1: Policy into Practice

Reimbursement of expenses.

All expenses to employees and volunteers will be paid Monthly in arrears, and should be claimed on the form in Appendix 3

Mileage and expenses claims should be submitted the to the employee's line manager or Volunteer Coordinator by the 24th of the month. Payments will be approved within one working week.

Travel Claims

Employees and Volunteers who must use their car for Live Well in Braunton activity can claim the approved mileage rate of 45p per mile on receipt of a completed expenses form.

Employees can claim necessary mileage as per NDVS policy. Volunteers can claim necessary mileage to and from volunteering tasks to home.

Where expenses paid are above £8,500 pa HMRC will be informed by us and the person receiving the expenses may be required to complete a self-assessment tax return

Purchases

Any purchases of items made by employees or volunteers for the purposes of carrying out Live Well in Braunton's work and not already available from Live Well in Braunton can be claimed on the claim form attached to this policy with receipts of purchase.

Purchases made by employees should be pre – authorised by a Line Manager for purchases over £50. Volunteers should gain pre – authorisation from the Volunteer Coordinator.

Gratuities

All gratuities should be declared to the Employees Line Manager or volunteer Key Contact and recorded.

Items should be handed to the Line Manager or Volunteer Coordinator.

Financial contributions can be paid to Live Well in Braunton by the service user by cheque, bank transfer or in cash.

Appendix 2

Key messages for Volunteers

We know that staff and volunteers can incur expenses in the course of their work on behalf of Live Well in Braunton. Although volunteering work is unpaid, it shouldn't cost a volunteer anything either. If there are circumstantial barriers to volunteering, these should be raised with the Volunteer Coordinator.

Volunteers will be reimbursed for costs incurred as a direct result of their work on behalf of Live Well in Braunton. This includes travel from home to the place of volunteering and return, and any necessary purchases to carry out the volunteering work – preauthorised, and with receipts.

Sometimes our service users want to express their gratitude to our employees and volunteers by offering gratuities. Live Well in Braunton volunteers should not accept gratuities on a personal basis. However, financial and item donations to Live Well in Braunton are welcome.

Appendix 3

Live Well in Branton Expenses Form



Month Claiming: _____

Date: _____

Please **include receipts and parking tickets** to the expenses, we will be unable to refund if not attached. LWIB **will not refund** any parking fines or Penalty Charge Notices.

Expense description	Date dd/mm/yy	Total (£)
Total for the month		£

Date	Journey details (To and from)	Mileage	Total Cost (miles x £0.45)
Total Cost for the month			£
Total expenses claimed for the month. (Expenses + Mileage)			£

All forms to be submitted to the Volunteer Co-Ordinator **by the 24th of each month.**

The forms will then be checked and forwarded to LWIB Treasurer and Finance Department for payment.

Signed by Volunteer: _____

Approved by Volunteer Co-Ordinator: _____

Bank Details for BACS payment.

Account number: _____

Sort

Code: _____

Date: _____