

# Leader Credits & Expenses Policy

## July 2024

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## Overview

Event type	Leader Credit	Maximum Expenses
Day Events 4 hours or more	£8 OR expenses	£8*
Day Events Less than 4 hours	£4 OR expenses	£8*
Indoor climbing Beginner-friendly event in which the leader does not get to climb	£4 OR Expenses  PLUS centre entry	£8  (+ climbing centre entry)
Indoor climbing Without a beginner	£4 OR Expenses	£8
Hostel and Camping Events	£16	£100*
BIG Events BIG Events Team members	-	At Programme Manager's / Treasurer's Discretion
BIG Events day events	£8 OR Expenses	£8*

Table 0.1: Overview of Leader Credits and Expenses Policy

\*unless by prior agreement with the Programme Manager

Example expenditure includes mileage, parking, and public transport (standard class, not including third party booking fees or insurance). Expenses for essential equipment, such as maps for walking events should be discussed with the Programme Manager before purchase.

This overview is applicable to Events within and outside of the UK. Expenses relating to international travel and accommodation are not covered. Online events do not attract expenses claims or Leader Credits.

## 1. Background

OutdoorLads is reliant upon volunteer efforts to run the events which are the foundation of the organisation. We value the diversity, experience, enthusiasm, and skills that our volunteers (leaders) bring to the organisation, and their efforts are appreciated enormously.

Our key group of volunteers are our event leaders, to whom this policy applies. These are the people who are volunteering to deliver our great events – walks, cycles, hostels, camps, climbing, etc.

Volunteering is the act of giving of time for the benefit of others, without reward. It is important that there is a clear distinction here – time is given freely and without reward, but it is important that individual's financial circumstances do not prevent them from taking part in OutdoorLads as a leader. To that extent, expenses are available to be paid to volunteers to ensure that as many people as possible can be event leaders and we can benefit as an organisation from everyone's skills, experience and enthusiasm.

Individuals may also hold other roles in the organisation (such as trustee, regional co-ordinator or even be staff) but this policy is the one that applies when they are *volunteering* to lead events, just the same as any other of our event leaders (there is a separate expenses policy in place for when acting in those other roles).

For several years, OutdoorLads has had a leader credits system, where leaders receive a leader credit after their event, which can be used against either membership or paid events. Although this has historically been viewed as a "thank you" to leaders, it is actually intended as a contribution to leaders' expenses in running an event. This is an important distinction, as we are in no way employing leaders. To ensure that employment law is observed, leaders cannot be financially rewarded, but they can have their reasonable expenses reimbursed.

Over time, the understanding of the rules around leader credits and the circumstances in which they are issued has become rather "loose", and hence in light of the above, the use of leader credits is being clarified. These rules around leader credits will be necessarily more strictly applied in future.

Whilst they have been seen as a thank you to leaders, it is important that they are returned in our mindset to their actual intended use, which is as a contribution to leader expenses. We have agreement from HMRC for use of leader credits as a token contribution to the expenses a leader incurs.

## **2. Leader Credits**

Leader credits are provided to volunteer leaders as a token contribution to the expenses leaders incurred in volunteering to lead events for the organisation. Although many have commonly thought of them as a "thank you," that is not their intended purpose. It is important for them to be recognised as a contribution to expenses incurred, as under charity guidance, volunteers should not receive financial reward for providing their time.

Leader credits are awarded automatically to the main leader of an event when the attendance is completed and the event page archived, in line with the following schedule:

- Half day/evening events - £4 coupon
- Full day events - £8 coupon
- Multiple Day events - £16 coupon

Sixteen pounds is the maximum leader credit available per event, or linked series of events taking place on consecutive (or nearly consecutive) days. An example would be a week's cycle tour, presented as a series of day events but effectively the same event. Please discuss with the office in advance if this applies to an event you wish to run and is of concern.

Leader credits are not automatically provided for events outside the UK, or for events as part of BIG Events. These would need to be manually provided but at the discretion of the office team and would be in line with the parameters above.

If a leader is claiming expenses for an event, these cannot be paid in addition to receiving the leader credit, because the leader credits are issued in place of expenses. In this instance, the staff team will remove the leader credit at the time the expenses are paid.

Leader credits are provided to co-leaders where the co-leader is required under the charity's operational procedures to be in place, (or where this has been agreed in advance by the office).

In summary, the following applies to the circumstances in which co-leaders can receive leader credits:

- 2.1. For day events, where the planned and actual attendance means that more than one leader is required by the organisation's operating procedures. So if more than 20 people are on a lowland and hill walk, more than 12 on a mountain walk, etc...
- 2.2. For hostel and camping events where planned and actual attendance is more than 30 (on the overall event) unless agreed in advance with the office.
- 2.3. For volunteers providing day events on hostel and camping events, who are not the overall events leader, leader credits can be provided only where individuals would have received a credit had it been a stand alone event. For example, if they put on an additional day walk, but not for helping with washing up. In this circumstance, minimum attendance on the stand alone event would need to be five people.

Co-leader credits are issued manually and so would need to be requested by the main leader.

Many of our volunteers choose to have a further volunteer leader partner up with them to run events together, where a second leader isn't a requirement, but nice to have. We would encourage leaders to continue that if they prefer that approach and are grateful to our dedicated leaders for doing so.

However, to help us in maintaining cost controls for the organisation, unless the above requirements are met, leader credits aren't available to the co-leader. We'd suggest that you either split the available co-leader credit (just e-mail [support@outdoorlads.com](mailto:support@outdoorlads.com) once you've archived the event and we'll do that for you) or perhaps if you regularly lead together, alternate who is the main leader and who is the co-leader, so that it is shared out over time.

### **3. Using Leader Credits**

Leader Credit coupons can be used towards the cost of events or membership. You can find your coupons by going to "My account" and selecting the "Coupons" tab.

You can use these at checkout when purchasing events. Multiple coupons can be used, up to the total value of the items in your basket.

You can now use Leader Credit coupons to pay for membership by direct debit. You'll need to request this by the 15th of the month BEFORE your direct debit is taken by e-mailing [support@outdoorlads.com](mailto:support@outdoorlads.com), letting us know how many leader rewards you wish to use. Sorry, but we are unable to provide this retrospectively if your direct debit has already been applied for or taken.

If you want to use coupons towards the cost of a fixed term membership you can do this by going to the membership page and buying a fixed term (3, 6 or 12 month) membership.

Leader credits are valid for 18 months from the date on which they were issued, after which time they expire. If you have some expiring soon and aren't able to use them, e-mail in to [support@outdoorlads.com](mailto:support@outdoorlads.com) and we can add three months onto them to give you a chance to use them.

Once expired however, we are unable to reinstate expired leader credits. We are grateful to those leaders who don't make use of leader credits as their personal choice, as this does of course, help improve the charity's financial position and is much appreciated.

## 4. Saying 'Thank You' to Leaders

Please remember that leader credits are not the organisation's way of thanking our leaders for giving their time, but to contribute towards costs incurred. If someone isn't eligible for leader credits but has helped you out on your event and you'd like that to be recognised, please let us know on [support@outdoorlads.com](mailto:support@outdoorlads.com) and we will e-mail them to say thank you. We'll make their regional co-ordinator aware of their additional efforts, and we'll also keep a record to support nominations at the OutdoorLads Awards, which takes place at the AGM each September.

## 5. Leader Expenses

### 5.1 Purpose

The purpose of the policy is to define reasonable out-of-pocket expenses and requirements for eligibility for volunteer event leaders. By defining reasonable expenses, reimbursement payments will not be considered taxable income. OutdoorLads volunteers are not under any contractual obligation or promise for current or future paid work, and as such are not paid for their time. OutdoorLads does not provide payments, reward or benefit in kind. This is in line with HMRC guidance.

This policy aims to meet UK Government guidance on fair treatment of volunteers, and promote equal opportunity and recognition of the value of our volunteer leaders when undertaking activities on behalf of OutdoorLads incurring reasonable out-of-pocket expenses.

OutdoorLads supports the principles of zero-cost volunteering to help ensure that every leader is able to contribute to OutdoorLads and run events regardless of personal financial situation.

Each year, OutdoorLads organises in excess of 1,600 events, with the majority led by volunteers. Although we would like to be able to reimburse all out-of-pocket expenses, as a membership charity organisation we simply do not have sufficient funds. We recognise however, that some volunteers may not be able to afford to pay out-of-pocket expenses associated with their contribution, and we will support any such reasonable expenses where claimed. This policy is in place to support those individuals to continue to play an active role in volunteering events for OutdoorLads.

We do not expect volunteers to provide evidence of their financial circumstances and will not ask you about it. As such, there is an element of trust for the individuals concerned.

Equally, OutdoorLads recognises that many volunteer leaders do not claim for every expense that they incur and is grateful for this additional generosity.

Staff, Committee Members and the Board of Trustees have a responsibility in ensuring that volunteers can request reimbursement for expenses confidently and openly.

## 5.2 Definition

Specific policy guidance for Trustees, Sub-committee Members and staff when acting in those roles is detailed in the [Expenses for Trustees, Sub-Committee Members and Staff Policy](#).

This policy applies to all individuals when acting in their volunteer event leader role, regardless of if they hold any other roles in the organisation, including for staff who may volunteer to lead events.

Reasonable out-of-pocket expenses incurred while undertaking duties on behalf of OutdoorLads may include, but is not limited to:

- Travel costs
- Food and refreshments
- Cost of equipment, protective clothing, etc.
- Entry fees to climbing venues (this is not payable for cultural and heritage or social events)
- Attendance at training events and courses

## 5.3 How to Claim Expenses

In line with Government guidance and HMRC legislation, OutdoorLads will only reimburse actual costs incurred as eligible expenses defined by this policy.

Individuals making a claim for reimbursement are required to supply appropriate evidence of expenses, such as receipts or invoices, supported by the [expense claim form](#) and submitted to [finance@outdoorlads.com](mailto:finance@outdoorlads.com). Ideally, please include a VAT receipt wherever possible. For larger expenses, you will be required to provide a VAT receipt.

Expense claims are due by the end of the month following the month in which the expense was incurred (for example: if your event took place in July, you should submit your claim by 31 August.). Claims submitted after the claim period will not be reimbursed, unless by exception and express agreement from the Treasurer or Programme Manager.

## 5.4 Event Types and claimable expenses

This expenses policy applies for any event types where the volunteer event leader wishes to make a claim in order to ensure that they are able to participate fully in their volunteering activity, subject to the constraints set out below.

Please note that where expenses are claimed and paid, the associated leader credit will be removed. This is because leader credits are there in lieu of expenses, and so this avoids us paying twice for the same costs incurred.

For paid events such as hostel and camping events, you will be made aware of the budget available to you in advance. This includes travel to and from the venue, food for the weekend, and a budget for additional items, usually £20 but frequently varies.

For day events many people choose not to claim expenses, but this policy is here to support those who may need to do so, in order to be able to contribute to OutdoorLads as a volunteer. You would usually be expected to limit such events to the region where you live, in order to be able to minimise the financial impact for OutdoorLads. For example, leaders from the South West leading Scottish walks would not be sustainable for the organisation! If you are anticipating claiming expenses for day events, please send an e-mail to [finance@outdoorlads.com](mailto:finance@outdoorlads.com) to make the office aware at the time you send the event for publishing. Please mention in your e-mail the anticipated total spend (an approximation is fine – we know you won't always have an exact figure) and send us the link to the event page (the URL) to assist us in administering the expenses.

We will aim to almost always pay expenses submitted in line with the policy. However, the office staff are able to veto the expenses / event or ask you for further information on the expenses if there are any queries. In all cases, the decision of the Programme Manager is final.

If expenses are not notified to the office in advance, and when received are deemed to be excessive or unnecessary, they may not be paid. Therefore, please do ensure you notify us in advance as outlined above.

For any other volunteering activity – for example if you are away overnight on a training course – please speak to the office in advance before incurring any expenditure to discuss the situation and the likely expenses. The office will advise



on what expenses can be incurred. We will always aim to be supportive in that regard, but also to keep under control the financial impact on the organisation and help deliver best value, whilst ensuring that volunteers can still participate fully.

The below table summarises the parameters within which OutdoorLads expects leaders to claim reimbursement of expenses.

Event type	Maximum Expenses	Example Expenditure
Day Events 4 hours or more	£8*	Mileage, public transport**, map, parking. Not entry into third party venues.
Day Events Less than 4 hours	£8*	Mileage, public transport**, parking. Not entry into third party venues.
Indoor climbing Beginner-friendly event in which the leader does not get to climb	£8 (+ centre entry)	Centre entry, mileage, public transport**, parking
Indoor climbing Without a beginner	£8	Mileage, public transport**, parking
Hostel and Camping Events	£100*	Mileage, public transport**
BIG Events BIG Events Team members	At Programme Manager's / Treasurer's Discretion	Mileage, public transport**, parking
BIG Events day events	£8***	Mileage, public transport**, parking

Table 5.4.1: Leader Expenses available for reimbursement

\*At Programme Managers Discretion

\*\*Standard class, not including third party booking fees or insurance

\*\*\*BIG Event venue is starting point for claims, not volunteer's home

International travel and accommodation will not be reimbursed.

In addition, please note:

- 5.4.1. For travel to events on public transport where the ticket cost is in excess of the schedule set out in Table 5.4.1, volunteers should contact the Programme Manager in advance to determine the level of support available. This would usually be granted where the journey length and cost is proportionate to the event. For example, travel from London to Yorkshire to lead a day walk would be unlikely to be supported, but a similar event in Surrey would be.
- 5.4.2. For events including an entry or other fee from a third party, such as bowling, kayaking, a theatre trip, or a cultural and heritage event, we do not

pay that fee for a leader, and they will need to cover that cost themselves and book onto the OutdoorLads event page in the usual way.

- 5.4.3. Co-leaders can claim the same expenses as the main leader, provided that they are required by our operating procedures to be in place for the event. See the section on co-leaders in the leader credits section of this policy.

## 5.5 Travel Expenses

In line with limiting our environmental impact, where possible, volunteers should use public transport. Full reimbursement of fares incurred will be paid provided that appropriate tickets and receipts are provided and the cost is proportionate to the event. Where the use of a car is likely to be more cost-effective or practical, then a car/vehicle can be used subject according to specific guidance below.

Volunteers with disabilities using taxis, will not be expected to use their Taxi Card in the course of voluntary work.

Travel/mileage expenses necessarily incurred by volunteers in the performance of their official or other authorised duties will be reimbursed. Receipts / tickets will need to be provided, including a fuel receipt. For train travel, only standard class fares will be reimbursed. We would appreciate you securing the best possible ticket price by booking in advance. We will not reimburse booking fees from third party selling websites or optional insurance cover which is frequently offered.

As of the date of this policy (April 2024) mileage will be paid at 25p per mile to contribute towards volunteer costs without incurring unsustainable costs to the charity. We will require a VAT fuel receipt to cover the full amount you are requesting to be refunded.

We can pay for parking, but you should be mindful of the expense being incurred and attempt to limit it wherever possible, including considering where you will need to park.

## 5.6 Food and refreshments

These may be claimed if you are away from home for an extended period of time (usually overnight) volunteering for OutdoorLads. It is uncommon for these to be claimed for day events, and for overnight events food is included anyway.

If you are part of the BIG Event Team your food and drink will usually be covered whilst at the event. You can claim reasonable expenses of food and drink during long journeys, for example at service stations. You should make efforts to minimise the costs incurred by only buying what you need.

For any other volunteering activity, please discuss with the office in advance. However, we will usually ask you to cover these expenses yourself when away from home on the basis that OutdoorLads is contributing in other ways. If this is not possible, we will make some contribution of an agreed amount.

We will not provide expenses for alcohol.

## 5.7 Equipment and any other expenses

For any other items of expenditure including equipment, please contact the Programme Manager before committing any expenditure in order to discuss and agree on what can be provided.

Expenses incurred without prior agreement may not be paid to you, so it is important to have the conversation in advance.

It may be that an application to the OutdoorLads Foundation is more appropriate in some circumstances. The Programme Manager will advise if that is the case.