

SFTMVD7

Manage volunteers' expenses



Overview

This unit is about managing volunteers' expenses.

It involves reimbursing expenses, maintaining records of expenses and dealing with anomalies in line with your organisation's policy.

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Performance criteria

Reimburse volunteer's expenses

You must be able to:

- P1 help volunteers clearly understand your organisation's policy on expenses – what expenses it will reimburse and what expenses it will not
- P2 agree with volunteers the procedure for reimbursing expenses and when they will be reimbursed
- P3 encourage volunteers to claim expenses in line with your organisation's policy
- P4 verify that volunteers' expenses have actually been incurred and that they are reimbursable under your organisation's policy
- P5 reimburse volunteers expenses according to the agreed procedure and timeframe, obtaining a receipt if expenses are reimbursed in cash
- P6 ensure that volunteers understand their responsibility to maintain records of their own expenses for tax purposes

Maintain records of expenses and deal with anomalies

You must be able to:

- P7 maintain accurate records of expenses claimed and reimbursed in secure systems that comply with legal and organisational requirements
- P8 review records of expenses periodically to identify any anomalies in patterns of claiming
- P9 check out any anomalies with the volunteers involved and identify the reason for the anomalies
- P10 report any unexplained anomalies to the appropriate authority

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Knowledge and understanding

You need to know and understand:

Activity and project management

K1 monitoring principles, methods, tools and techniques

Analysis, accounting and decision-making

You need to know and understand:

K2 accounting principles, methods, tools and techniques

K3 analytical principles, methods, tools and techniques

K4 estimating principles, methods, tools and techniques

K5 legal and organisational requirements relevant to financial management

K6 problem-solving principles, methods, tools and techniques

K7 validation and verification principles, methods, tools and techniques

Information and communication

You need to know and understand:

K8 communication principles, methods, tools and techniques

K9 confidentiality principles, methods, tools and techniques

K10 legal and organisational requirements for the management of information

K11 questioning principles, methods, tools and techniques

K12 record-keeping principles, methods, tools and techniques

K13 reporting principles, methods, tools and techniques

People management

You need to know and understand:

K14 volunteer management principles, methods, tools and techniques

Work context

You need to know and understand:

K15 relevant organisational policies and procedures

K16 your own knowledge, skills and competence and the limits of these

K17 your role and responsibilities

Additional Information

Behaviours

1. Communication

- 1.1. present information clearly, concisely, accurately and in ways that promote understanding
- 1.2. keep people informed of plans and developments

2. Ethical stance

- 2.1 comply with, and ensure that others comply with, legal requirements, industry regulations, organisational policies and professional codes
- 2.2 act within the limits of your authority
- 2.3 act to uphold individuals' rights
- 2.4 show integrity and fairness in decision-making
- 2.5 say no to unreasonable requests
- 2.6 identify and raise ethical concerns

3. Focus on results

- 3.1 take personal responsibility for making things happen

4. Information and knowledge management

- 4.1 use cost-effective and time-effective means to gather, store and retrieve information
- 4.2 make best use of existing sources of information
- 4.3 keep confidential information secure
- 4.4 check the validity and reliability of information
- 4.5 push for concrete information in an ambiguous situation
- 4.6 analyse and structure information to develop knowledge that can be shared
- 4.7 make appropriate information and knowledge available promptly to those who have a right to it

5. Persuasiveness

- 5.1 present self positively to others

6. Relationship management

- 6.1 take timely action to resolve disagreements

7. Thinking and decision-making

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- 7.1 identify the range of elements in a situation and how they relate to each other
- 7.2 build a total and valid picture from restricted or incomplete data
- 7.3 articulate the assumptions made, and risks involved, in understanding a situation
- 7.4 take timely decisions that are realistic for the situation

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