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Smarter Volunteer Reimbursements:
What Charities Are Getting Wrong (and How to Get It Right)



Meet Paul



Customer
Success Manager

Here's a little bit about me...

I work closely with existing customers day to day to ensure ExpenseIn not only meets their expectations but also helps streamline business processes.

My focus is to make sure customers feel supported, confident and that they're able to get real value from ExpenseIn.

Paul Meenan

Customer Success Manager, ExpenseIn

Agenda

- Why Volunteer Reimbursements Matter More Than Ever
- Types of Volunteer Expenses
- Where Does Your Expense Process Sit?
- Volunteering in a Cost-Of-Living Crisis
- What Charities Are Getting Wrong
- Principles of Smarter Expense Management
- A Smarter Expense Workflow for Charities
- What Better Processes Can Achieve
- Practical Steps to Improve Your Process
- Enabling Smarter Expense Management with Digital Tools
- ExpenseIn's Ad Hoc Module
- Key Takeaways



Why Volunteer Reimbursements Matter More Than Ever

Charity finance teams need reimbursement processes that are simple and easy for staff and volunteers to use.

- Volunteers give their time for free.
- Getting it right shows volunteers they're valued, getting it wrong can quietly push them away.
- Finance teams still need visibility and control over that spend.



Types of Volunteer Expenses

Travel Expenses

- Personal vehicle
  - Mileage reimbursement
- Public transport
  - Bus/train fares
  - Passes

Meal Allowances

Meal allowances can help cover food costs. Clear guidelines for meal allowances ensures volunteers are supported and reimbursed.

Equipment & Supplies

- Examples include protective gear, wifi or phone data packages or stationary.
- Encourage capturing receipts immediately.

Where Does Your Expense Process Sit?

Manual & reactive

- Spreadsheet or paper-based claims
- Email approvals
- Limited visibility
- Slow, inconsistent reimbursements

Partially structured

- Some policies in place
- Mix of manual and digital processes
- Approval workflows exist but are inconsistent
- Delays still common

Streamlined

- Clear policies and submission guidelines
- Defined approval workflows
- Faster, more predictable reimbursements
- Improved visibility for finance teams

Fully optimised

- Simple, consistent submission experience for staff and volunteers
- Automated workflows and approvals
- Real time visibility and reporting
- Strong audit trail and compliance

Volunteering in a Cost-of-Living Crisis

Volunteers Left Out of Pocket

- Volunteers may have to cover expenses themselves
- Some people simply cannot afford to volunteer regularly
- Unintentionally create barriers to participation



14.2 million

people in the **UK** volunteered through a group, club or organisation **at least once.**

8.3 million

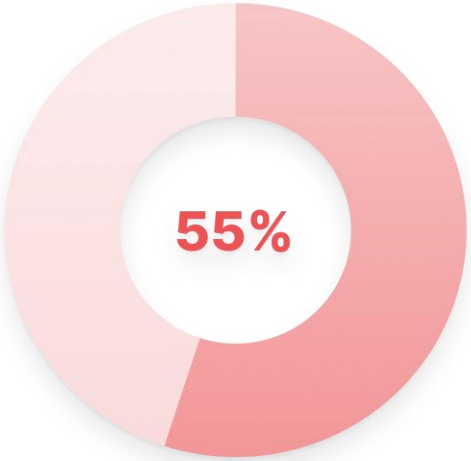
did so **at least once a month.**

NCVO, *UK Civil Society Almanac 2024*

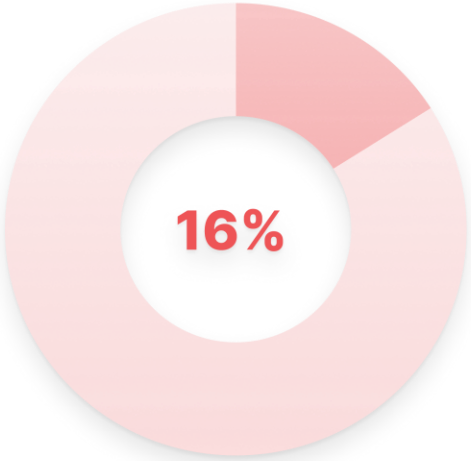
Volunteering in a Cost-of-Living Crisis

Slow Reimbursements

- Reimbursements can take weeks
- Volunteers and staff lack visibility on claim status
- Not just inconvenient to volunteers, but can act as a barrier to volunteering at all



Only **55% of volunteers** say their organisation would reimburse expenses if they asked



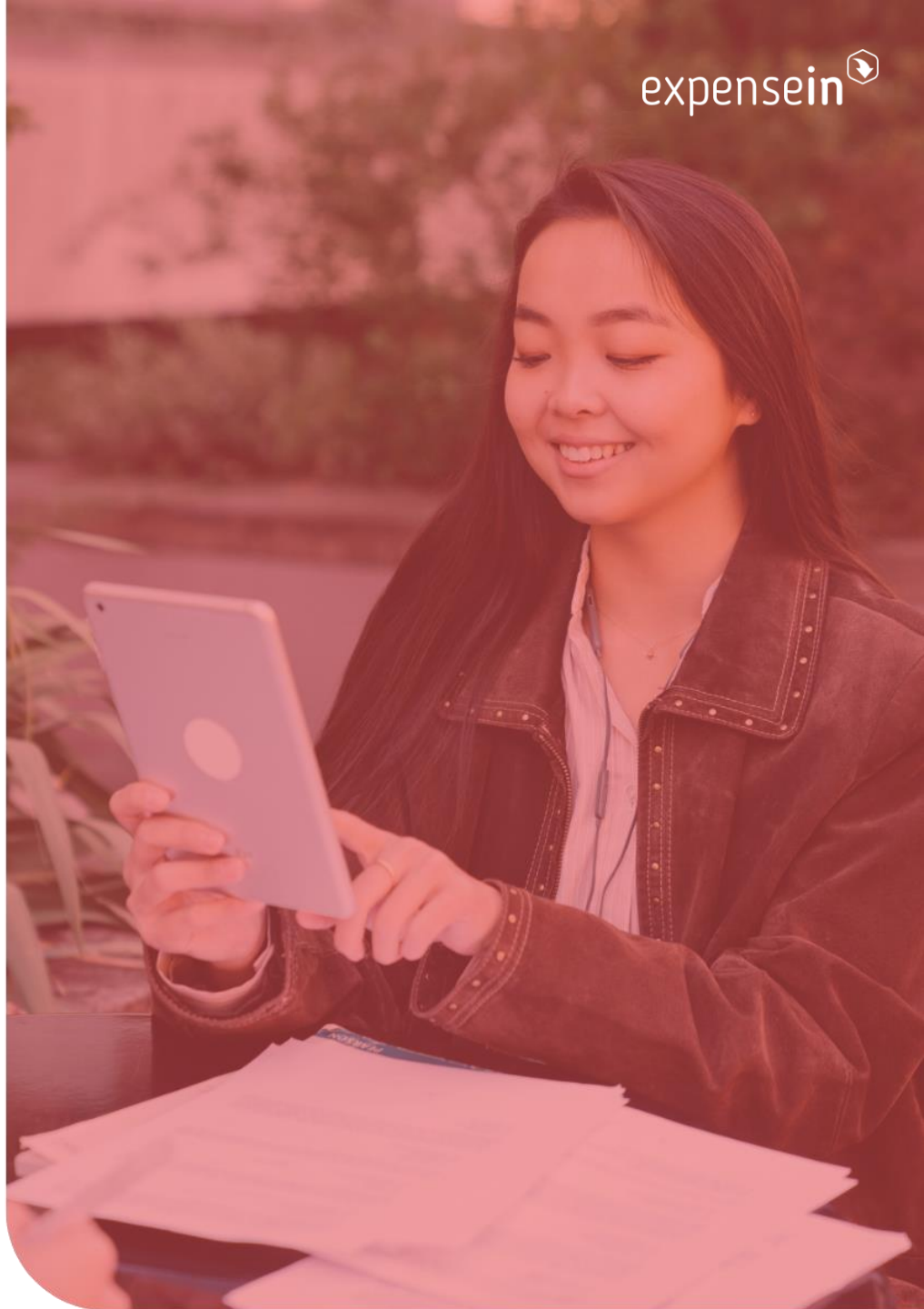
16% are **unsure**

NCVO, Time Well Spent 2023

What Charities Are Getting Wrong

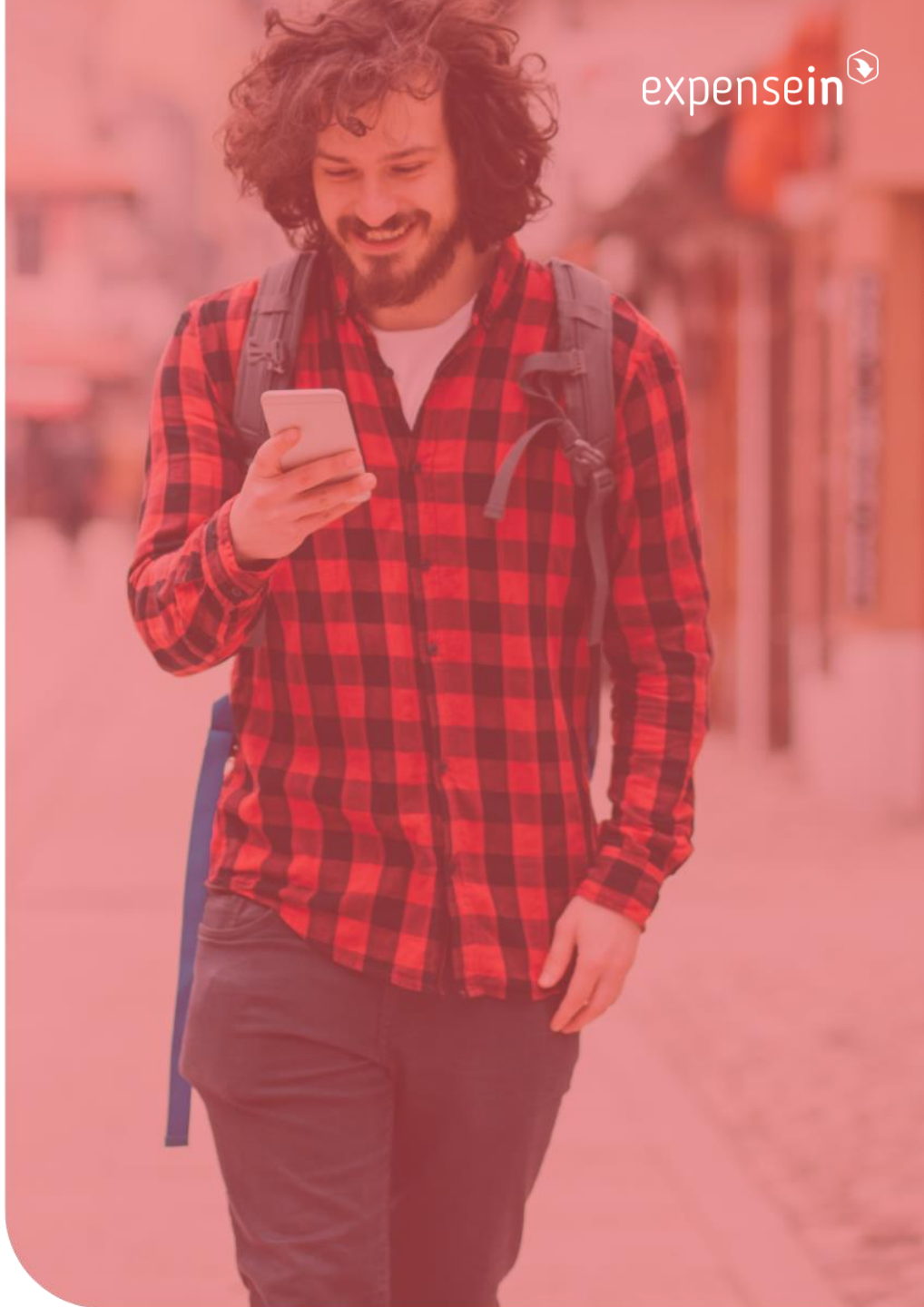
It's rarely the people, it's the process.

- Manual spreadsheets or paper claims
- Lost receipts & late claims
- Multiple approval layers
- Lack of visibility into claim progress
- Expense policies that are unclear or outdated
- Lack of real time visibility and oversight
- Onboarding can take too much time for volunteers



Principles of Smarter Expense Management

- **Clarity**: Clear and accessible policies
- **Consistency**: Simple submission processes and defined approval workflows
- **Efficiency**: Faster reimbursements
- **Visibility**: Real time insights, tracking and transparent reporting



A Smarter Expense Workflow for Charities

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1 Clear Guidelines

- Define what can and cannot be claimed
- Share policy with volunteers and staff upfront

2 Documentation & Record Keeping

- Verification: Receipts serve as proof of the expenses.
- Audits: Having a set of receipts helps demonstrate compliance.

3 Simple Submission

- Encourage capturing receipts immediately.
- Submit expenses quickly (ideally within a set timeframe)

4 Structured Approval

- Defined approver
- Set expectations on timelines

A Smarter Expense Workflow for Charities

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5 Finance to Review

- Validate claims
- Ensure compliance
- Clear audit trail
- Categorise for better insight

6 Prompt Reimbursements

- Process payments regularly (weekly/bi-weekly)
- Communicate timelines clearly
- Regular payment cycles
- Reduce financial barriers

7 Reporting & Visibility

- Track spend by category
- Monitor trends
- Provide visibility to finance and leadership

8 Continuous Improvement

- Review policies regularly
- Gather feedback from volunteers and staff
- Identify bottlenecks

What Better Processes Can Achieve



Improve consistency

Clear policies and standardised submissions reduce errors and out-of-policy claims.



Strengthen oversight

Defined approval steps provide visibility and control over spending.



Ensure accurate records

Proper documentation and validation create a reliable audit trail.



Reduce process gaps

Streamlined workflows minimise delays, bottlenecks, and manual errors.



Increase accountability

Clear roles and approvals ensure responsibility at every stage.

Practical Steps to Improve Your Process

Where to start?

1. Review your current expense policy
2. Map your existing approval workflow
3. Identify bottlenecks and manual tasks
4. Introduce clearer submission guidelines
5. Explore digital tools that reduce admin



Enabling Smarter Expense Management with Digital Tools

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Digital tools can support the workflow, helping charities to:



Simplify submissions
Capture receipts and submit claims quickly and consistently



Speed up approvals
Automate workflows and reduce bottlenecks.



Improve visibility
Provide real time insight into claims and spending



Reduce admin time
Minimise manual processing for finance teams



Strengthen security and compliance
Ensure policies are applied consistently with clear audit trails.

ExpenseIn's Ad Hoc Module

Custom branding

Add your logo and brand colours with our white label options to make it your own.

Sign up quick

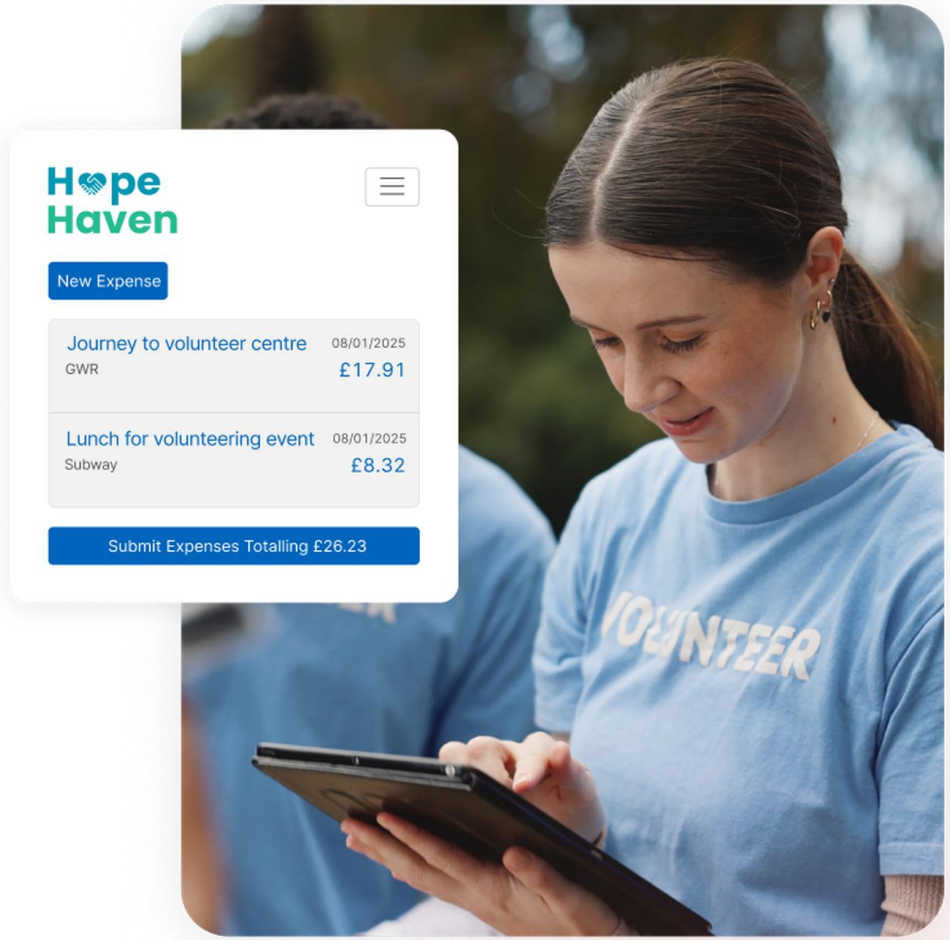
Easy sign-up process gets volunteers ready to submit expenses in moments.

Quick reimburse

Simplify payments to provide timely reimbursements for volunteers.

Instant expenses

Volunteers can quickly submit expenses, speeding up the entire process.



Key Takeaways

- Expense processes impact more than finance.
- Inefficient workflows create hidden organisational costs.
- Clear, structured processes reduce friction and risk.
- Small improvements can have a big impact.
- Remove the friction so, you can focus on delivering your mission.



Want to learn more about ExpenseIn? Book a call with the team:

- paul.meenan@expensein.com

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Questions?