

## **Finance and volunteer management – a partnership that works for everyone**

How The Felix Project's finance and volunteer management teams worked together to automate an onerous manual process and support volunteer retention.

The Felix Project is a London-based food redistribution charity set up in 2016 to tackle food poverty and food waste. The organisation rescues good, surplus food from the food industry that cannot be sold and would otherwise go to waste. They then sort and then deliver this food to almost 1000 front-line charities, primary schools and holiday programmes in London.

The charity relies on hundreds of volunteers each day to drive their vans to collect food and work in the kitchen, warehouse, and depots across London.



### **The Challenge**

Historically, the process of administering and paying volunteer expenses has been very manual and arduous for the Finance Team. Furthermore, when the Felix team took over the management of the Deptford food redistribution centre from FareShare, the site has its own volunteer expense process, involving having petty cash on site to pay volunteers. This lack of standardisation across the sites made it even more difficult to manage and audit expense, and heightened the risk for the Finance Team.

The Volunteer Team also wanted a quicker and easier process for volunteers. The aim was two-fold. Foremost, to have a system which would improve the turnaround time for

expenses to be reimbursed. Secondly, to move away from the paper-based system. The use of paper expense forms (which held personal detail) was problematic with forms

being misplaced and receipts going missing. Consequently, volunteer details were compromised and sometimes they were unable to claim what they were entitled to.

Both teams work closely and were also aware that the budget set for volunteer retention has been historically underspent and, in the current economic climate, they realised that paying volunteer expenses would become essential for volunteer retention.

### **Collaboration to solve a shared problem**

The Finance Team was tasked with researching the market for solutions and they contacted vHelp to have a demo to see how the system worked and ask questions. It was important for both teams to be involved at the demo stage as each had different needs to be addressed by the solution.

After reviewing their options, the team decided to pilot vHelp for one with one site to see how the system would work for them and get feedback from volunteers. Around the same time, we were developing vHelp's Teams feature, for larger organisations with geographically dispersed teams and various volunteer managers. So, the Felix Project was one of the first organisations to trial vHelp Teams.

The pilot was successful and the feedback from all users was mostly positive, so the Felix team decided to adopt vHelp and rolled it out across all their sites. Natasha Barrett, the organisation's financial controller said:

*“Using vHelp saves us a lot of time within the finance department - it has really cut back the amount of manual input needed and reduces the possibility of error and risk by having volunteers make their claims directly into the system.”*

### **Expenses as part of a wider volunteer retention strategy**

The Covid pandemic and the cost-of-living crisis have had a huge impact on the organisation as, unfortunately, more people now need their services, therefore they need more volunteers to support their growing operations.

Paying expenses quickly is part of a wider volunteer retention strategy that includes a lot of flexibility (there is no minimum commitment from volunteers), social and well-being activities, acknowledgement and rewards and employability schemes, designed to provide volunteers with a variety of support, community, and growth opportunities.

*“After the pandemic, with people going back to school and work, you must be creative about how to entice volunteers to join and keep them. So being able to claim your travel costs easily seems like a simple thing to do, it may not seem like a benefit, but it is very important to keep people happy.”*

Lucy Heyderman – Volunteer Manager

The Volunteer Team is seeing the impact of the increasing rise in living costs on their volunteers. To support volunteers further, the team is aiding additional flexibility to the expense process. For example, a handful of volunteers have requested back-dated expenses. Taking into consideration the current climate, the team is allowing volunteers to backdate their expenses as far as 3 months. With volunteers having to limit their outgoing expenditure, this move has been well received.

Recently, the organisation also started providing the opportunity for volunteers to take food parcels if needed, discreetly.

### **Funding volunteer expenses**

Since implementing vHelp the team saw a significant increase in expense claims. The team attributes this to the implementation of a much more user-friendly system as well as clear communications around the expense policy. Across the charity sector, volunteer-centred organisations such as TFP are focusing on ensuring their volunteer offer is as accessible as possible for people feeling the pressures of the cost-of-living crisis. A clear expense process and policy is a key means of tackling this challenge.



*“We have definitely seen more expenses going through since implementing vHelp, which is great because it means volunteers are finding it easier to get their costs back. “*

As an organisation that relies heavily on volunteers, The Felix Project receives funding from corporate funders and foundations to cover the cost of volunteer expenses. Volunteer expenses are always included in the funding or grant applications as well as having a dedicated budget.

The leadership team recognises volunteers' needs and has been proactive in addressing them, for example by increasing their volunteer management team recently and bringing on vHelp.

So, there is a firm understanding from all sides of the support volunteers in general, which includes paying expenses and making the claiming process simple, to make sure volunteers are not left out of pocket for giving their time. Natasha explained:

*“A couple of our corporate sponsors fund part of the volunteer expenses budget. Funders realise that volunteers are very much needed by us, we couldn't really work the way we do without them, so they are keen to make sure the volunteers are getting their expenses money back, which is great. They are equally keen to help.”*

All these initiatives help TFL to keep their current volunteers involved, recruit a more diverse volunteer workforce and continue serving the communities across London whilst reducing food waste.