

## **BRISTOL AREA QUAKER MEETING (No 1175435)**

### **Policy on REIMBURSEMENT OF EXPENSES.**      Revised: 11/05/18

**Note:** This Policy relates to Area Meeting activities, not Local Meetings. Local Meetings are advised to implement similar policies to this in relation to expenses incurred on their behalf. In appropriate cases this may include reimbursement of travelling cost for infirm Friends attending Area Meeting.

#### **1. Policy**

Members and Attenders ("Friends") are encouraged to attend conferences and courses that help them in their appointed roles, or that help them in their spiritual development, and to claim for the expenses incurred.

#### **2. Authorisation**

Friends may claim for reimbursement of expenses personally and necessarily incurred as a direct result of:

- a. An activity authorised by a Minute of AM, or of AM Elders, AM Overseers or Trustees, such as attending a course or conference on behalf of the AM; and
- b. Incurring incidental expenses (e.g. postage, stationery, travel) in the course of carrying out AM duties in an official capacity or at the request of someone in an official capacity.

#### **3. Personal spiritual development**

Friends intending to attend courses or conferences which do not fit the criteria in paragraph (2) should apply to their Local Meeting or to Weekly Committee. The criteria used by Weekly Committee include the suitability of the applicant as against other Friends who may want assistance and any previous grants to the applicant. The Local Meeting or Committee may choose to pay only part of the fee and travel expenses. Weekly Committee will use appropriate Trust Fund money for this purpose wherever possible.

If there is any doubt about whether a course or conference is needed or appropriate, Friends should consult with AM Nominations Committee or with the Clerk to AM Elders or Overseers or with local Elders or Overseers as appropriate.

#### **4. Expenses which may be claimed include:**

- a. **Travel costs:** Friends will normally use public transport. Where long distance travel is involved we expect to pay for an advance ticket, on the understanding that if the Friend is prevented, Area Meeting will still bear the cost. When private transport has to be used a rate of 25p per mile may be claimed.
- b. **Accommodation:** Where an overnight stay is unavoidable if the duties are to be carried out effectively. Friends are asked to use moderately priced accommodation. For Bristol area residents, a one-day event in London would not normally justify overnight accommodation.
- c. **Office expenses** such as postage, stationery, telephone, photocopying. Where home equipment is used for printing a rate of 5p per side may be claimed.
- d. **Meeting for Sufferings:** Travel expenses of Friends attending.
- e. **Yearly Meeting** Members are encouraged to attend if they otherwise could not afford to do so. Apply in confidence directly to the Area Meeting Treasurer (AMT).

#### **5. Overseers** should take steps to encourage Friends to claim. Particular care should be taken to ensure Friends with disabilities are encouraged to attend appropriate courses and conferences, and are advised that reasonable additional costs arising by reason of their disability will be met.

#### **6. Budget**

Where a relevant budget exists, proposals that may incur expenditure in excess of the budget must be discussed with the AMT beforehand.

**7. Pre-payment**

The AMT may in exceptional circumstances provide funds in advance of expenditure.

**8. Claims**

Claims should be made by submission to the AMT within three months of the date the expenses were incurred, and should be supported by original receipts wherever practical (and in any case for amounts above £5) and a statement in support of the claim which clearly shows:

- the reason for the expense;
- the date when it was incurred;
- supporting calculations when receipts are not available;
- the claimant's bank sort code and account number; and
- the claimant's name, Local Meeting and signature.

*This Policy replaces two former policies, the Policy on Expenses and the Policy on expenses for courses and conferences.*

*Comments or suggestions about this Policy should be forwarded to the Policy Owner.*

Policy/Revision Agreed by;	Date / Minute
Finance Committee (Owner)	16/3/18
Trustees	11/5/18

Policy to be reviewed (Year): 2021