

LEEDS AREA QUAKER MEETING

23.08.2022

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 Pastoral Care Team 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. The Local Meeting may choose to pay only part of the fee and travel expenses.

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 Pastoral Care Team or with local Elders or Pastoral Care Team 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 35p 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.
- 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.

5. **The Pastoral Care Team** 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 Area Meeting Treasurer beforehand.

7. **Pre-payment**

The Area Meeting Treasurer may in exceptional circumstances provide funds in advance of expenditure.

8. **Claims**

Claims should be made by submission to the Area Meeting Treasurer 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 name, name on bank account, sort code and account number; and
- the claimant's name, Local Meeting and signature.

All those who can legitimately claim expenses are encouraged to do so because it allows LAQM to accurately calculate its running costs. If individuals wish to contribute to LAQM by foregoing their expenses claim, they are nonetheless encouraged to make the claim and then give the money as a donation, upon which Gift Aid can be claimed where appropriate,

Policy to be reviewed (Year): 2025