

Cardiff U3A Guidelines for Expense Claims

Expenses for travel and accommodation should normally be approved in principle before the event and, on request, payment in advance may be made. Receipts should be provided whenever possible. Requests for approval should be made to the Treasurer in the first instance, or another Officer in his / her absence.

It is not normal practice to claim for travel to committee and other meetings held within a 5 mile radius of Cardiff city centre.

For meetings or U3A events outside Cardiff, coach travel or second class rail travel will be reimbursed or for car journeys 45p per mile (irrespective of number of passengers). Car parking costs, supported by a receipt, may be claimed. Where travel is by car it is expected that trustees / members travel together. If not, the expenses for one car will be shared pro rata between drivers. The motorcycle rate is 24p per mile. Taxi fares should be approved prior to travel except in the case of emergencies.

Car drivers are reminded that *“anybody who uses their car on U3A business should ensure that they have adequate [car] insurance including occasional business use”* and that the trustee / member is responsible for any fines or penalties incurred.

For a one day meeting or event, members would normally be expected to provide their own refreshments (or these may be provided at the meeting).

The guide for accommodation is £60 to £80 (London £100) per night. If a second person, not on U3A business shares the room, 50% will be paid. Expenditure on subsistence (with receipts) may be reimbursed up to £20 per 24 hours.

Postage costs will be met. Telephone calls which are not included in ‘free minutes’ packages or landline deals can be claimed (with support of log of purpose). N.B. Trustees and helpers in the relevant positions will have the use of a Cardiff U3A phone and package, to be used for U3A business only. Applications for the cost of care of dependants should be made to the committee for consideration.

“As all U3A members offer their services free to the movement, the organiser(s) must not get pecuniary reward for organising an event”. This applies to trustees, convenors, and members alike.

All expenses should be approved by an Officer.

No Officer should approve their own expenses.

Quotations from: Third Age Trust: Financial Matters.