



Southern Motorcycle Advanced Rider Training

SMART Expense Policy

Southern Motorcycle Advanced Rider Training (SMART) is a registered charity and any money it holds must be considered as charitable funds. As Trustees, the Committee have an obligation to ensure that all disbursements are made for the purpose of furthering the charitable purposes of the Group.

At the same time, the Group recognises the fact that members acting officially on behalf of the Group should not be forced to be out of pocket and so may make claims for the re-imbursment of reasonable expenses.

Where there is any doubt regarding the validity of any expense this should be cleared in advance with the Treasurer.

It is important that members do not enter the Group into binding agreements without prior authorisation.

Allowable Expenses

The following are expenses which have been approved by the Committee:

1. Observed Rides by Instructors

Instructors do not claim expense for Observed Rides from the Group itself, except as outlined in the Notes below.

The Instructor may ask for a contribution up to £15 from a trainee for an Observed Ride, but may not take out more than two associates on any Observed Ride. When two trainees are taken out on the Observed Ride, then each should contribute up to £10.

For full training days of morning and afternoon Observed Rides the voluntary contribution for the Instructor with a single Associate would be £30 (2 x £15). An Instructor with one associate for one session and the maximum of two for the other session £35 (1 x £15 plus 2 x £10), and an Instructor observing the maximum of two associates in a day £40 (2 x £10 plus 2 x £10).

If an Instructor does not wish to ask for any contribution from their trainee, they should remind trainees that some Instructors need this contribution and that it should be offered.

NOTE: When an Instructor gives a free assessment ride to a non-member at a monthly training session (i.e. Tulley's Farm or Mickey's Diner), they are entitled to claim £15 from the Group.

2. Monthly Ride Outs

Instructors or Members leading monthly Ride Outs may claim their mileage on the actual Ride Out day, at a rate of 25p per mile, up to the following maximums:

UK based Ride Out: £50 (200 miles)

European Ride Outs: £75 (300 miles)

(Note; preparation runs may NOT be claimed for)

3. Official Business

When members, whether they be Committee members or not, are acting on behalf of SMART in an official capacity, reasonable expenses may be claimed. This may include e.g. stationary, postage, printing, telephone calls and mileage (at 25p per mile).

4. Ride School

All direct costs for the holding Ride School (room rental, teas and coffees etc.) are paid for directly by the Group.

Instructors and others helping on Ride School may claim the following expenses from the Group:

Mileage for Instructors and other helpers: 25p per mile travelling to and from venue.

Speakers: To be agreed individually where required.

Other expense: To be agreed in advance.

5. Approved Instructor Training Course

This course will be wholly sponsored by the Group. Expenses for those involved will be paid as follows:

Mileage for Instructors and other helpers: 25p per mile travelling to and from venue.

Speakers: To be agreed individually where required.

Trainee Instructors: A £100 allowance will be paid at the end of successful training and passing of the Approved Instructor Test.

Supervising Instructor:
(no associate present) £15 per training ride from Group funds.

Other expense: To be agreed in advance.

6. Senior Instructor (Advanced Tutor) Examination and Training

The cost of examination will be wholly funded by the Group.

Presently no training program has been set up for Instructors to progress to Senior Instructor Status. If and when this is organised the financial support that the Group gives to this will be considered by the Committee.

7. Diploma Course

Due to the introduction of the Advanced Instructor Grade and the Group's commitment to fund the Advance Tutor training and examination, the Committee do not consider it necessary to offer sponsorship for members wishing to attend the Diploma Course. Only in exceptional circumstances will a request for sponsorship be considered and then only if it can be shown to be in the interests of the Group.

8. Events Expenditure

As a general rule, all events should be self-financing, however there are certain specific areas required comment:

Slow Riding Day:

A small fee may be charged to members attending, but the Group may meet the full costs of the venue hire. All Instructors helping on the day may claim a £15 allowance from the Group.

First Aid Course:

A fee will be charged to those attending towards the fees. The Group will usually pay the cost for the venue hire, and will usually donate approximately 50% of the remaining costs.

9. One off events – Instructor Meetings etc.

The Committee may organise certain events, and will decide what expenses can be claimed. Such events may include:

Prospective Trainee Instructor Meeting

Instructors' Meeting

Silver Improvers' Training Course

The Committee will endeavour to inform the relevant persons what expenses may be claimed for regarding each event, but if there is any doubt, Members are encouraged to contact the Treasurer for clarification.

Responsibility

The Committee as a whole takes responsibility for the financial performance of the Group. The Expenditure policy is subject to collective decision making process of the Trustees of the Committee. Should the Group end up posting a deficit at the end of an accounting period as a result of these policy decisions, the Treasurer alone shall not be held responsible.

If a review of the Group's financial situation indicates that a deficit is likely, due to an increased number and value of claims and increased Instructor involvement, the Committee may take steps to rebalance the situation. Increased fees or reduced expenses payments for example.

Authorisation of Expenses Payment

For standard expenses such as mileage, the Treasurer may approve directly, but may also seek approval from another Committee Member, particularly for larger claims (more than £20).

For other expenses, particularly any third party costs, the Treasurer must seek approval from another Committee Member.

How to Claim

Where an expense incurs a third part cost, a full receipt must be provided and submitted together with a completed, signed expenses form by email.

Please contact the Treasurer if you are unable to provide electronic documents by email.

For simple mileage expenses, the claimant may email the Treasurer at treasurer@rospasmart.com giving full details of the date, mileage, purpose of ride, name of Trainee etc.

A copy of the Expenses Claim Form can be downloaded from the website, and can be filled out electronically or alternatively can be printed out, filled in and posted. Please contact the Treasurer to discuss.

Method of Re-Imbursement

The preferred method of payment is by bank transfer, which requires that the claimant provide the Treasurer with their Bank Account number and sort code. These may be emailed to treasurer@rospasmart.com or if email is not possible, by phone on 07850 228257.

The second preferred payment option is via PayPal to the Members PayPal account (the same they use to pay their Membership fees). NOTE; any PayPal fees incurred will be met by the claimant.

In certain circumstances, a cheque may be sent via post to the claimant, but this is a non-preferred option.

Approved by the Trustees of RoSPA SMART – November 2017