



Neurological Practice, PO Box 315, Leatherhead, KT22 2BA

## Policy: Financial and Operational Procedures

- *Neurological Practice* will refund external speakers for expenses incurred for work carried out for/on the behalf of SSNP
- It is expected that Neurological Practice NEC and regional committee members will not receive payment for presentations they deliver at regional or national events, although they could claim travel or accommodation expenses if agreed with NEC by prior arrangement (see funding form)
- The official Neurological Practice Expenses Claim Form (form A) must be used and is available from the treasurer and on the internet. All receipts must be attached. The claim form should then be sent to the treasurer. (Current Treasurer; Jo Evans, 4 St Peters Rd, Southport, PR8 4BY).
- Any external presenters need to complete a Speaker Contract Form (form B) that includes their NI number. This is a requirement of the College of Occupational Therapy
- Regions that are planning events that will incur costs over £100 need to complete a Request for finance Form (form C). This needs to be sent to the Treasurer Jo Evans, 4 St Peters Rd, Birkdale, Southport, PR8 4BY
- All events need to be planned with a budget in mind. When planning a study evening you need to aim to break even i.e. that the money you receive from people attending will be sufficient to pay the external speaker, if this is appropriate.
- All regions have to charge members a small fee for attending a study evening i.e. Members and students £1- £3 and non-members £2 - £5. (Study days vary from £60 - £120 depending on 1 or 2 days). Speakers can be paid from this money **ONLY** if they have completed a Speaker contract Form (Form B) and we have a copy of their National Insurance Number. If there is any other money that was generated from the evening, then this can be paid into the national account, using the Paying In Form (Form D). *The reason for charging is to ensure equality across regions. Some regions generate money this way and then use it to run bigger events or help other regions run events)*
- All regions need to send a copy of planned events to the Regional reps Co-ordinator ([regions@SSNP.co.uk](mailto:regions@SSNP.co.uk)) as well as to the website co-ordinator where it will be advertised ([website@SSNP.co.uk](mailto:website@SSNP.co.uk)). This will assist the Regional Rep to co-ordinate events in different regions and promoting access and equality across the UK
- Please use the 'Resources for study events' that is on the website for planning and organising a study event, including advertisements, flyers, application forms, invoices, check lists, etc.
- Each region needs to keep a copy of funding request forms, expense claim forms and speaker contact forms and monitor that monies were received. These will be collected by the Regional Rep co-ordinator or the treasurer on an annual basis for audit purposes
- Expenses will be paid by cheque and will be posted within 14 days of receipt by the treasurer
- The Treasurer or in the Treasurers absence, either of the other signatories will authorise i.e. sign and date these expense forms before cheques are sent out.
- Anyone asked to carry out work for *Neurological Practice*, where expenses are likely to be incurred, must be made aware of this policy before agreeing to undertake the work. All committee members are responsible for this
- Where unexpected work/meetings occur or work that is additional to that typically expected in the year, the committee must agree the ability to cover the expenses prior to the commitment

- It is the responsibility of the *Neurological Practice* NEC Treasurer to ensure that this policy is updated annually for the National AGM
- Subsistence costs will not normally be paid
- Any special requests to claim expenses other than those listed below should be directed to the chairperson or regional rep co-ordinator

**The following expenses will be paid:**

**Travel expenses**

- Mileage by car at 35p / mile
- Train/coach/bus fares
- Standard/second class only
- Tickets to be attached
- You are encouraged to book early to take advantage of discounts
- Taxi fares where no other form of transport is available or where there is a risk to personal safety with alternative methods.

**Accommodation**

- Accommodation costs will be refunded only when it is unreasonable because of journey length or meeting times to return home the same day
- A maximum of £40.00 (up to £60.00 in London) for bed and breakfast / night will be paid.



## Expense claim form (Form A)

**Please send form with attached bank paying in stubs to;**

**Jo Evans, 4 St Peters Rd, Birkdale, Southport, PR8 4BY**

It is assumed that members will make every effort to keep their expenses to a minimum.

Cost of travel will be reimbursed at standard class public transport rates.

Car mileage will be paid at 35p per mile.

Journeys from Scotland or Northern Ireland may be by air (economy) or rail sleeper.

Each expense item should be entered and **receipts attached (speaker contract form for speaker payment)**

<b>Name of Claimant:</b>	
<b>Contact address including post code:</b>	
<b>Telephone No:</b>	
<b>Reason for Claim:</b> (i.e. speaker payment)	
<b>National Insurance number:</b>	
<b>Event /date:</b>	
<b>Region and Key worker contact name:</b>	

<b>Details of Claim (Name for Payment):</b>	<b>£</b>

<b>Signature:</b>	<b>Date:</b>
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<b>Office use only:</b>	
Authorised by:	Date:
Signature:	



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## Speaker Contract for Study Day / Evening (Form B)

*(Please complete this form and send back to the event co-ordinator before the study evening)*

Title of event:	
Date of event:	
Name of speaker:	
Key worker name and e-mail address:	
National Insurance Number:	

**I agree to speak on the above study day and accept the following conditions:** *(please tick to indicate you agree)*

- I will be paid a fee of £ \_\_\_\_ for my presentation
- I will be responsible for providing my own presentation, although photocopies for delegates will be arranged by the key worker
- I will provide a copy of my presentation to the key worker via e-mail one week before I am due to give my talk
- I will indicate what media I will require for my presentation e.g. PowerPoint or OHP by the same date
- I understand that I have been allocated 45 minutes for my presentation and will leave sufficient time for questions after this
- Objectives for my talk include the following:
  - 1.
  - 2.
  - 3.

Signed:	
Name of speaker:	
Date:	





# Neurological Practice

A specialist section of College of Occupational Therapists



## Request for Finances to run a Regional Event (Form C)

Please post a copy to

Treasurer, Jo Evans, 4 St Peters Rd, Birkdale, Southport, PR8 4BY

<b>Name of Region:</b>	
<b>Date of request</b>	
<b>Name of Lead/ Organiser:</b>	
<b>Topic/ Title of Event:</b>	
<b>Date of Event:</b>	
<b>Proposed Venue:</b>	
<b>Proposed Speaker (s):</b>	

### Type of Event:

Evening presentation

1-day study day

2-day study day

Other (please specify) \_\_\_\_\_

Budget / Predicted Expenditure:		Comments
<b>Cost of Venue</b>	£	
<b>Cost of Catering</b>	£	
<b>Speaker's Fee(s) (How many speakers)</b>	£	
<b>Speaker's Travel (How many speakers)</b>	£	
<b>Other</b>	£	
<b>TOTAL</b>	£	

Predicted Income:		Comments
<b>Expected amount of delegates</b>		
<b>Course Fees (Cost per person)</b>	£	
<b>Stands</b>	£	
<b>Sponsorship</b>	£	
<b>Other</b>	£	
<b>TOTAL</b>	£	

Money requested from SSNP NEC:

£

Office use only:	
Authorised by:	Date:
Signature:	



## Paying in Form (Form D)

**Please send form with attached bank paying in stubs to:**

**Jo Evans, 4 St Peters Rd, Birkdale, Southport, PR8 4BY**

<b>Region:</b>	
<b>Event /date:</b>	
<b>Contact name:</b>	
<b>Contact address and post code:</b>	
<b>Telephone No:</b>	
<b>Budget feedback:</b>	<b>Predicted cost: £ _____ Actual Cost: £ _____</b>
(Please circle as appropriate)	<b>Profit                      Loss                      Broke even</b>
<b>Speaker payment:</b> (Please circle)	<b>Paid in cash form earnings or Expense claim form submitted</b>

**Details of account number / sort code:**

- **Account name : National Association of Neurological Occupational Therapists**
- **Account number : 80680532**
- **Account sort code : 20-13-42**
- **Barclays Bank**

<b><u>Cheques paid in to SSNP account</u></b> Please provide details of account holder /date/ amount (e.g Jane Brown : 25.6.05 £40 )	£
<b><u>Cash paid into SSNP account:</u></b>	£
<b>Total:</b>	£

<b>Signature:</b>	<b>Date:</b>
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