

Recall petition spending and donation return notes

You should read the related guidance before completing this form.



Who this form is for:

Registered petition campaigners who must submit a spending and donations return. It must be completed by the responsible person

This form is for recording the details of recall campaign spending that is used during the regulated period, and the donations you have received towards that spending.

Before completing the form, you should read our [spending and donations guidance](#) for recall petition campaigners.

Explanatory notes

Section 1 and 2 – Details of petition and registered petition campaigner.

Please provide the details requested under this section.

Ask the Petition officer at the local authority to find out the date you were registered and the date the Speaker of the House of Commons was notified of the result of the petition or the date the Petition Officer was notified that the petition was ended early.

Section 3 – Summary of spending and worksheets

We have provided worksheets within the form for details of:

- each spending category - the **blue** tabs
- unpaid spending – the **orange** tab
- disputed claims - the **red** tab

You can find related guidance for petition campaigners [here](#) and the spending and donations return [here](#).

- joint campaigning – the **yellow** tabs

Please indicate using the drop-down lists which worksheets you are submitting and also indicate how many joint campaign worksheets you are submitting.

Use these worksheets to enter the details of the spending under the appropriate category. If you are completing the Microsoft Excel version of this form, you can insert as many rows as you require on each worksheet to record each item of campaign spending.

When you have totalled up the amounts under each category, enter the amounts into the sub-totals rows in tables 3a and 3b.

If you have no spending to report for a category you do not need to attach the worksheet but you **must** enter a zero or nil into the summary of spending table for that category.

The sub-totals for petition spending in section 3a 'Types of payment' and section 3b 'Categories of spending' should be the same. If your totals are not the same, you have made a mistake in your calculations. You should check the information you have provided and your calculations.



Enter a total figure for spending incurred before you registered. This must **not** include any notional spending which should be included in table 3b and the top half of 3a. Enter a total of all joint campaign spending incurred. Your sub-total plus the amounts entered in the second half of table 3a is your total petition spending. This **must** be below £10,000.

The categories of spending allocation are:

A – Advertising

This includes advertising of any nature, e.g. posters or advertisements in newspapers. It includes agency fees, design costs and any costs associated with preparing, producing and distributing advertising.

B – Unsolicited material to electors

This includes unsolicited material addressed to electors, whether addressed or not. It includes design costs and all other costs in connection with preparing, producing and distributing such material.

C – Transport

Transport includes hire costs but excludes the use of personal cars where no charge has been made by the owner.

D – Public meetings

This includes costs in connection with people's attendance at meetings, the hire of premises for the purposes of meetings and the provision of goods, services or facilities at meetings.

E – Responsible person and other staff costs

This includes payment for the services of the responsible person, or anyone else, paid in connection with the petition campaign. This includes staff working on the petition campaign who are paid by the petition campaigner.

F – Accommodation and administration

This includes the general costs of campaign office rental and utilities.

How to complete the spending category worksheets

Each item of spending should be allocated to one category only. Some items will be categorised easily, but others may appear to fit more than one purpose. In these cases you must judge where to put the item.

Generally, items should be placed under the purpose they naturally fall into, e.g. the transport costs of the responsible person should be included under transport even if the transport is in connection with participation at a public meeting.

For every item of spending, please give details of:

- The **item number**. The first payment reported should be '1' and then items should be numbered consecutively on all worksheets. For each payment you are supporting with an invoice, you should put the same number on the invoice. Item numbers need to be unique because they are used to cross-reference with other sections of the form and the supporting invoices/receipts.
 - Indicate if an **invoice** or **receipt** has been submitted. Select 'Yes' or 'No' in the drop-down menu on the Excel spread sheet provided by the Electoral Commission. Invoices or receipts are required for all items over £20 except notional spending.
 - The **item** or **service** used.
 - The **name and address of the supplier** where this is not on an invoice or receipt submitted with the return.
 - The **date** the invoice was paid.
 - The **value** of the item.
-

- The **amount paid**, if this is different from the value of the item. Include nil payments where applicable.
- Indicate whether the item is either a **disputed claim** or an **unpaid claim**. Select 'Yes' or 'No' in the drop-down menu on the Excel spread sheet provided by the Electoral Commission. You will need to provide additional information on items that are disputed or unpaid on the relevant worksheets (the **orange** and **red** tabs).
- Indicate whether the item was incurred as part of a **joint campaign**. Select 'Yes' or 'No' in the drop-down menu on the Excel spread sheet provided by the Electoral Commission. If you select 'yes' for any item of spending, you must also give details of that spending in the joint campaign worksheet (the **yellow** tab).

Remember to indicate when you are entering a nil payment.



Unpaid claims

Use the unpaid claims worksheet (the **orange** tab) to report invoices you did not receive within **21 days** of the end of the regulated period.

Please ensure you use the same item number to cross-reference the two entries in the different worksheets. You should include the details of the court to which you have applied, or will apply, to make a late payment.

Disputed claims

Use the disputed claims worksheet (the **red** tab) to report invoices you did not pay within **28 days** of the end of the regulated period.

Please ensure you use the same item number to cross-reference this entry with the entry on the spending category worksheet. You should provide information about the nature of the dispute and any action that you are taking.

Joint campaigning

You must report spending incurred by your joint campaign partners in your spending return. Use the joint campaign worksheet (the **yellow** tab) to give details of spending incurred by you in joint campaigns. You must give a total figure for pre-registration spending and itemise spending incurred after registration and all notional spending.

These worksheets are for you to provide to your joint campaign partners to submit with their return. They must do the same and you must submit their joint campaign worksheets with your

return. This worksheet is **not** to be submitted with your own return (as all your spending must be reported using the **blue** tabs).

Fill out one worksheet for each joint campaign you spent money in and print one copy for every joint campaign partner you worked with to submit with their spending return.

You do **not** need to provide invoices for spending incurred by your joint campaign partners.

Section 4 – Donations and the worksheets for reporting donations

Political parties (who are not 'minor' parties) registered as petition campaigners are not required to submit a donations return. This means they do **not** have to fill out section 4 of the return; the accepted and rejected donations worksheets or sign the donations declaration.

All other registered petition campaigners must complete section 4; sign the donations declaration, (even if you do not have any donations to report) and complete the accepted and rejected donations worksheets (the **green** tabs) if you have any donations to report.

Please indicate using the drop-down lists which worksheets you are submitting. If you have no accepted or rejected donations to report, you do not need to submit the relevant worksheet but you **must** enter zero or nil in the corresponding box in section 4.

Donations you have accepted

Use the donations worksheet to report about any donations from permissible sources that are more than £500.

For each donation accepted by the responsible person, you must provide the following details:

- the full name of the donor – if it is a registered company, you must report the company registration number
- the address, or registered address, of the donor
- the status of the donor (i.e. individual/company/trade union). You can select one from the drop down list of permissible donors on the Excel spread sheet.
- the date you received the donation
- the date you accepted the donation

For more information on donations see our [spending and donations guidance](#).

- the amount (for a monetary donation) or value (for a non-monetary donation)
- the type of the donation. If the donation was a non-monetary donation, please provide a description of the goods and services that were received e.g. advertising/premises/hospitality

Donations you have rejected

Use the rejected donations worksheet to report about any donations you have not accepted. For each unidentifiable donation or impermissible donation received by the responsible person, you must provide the following details:

- the name of the donor, unless this is not known, in which case enter 'unknown'
- the donor's address, but if you do not know this then enter 'unknown'
- the date the donation was received
- the amount or value of the donation
- the type of the donation. If the donation was a non-monetary donation, please provide a description of the goods and services that were received e.g. advertising/premises/hospitality
- the date when and manner in which you returned the donation

Examples of non-monetary donations include:

- free or discounted use of office space
- a gift of leaflets
- free hire of transport
- discounted design of website

Section 5 – Declarations

The responsible person **must** sign the spending declaration.

If you have completed section 4 of the return, the responsible person **must** also sign the donations declaration.

Completing and returning this form to the Petition Officer

The responsible person must complete and return the form to the Petition Officer. The form must be submitted within 30 days of the end of the regulated period.

When using the Excel spending return form, to print the entire spending return (including the worksheets), select the 'Print entire workbook' option on the 'Print Options' page.



Where can I get further advice?

You can contact us for advice on imprints, spending and donations using the contact details below. Please contact the petition officer for details on registering.

Call us on 0333 103 1928 or 0333 103 1929 (Welsh)

Or email

- England: pef@electoralcommission.org.uk
- Scotland: infoscotland@electoralcommission.org.uk
- Wales: infowales@electoralcommission.org.uk
- Northern Ireland:
infonorthernireland@electoralcommission.org.uk

Visit us at <http://www.electoralcommission.org.uk>

We welcome feedback on our guidance – just email us at:
pef@electoralcommission.org.uk.
