



MELBOURNE WEST SUB-BRANCH

LOCAL INSTRUCTION NO 1 EXPENSE CLAIMS FOR VOLUNTEERS

Introduction

1. The purpose of this AI is to advise Melbourne West Sub-Branch (the Sub-Branch) volunteers how to claim reimbursement when appropriate and to provide guidance about what are considered 'reasonable expenses' for claims purposes.
2. The Sub-Branch does not employ staff and so is heavily reliant on volunteers to perform all work functions. To ensure these volunteers are not financially disadvantaged, the Sub-Branch recognises that volunteers may be reimbursed reasonable costs incurred in the performance of business on behalf of the Association.

Detail

Expenses for Reimbursement

3. In the spirit of volunteering, it would be appreciated that claims for travel be limited to a minimum of 10km one way, and miscellaneous items of more than \$5 each.
4. The Melbourne West Sub-Branch is responsible for reimbursement of expenses when the volunteer is undertaking approved work activities on behalf of the Sub-Branch.
5. Approved work activities means activities directly related to the position to which the person is elected (ie President etc) or appointed to by the Sub-Branch Executive (ie Welfare Officer etc)
6. From time to time other members of the Association may be co-opted to do work on behalf of the State Branch. In these circumstances those co-opted personnel may also be reimbursed from State funds for expenses incurred while undertaking approved activities.

Reasonable Expenses/Examples of Claims

7. Examples of claims considered reasonable are:

a.	Travel by Public Transport
	The actual costs of using public transport - airline, train or bus tickets are to be produced as receipts when travelling on approved business.
b.	Accommodation
	When a volunteer in the normal course of Sub-Branch activities is required to sleep away from their residence overnight, low cost accommodation is to be sought and only 'bed and breakfast' expenses are to be claimed. Where discounts are obtained the Sub-Branch is to be given the benefit when claims are submitted.

c.	Telephone/Internet Expenses
	Actual telephone and or internet costs associated with the day to day activities of the Sub-Branch may be claimed. The claim must be accompanied by a copy of the relevant telephone account with those expenses incurred in the performance of Sub Branch business highlighted or for internet accounts, a previous and current account showing the differential.
d.	Parking
	Expenses incurred by the use of commercial parking facilities in the performance of Sub-Branch business may be reimbursed providing a receipt from the parking facility accompanies the claim. If a parking fine is incurred on an expired meter this will only be reimbursed if the volunteer can demonstrate an unavoidable delay while attending to Sub-Branch business.
e.	Minor Administrative Expenses.
	Minor expenses incurred in the administration of Association business may be reimbursed upon the production of receipts accompanied by a written explanation of why the expenses were incurred.
f.	Official Function Costs.
	When members of the Executive and their partners are required to represent the Sub-Branch at official functions, all reasonable costs associated with the function will be considered for reimbursement.
g.	Use of Private Vehicle
	When a member of the Sub-Branch uses their private vehicle in the performance of official duties on behalf of the Sub-Branch, the member is entitled to claim a mileage allowance at the rate determined by the Sub-Branch at a Committee Meeting and recorded in the minutes of the meeting.
h	Unusual Claims.
	Expenses incurred for any other activity for which reimbursement is sought, can be claimed by producing receipts and a detailed written explanation to the Sub-Branch Executive for consideration.

Claims Procedure

8. Claims must be submitted directly to the Sub-Branch Treasurer using the form titled "Welfare Related Expenses Reimbursement Invoice" at Annex A accompanied by any legible receipts, and if required, a detailed legible written justification.
9. The Sub-Branch Treasurer is required to ensure the propriety of expenditure. Reimbursement claims submitted without supporting documentation or not signed (where applicable) will be returned to the claimant. There will be no reimbursement made on a verbal basis.
10. Upon receipt of the relevant documentation, the Sub-Branch Treasurer may either make payment by direct payment to the claimant's bank account or will forward a reimbursement cheque to the claimant as soon as possible. If there is to be any delay, for any reason, the claimant will be advised.
11. Persons submitting claims should note that their signature on the invoice is interpreted as meaning that the expenditure incurred was associated with approved Sub-Branch activities

Claims Frequency

12. As a general rule, claims for reimbursement should be submitted on a monthly basis, however, claims may be submitted more frequently if the claimant wishes to do so. If a claim is submitted for a period exceeding one month after the activity, an explanation of why the claim was not submitted within one month of the expense being incurred will be required. This explanation may be verbal or in writing.
13. Should insufficient funds be available to meet the expenses being claimed, the Treasurer will hold claims until funds are available. Should that be the case, the claimant will be advised.

Conclusion

14. Reimbursement of expenses is based on work performed on behalf of the Sub-Branch and it is the responsibility of the claimant to ensure all necessary documentation is presented when submitting a claim for reimbursement.