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The Bee-Leaf Academy Reimbursement Policy

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Drafted By	Roni McCorkle	Review Date	01/07/2022
Person Responsible	President		

INTRODUCTION

Directors, employees or volunteers may, on occasion, be required to pay expenses consequent on their employment out of their own pockets. Under certain circumstances, as outlined in this policy, these expenses may be reimbursed by the organisation.

PURPOSE

The purpose of this policy is to spell out under what circumstances reimbursement of expenses may occur on behalf of the Bee-Leaf Academy (“the Academy”) and the process for doing so. This policy relates to Directors, employees and volunteers acting on authorised Academy business.

POLICY

The Academy will reimburse its staff (including volunteers) expenses incurred by them on behalf of the Academy or in the course of Academy business so long as such expenses are:

- (1) Reasonable and
- (2) Authorised.

Reimbursement of reasonable but unauthorised expenses may be made on an *ex gratia* basis at the discretion of the President in exceptional circumstances only.

Directors, employees and volunteers incurring authorised expenditure must, wherever possible, receive, retain and produce receipts, invoices, vouchers, tickets, or other evidence of such expenditure.

RESPONSIBILITIES

It is the responsibility of President and Academy Treasurer to ensure that:

- Directors, employees and volunteers are aware of this policy;
- Any breaches of this policy coming to the attention of President or Academy Treasurer are dealt with appropriately.

It is the responsibility of the all Directors, employees and volunteers to ensure that their applications for reimbursement conform to this policy.



PROCESS

Directors, employees and volunteers may claim reimbursement in the following circumstances:

Accommodation expenses

- Directors, employees and volunteers will be reimbursed for moderate accommodation expenses, considering all of the circumstances;
- Directors, employees and volunteers will not be reimbursed for items of a personal nature charged to a hotel account;
- When accommodation is provided by a Director's, employee's or volunteer's friend or relative, to whom the employee or volunteer gives money or a gift as compensation or as a sign of appreciation, the Directors, employees and volunteers may claim an overnight accommodation expense in accordance with per diem rates, as shall be determined by the organisation from time to time.

Meals

- Directors, employees and volunteers will be reimbursed for reasonable and appropriate meal expenses actually incurred while on Academy business.

Provision of hospitality

- Directors, employees and volunteers will be reimbursed for hospitality expenses incurred in the course of Academy business, as appropriate.
- Appropriate hospitality charges include events hosted or sponsored for the purpose of promoting the Academy's work or enhancing its image, and include meals that are related to the transaction of Academy business.
- When Directors, employees and/or volunteers dine together while on Academy business, it is appropriate for the senior Director or employee to arrange payment and submit the claim for reimbursement.

Travel expenses

- Directors, employees and volunteers will be reimbursed for the most direct and economical mode of travel available, considering all of the circumstances;
- Directors, employees and volunteers will not be reimbursed for additional costs incurred by taking indirect routes or making stopovers for personal reasons;
- Use of a Director's, employee's or volunteer's own vehicle for work-related travel will be reimbursed by way of an all-inclusive mileage allowance, as shall be determined by the organisation from time to time, in line with the Australian Tax Office guidelines;
- Trip cancellation insurance is eligible for reimbursement.

Directors, employees and volunteers incurring authorised expenditure must retain all relevant receipts, invoices, vouchers, tickets, or other evidence of such expenditure and submit them to the Finance Officer with a properly completed copy of the reimbursement form (see Appendix below). The completed form must be signed by the applicant.

The President and Treasurer are responsible for determining if the expenses being claimed are reasonable given the circumstances, and for ensuring they are charged against the appropriate



account, and that any requirements under the Fringe Benefits Tax legislation have been met.

Claims that have not been properly prepared, authorised, or supported by adequate documentation will be returned to the claimant and the reasons will be given for not processing the claim.

The Academy will not reimburse staff or volunteers for

- Unauthorised expenses;
- Expenses claimed by an employee as a tax deduction;
- Expenses normally recoverable from a third party;
- Claims for purchases that are required to be made under an Academy purchase order;
- Expenses that are not incurred for business purposes;
- Late payment interest on credit cards; or
- Parking, traffic, or other fines and penalties.

RELATED DOCUMENTS

- Code of Ethics
- Conflict of Interest Register

AUTHORISATION

John McCorkle

President



APPENDIX – Bee-Leaf Academy Reimbursement of Expenses Claim Form

Instructions: Complete form by including:

- the date the expense was incurred;
- details of items being claimed; and
- the cost of each item.

Date	Item details	Amount

The completed form should be forwarded with receipts attached to:

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