Volunteer Expense Reimbursement Guide

A guide for Volunteers

Purpose

This document provides Heart Foundation Volunteers ("volunteers") with guidance on how expenses can be reimbursed for approved out of pocket expenses incurred during official Heart Foundation activities.

Eligibility

Volunteers for the purposes of this document are those people who are formally registered with the Heart Foundation and actively engaged to perform unpaid activities that are outlined in their position description(s).

Our approach

The Heart Foundation is committed to ensuring you are not disadvantaged financially when volunteering your time for us.

We will reimburse reasonable out of pocket expenses incurred when performing authorised tasks and activities associated with your volunteer role/s. These payments are not remuneration or wages.

Eligible expenses for reimbursement

Reimbursement is only available for pre-approved expenses related to your volunteer duties that are outlined in your role description.

Below is an outline of common expenses that are eligible for reimbursement:

Expense Type	Details
Travel/Transport/Mileage	These expenses must follow ATO approved rates and be related to your approved and pre-planned volunteer activities. Travel must be pre approved with your entitlement outlined to you in advance.
Meals	Meal expenses will be reimbursed if you have been asked to volunteer for a set duration and the program has outlined this entitlement to you in advance. Reimbursements for meals will be capped at the ATO published standard rate of the day. Your supervisor will share the rates payable for meals before the volunteer activity. ATO Reasonable Travel Allowances - Taxrates.info
Materials/supplies	We reimburse items that you have been approved to purchase for an event or activity by your volunteer supervisor.

Reimbursement process and timeframe

Step	Action
1.	Your Supervisor will confirm if you are eligible for expense reimbursements during induction and training (e.g. mileage associated with role) or when an expense is about to be incurred (e.g. you need to purchase supplies for an activity).
2.	You will be asked to retain the receipt/s or record your mileage.
3.	Please complete an EFT request form. The form will be sent to you by your Supervisor. Please note if the claim is for expenses, meals or travel (noting location from-to and km travelled). Return the form to your Supervisor by email.
4.	Your supervisor will call you to verify the bank details that you supplied on the EFT request form.
5.	Your supervisor will contact you to confirm the status of your application for reimbursement. Reimbursed funds will be paid by bank transfer within 4 weeks*. **Please speak to your Supervisor if this timeframe is not suitable for your personal circumstances.*

Support and further information

Please contact your Supervisor for further information relating to expense reimbursements.

Review and Document Control

*(This section is **only** to be completed by the Risk and Assurance Team)*

This guide shall be subject to periodic review to ensure its relevance, accuracy, and effectiveness in achieving its stated objectives. At minimum this guide will be reviewed every three years and approved by the Financial Controller.

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