



Fun Reading  Reading for Life

# Reimbursement Policy

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Version number	V1
Last review date	20/11/2025
Review cycle	2 years
Next review date	20/11/2027

## 1. Purpose

The purpose of this policy is to provide a clear framework for the reimbursement of reasonable out-of-pocket expenses incurred by Volunteers, Staff and Directors (or Responsible Persons) of the charity.

This policy aims to ensure that any reimbursements:

- are incurred in connection with the charity's business,
- are processed efficiently and in line with ACNC and ATO requirements,
- are reasonable, properly authorised, documented and accounted for, and
- do not amount to remuneration or an improper private benefit to Volunteers, Staff or Directors (unless specifically authorised).

## 2. Scope

This policy applies to:

- All Story Dogs volunteers, including Volunteer Dog Teams, Coordinators and Support Central Volunteers
- Paid staff
- Directors / Responsible Persons

## 3. Definitions

- **Director / Responsible Person** means a person who serves on the board (or equivalent governing body) of the charity.
- **Charity Business** means activities undertaken by the charity in pursuit of its charitable purpose – for example, but not limited to, reading sessions, school meetings, volunteer training, board meetings, strategy sessions, conferences, committee work, representation of the charity at external events (if approved).



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- **Out-of-Pocket Expense** means a documented cost incurred personally (not paid or reimbursed upfront by the charity) in performing charity business, which is reasonable and directly connected to that work.
- **Reasonable** means appropriate in the context of the charity's size, resources, the nature of the expense, and what a prudent person would consider appropriate in comparable circumstances.

## 4. General Reimbursement Principles

- **No Out-of-Pocket Costs:** Volunteers, Staff and Directors should not be financially disadvantaged when undertaking duties for the charity.
- **Approval Required:** Wherever possible, expenses must be approved in advance by a relevant coordinator or staff member.
- **Receipts Required:** All claims must be supported by itemised receipts, tax invoices, or evidence of payment.
- **Reimbursement Form:** Reimbursement claims should be submitted on the Story Dogs standard expense reimbursement form either hard copy or electronically.
- **Timely:** Claims must be submitted within 30 days of the expense.
- **Extraordinary Claims:** Occasionally unusual or one-off expenses (e.g. attending a conference or event, unexpected supplies) may occur. These will be considered on a case-by-case basis with appropriate approval.
- **Review of Claims:** The Treasurer (or other designated finance/administration lead) will review claims for compliance with this policy and guide the board in monitoring the total reimbursement costs as part of the charity's financial oversight.

## 5. Eligible Expense Categories & Limits

### Travel:

- Reimbursement applies for travel reasonably required to attend approved charity business.
- Economy class travel is to be used unless otherwise approved by the Chair or board (e.g., for remote location, disability or other special reason).
- Car travel will be reimbursed as per relevant Australian Taxation Office (ATO) mileage allowance guideline.



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- Transfers (taxi / uber) to and from airports and event venues

## **Accommodation:**

- If the Volunteer, Staff member or Director is required to stay overnight the charity will reimburse a mid-range hotel accommodation

## **Meals and incidentals:**

- Where overnight accommodation is required or a meeting extends through meal times, reasonable meal costs will be reimbursed.

## **Other approved costs:**

- Parking, tolls, public transport or rideshare costs incurred in connection with attending a charity meeting or business.
- Pre-approved conference or event registration fees, if attendance by the Director has been authorised by the board as part of charity business.

## **Limits and thresholds:**

- No single reimbursement claim should exceed AUD \$1,000 without board approval
- All reimbursements above AUD \$1000 should be flagged in the board's finance report and accompanied by a brief description of purpose (e.g., travel to interstate strategy meeting).

## **6. Non-Eligible Costs**

The following are **not** eligible for reimbursement under this policy:

- Any expense that is not directly connected to board or charity business
- Fines or penalties (e.g., traffic infringements).
- Costs of spouse/partner/guest travel or accommodation, unless expressly approved by the board in advance (and only if that attendance is legitimately part of the charity business).
- Membership fees of professional associations or clubs, unless specifically authorised as part of the Director's role in the charity and approved by the board.
- Any expense that is not substantiated by an itemised receipt, invoice or explanation, or which fails to comply with this policy.
- Upgrades or luxury items not justified by business needs



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- No reimbursement is allowed for alcohol.
- Vet bills – although a subsidy is provided for the annual vet check
- Dog grooming, dog food, and other equipment for managing your dog
- Pet insurance

## 7. Timeframes for Submission and Reimbursement

- Reimbursement claims must be submitted within **30 calendar days** of the date the expense was incurred.
- All claims received after **90 calendar days** of the expense date will ordinarily **not** be reimbursed unless approved by the board with a valid reason for the delay.
- Once validated and approved by the Treasurer (or delegate), the reimbursement will be paid within **15 business days** of the claim being approved (or next scheduled payment run).

## 8. Taxation, Fringe Benefits and Accounting Treatment

- Reimbursements under this policy are not remuneration for the Director's services, but repayment of actual out-of-pocket expenses incurred in the performance of their role. They should not give rise to an additional taxable payment to the Director (provided they are genuine and substantiated).
- Reimbursements should be recorded in the charity's financial accounts under an appropriate expense category and reviewed.

## 9. Transparency and Disclosure

- The board will ensure that this policy is available to all Volunteers, Staff and Directors
- The charity will disclose any reimbursed expenses in its Annual Information Statement (AIS) or annual report as required by the ACNC (especially in relation to related-party transactions). ([ACNC](#))
- The board should review annually the actual expenses reimbursed to Directors and assess whether they remain reasonable in the context of the charity's size, activities and financial position.

## 10. Review of the Policy



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- This policy will be reviewed every **two years** or more frequently if there is a change in regulatory requirements, the charity's business model, or other circumstances that merit a review.
- Any amendments must be approved by the board and documented in the minutes.

## 11. Responsibility

- The Chair is responsible for ensuring this policy is brought to the board's attention and understood by all Directors.
- The Treasurer (or Finance Committee) is responsible for reviewing reimbursement claims for compliance, reporting the aggregated results to the board, and monitoring overall costs relative to budget.
- Volunteers, Staff and Directors are responsible for ensuring that their claims comply with this policy, are supported by appropriate documentation, and are submitted within the timeframes specified.

## 12. References & Regulatory Links

- Story Dogs – Claim form link  
<https://www.cognitofirms.com/STORYDOGS1/StoryDogsCoordinatorReimbursementAndTravelClaimForm>
- ACNC – Remunerating Responsible People (includes guidance on reimbursement vs remuneration): <https://www.acnc.gov.au/tools/guides/remunerating-responsible-people> (ACNC)
- ACNC – Managing Charity Money: <https://www.acnc.gov.au/tools/guides/managing-charity-money-guide-for-responsible-people> (ACNC)
- ACNC – Related Party Transactions guidance: <https://www.acnc.gov.au/tools/topic-guides/related-party-transactions> (ACNC)
- ASIC – Charities registered with the ACNC: <https://www.asic.gov.au/for-business/running-a-company/charities-registered-with-the-acnc> (ASIC)