

Reimbursement of Expenses Policy

The purpose of this policy is to explain under what circumstances reimbursement of expenses may occur on behalf of U3A Sunshine Coast and the process for submitting claims. The policy guidelines relate to volunteers, tutors, management committee members and members acting in an authorised position for the business of U3A Sunshine Coast.

While it is against the rules of our Constitution for any member to receive financial benefit from participating in U3A activities, members should not be out of pocket as a result of an activity authorised to be carried out, and reasonable expenses will be covered.

About U3A Sunshine Coast

OUR VISION

An association of healthy, happy, empowered and socially integrated seniors.

OUR MISSION

Facilitate physical, intellectual, and social activities that promote wellbeing for seniors on the Sunshine Coast.

OUR VALUES

- **Respect** - for all people we encounter in our daily lives.
- **Inclusiveness** – a welcoming, friendly culture that encourages seniors to engage in programs that are affordable.
- **Creativity** – new ideas and innovative practices that enrich people’s lives.
- **Accountability** – the highest level of open and good governance.

OUR GOALS

- Communicate and market U3A internally and externally.
- Provide members with varied activities and learning opportunities.
- Develop, nurture and sustain tutors and volunteers.
- Establish new external partnerships and nurture existing ones.
- Ensure a viable and sustainable organization.

Sunshine Coast U3A is part of a worldwide voluntary organisation, with each group operating autonomously. It is an association of people linked by the common desire to learn and engage in activities with others having similar interests.

U3A in Australia began in 1984 and we were formed in 1986. We have over 2000 members and our area follows the Sunshine Coast Regional Council LGA extending from Caloundra in the south to Coolool in the north and from the range to the coast. We are attached to, but not academically part of, University of the Sunshine Coast, Sippy Downs.

U3A Sunshine Coast is a self-managed, not for profit organisation. Members cannot benefit financially from U3A, thus all members who support the activities of the organisation and our members do so in a voluntary capacity. Our programs and courses are developed and run for our members, who can join as many courses and activities as they wish, subject to availability.

Reimbursement of Expenses

U3A Sunshine Coast will reimburse the following expenses while a member is acting on authorised tasks. An [expense claim form](#) with supporting documentation must be submitted to the [Treasurer](#) for the reimbursement.

Travel using own vehicle - \$0.35 per kilometer:

- U3A Member travel related expenses on behalf of U3A for an authorised task.
- For tutors, travel from your place of residence to your class by the most direct route.
- For Management Committee members, travel to attend committee meetings and official functions.
- For volunteers carrying out authorised tasks for the organization.

Parking \$3 per half day, will be paid for parking at UniSC by tutors, office volunteers and visiting lecturers who do not have a parking pass. **Note:** this reimbursement is only for UniSC

Reimbursement of Course Materials. Tutors will be reimbursed up to \$100 per semester for course related material to be used in the presentation of information to class attendees.

Copying/Printing Expenses. Tutors are encouraged to send course material to class members by email for their use during class. Tutors are encouraged to use the Toshiba copier in the Tutors room for large scale or colour copying or ask the Office Volunteers to do the printing. Sufficient time should be allowed for the production of materials. Members are encouraged to use black and white copying where possible.

Purchase of computers or tablets, etc. The purchase of electronic devices for use in delivering U3A courses and activities are to be purchased by U3A Sunshine Coast Equipment Coordinator, which requires authorisation prior to purchase as per the financial delegation table in this document.

Unauthorised expenses. Other out of pocket expenses, not approved by the Management Committee, will not be reimbursed.

Expense Claims. Expense claims will only be reimbursed if the request and information is provided to the treasurer on a [expense claim form](#) with supporting documentation attached. It is preferable to send the claims via email to treasurer@u3asunshine.org.au.

Claims are processed monthly, and members are encouraged to send claims in a timely manner, not to accumulate claims, preferably each semester. Claims for prior years will be considered by the Management Committee but with the right to refuse prior year claims.

Financial Delegation, a financial delegation table is attached to this policy for clarification.

The tables in this document provide tutors with guidelines as to who to advise when incurring tutor related expenses.

Value	Delegation Level 1	Delegation Level 2	Delegation Level 3
Up to \$100	<p>The Tutor is authorised to incur this level and advise the Course coordinator (email courses@u3asunshine.org.au of the expenditure if the expense is not travel related), then send a claim to the Treasurer</p>		
Between \$100 and \$500		<p>The Tutor is to contact the Treasurer prior to incurring the expenditure.</p> <ol style="list-style-type: none"> 1. The Treasurer will advise the tutor if this expenditure is ok to proceed with <p style="text-align: center;">OR</p> <ol style="list-style-type: none"> 2. The Treasurer will advise the tutor that the expenditure will need to go the committee for approval <p>If the tutor is advised to go ahead with the expenditure the tutor will advise the course coordinator of the expenditure and send their claim to the Treasurer.</p> <p>If committee approval is required the Treasurer will advise the tutor to proceed if approval obtained, then send their claim to the Treasurer.</p>	

Value	Delegation Level 1	Delegation Level 2	Delegation Level 3
Between \$501 and above			<p>The Tutor is to contact the Treasurer prior to incurring the expenditure.</p> <p>The Treasurer is to advise the Course coordinator and the equipment officer of the expenditure, then take this request for expenditure to the committee for approval.</p> <p>The Treasurer will advise the tutor to proceed if approval is obtained.</p>

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