

Policy 8.2.5
Attachment A

Oregon Nurses Association
18765 SW Boones Ferry Rd #200
Tualatin Or 97062

Bargaining Unit Grant: Request for Disbursement of Funds

Date: _____ Amount: _____

Name of Facility where Bargaining Unit Located:

Please issue check as follows:

Name: _____

Address: _____

Description of Expense:

Invoices/bills and receipts must be attached in order for request to be processed.
Forms must be submitted within one month of expenditure to be considered for reimbursement. Allow at least two weeks for processing.

Request authorized by: _____
(Unit Chairperson)

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Office Use Only	Date Rec'd	Fund Balance
	Account Code 10-20-5810	Transaction
	Approval:	New Balance

(More Information on Back)

Your bargaining unit may access this money in one of three ways:

1. Complete the bargaining unit grant fund form and attach invoices for ONA to pay bills directly for the bargaining unit. Be sure to include address and vendor invoice.
2. Complete the bargaining unit grant fund form and attach receipts documenting expenses incurred by individual(s) or the bargaining unit and ONA will reimburse the individual(s) or bargaining unit. **Receipts are required.**
3. In exceptional cases when monies are needed in advance to complete a project or activity, funds may be advanced to an individual ONA member of the bargaining unit. This individual is responsible for submitting receipts and other required documentation to ONA to reconcile the advance. To receive such an advance, the **bargaining unit grant fund form** and a **financial status form** must be submitted.
4. Demonstration Projects and Constituent Associations **must submit a financial status form and a bargaining unit grant fund form** to the Cabinet prior to any funding allocation by the cabinet.

Labor law and generally accepted accounting principles require that ONA be able to account specifically for any use of dues monies. ONA's auditor monitors the bargaining unit assistance grants to ensure that staff has received the appropriate receipts required. If these documents are not available for review by the auditor, a citing will be made in the auditor's report. Sending money directly to bargaining units is not in keeping with ONA's status as a labor organization because of the bonding of officers and individual audits that would be required by labor law.

The Cabinet on Economic and General Welfare will approve monies based on need for the following activities:

- ❖ Reimbursement to leaders/negotiators for expenses.
- ❖ Unit supplies, books, and equipment
- ❖ Unit newsletters and other communication expenses
- ❖ Unit correspondence
- ❖ Family care for unit business
- ❖ Phone expenses for unit business
- ❖ Advertisements taken out in support of unit negotiating goals
- ❖ Education for members of units to enable them to fulfill unit responsibilities

Please advise the Cabinet if you have a request that does not fall within the categories listed above; your request will be considered. If you have any questions about the bargaining unit grants, please contact your Labor Representative, Administrator of Labor Relations or a member of the Cabinet on Economic and General Welfare.