



Australian Government

Independent Parliamentary Expenses Authority

IPEA EDUCATION PROGRAM WORKBOOK

About IPEA

LEARNING AREA

1





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Learner Induction:

Please ensure you have an appropriate learning environment before undertaking any training.

An appropriate learning environment would include the following:

- A quiet and undisturbed place
- A well-lit area
- A work station or suitable arrangements
- Comfortable temperature/climate conditions
- Access to amenities
- Access to lap-top, mobile phone—or portable device with internet connection
- Access to IPEA instructor or advice line for assistance
- Familiarity with emergency exits and procedures.

Learning Area Outline Descriptor:

This Learning Area will focus on the role and functions of IPEA, as well as the expectations between IPEA and their clients (parliamentarians and their staff) in fulfilling their roles.

This Learning Area will provide a range of information to the learner on IPEA's role and functions.

The Learning Journey:

This Activity Objective will give the learner:

- An understanding of how IPEA came to be
- An understanding of the role and functions of IPEA in helping parliamentarians and their staff in their roles

- An insight into the timelines that are established within IPEA's business as usual towards their clients
- An improved professional relationship between IPEA and its clients
- Clarity, by removing any confusion the learner may have about IPEA's role and functions.

Targeted Learning Outcomes:

By the completion of this Learning Area, the learner will know:

- How IPEA came to be
- When IPEA was established
- What the IPEA acronym stands for
- Who IPEA's CEO is
- What is IPEA's role
- What the 5 key functions of IPEA are
- What to expect from IPEA.



You can contact IPEA for advice via:

Phone: (02) 6215 3000

Email: enquiries@ipea.gov.au



Section 1

How IPEA came to be

In 2015 a parliamentary committee was set up to propose models for fundamental reform in regards to a parliamentary entitlements system.

In 2016 the committee released a 'review paper' outlining options for an independent parliamentary entitlements system.

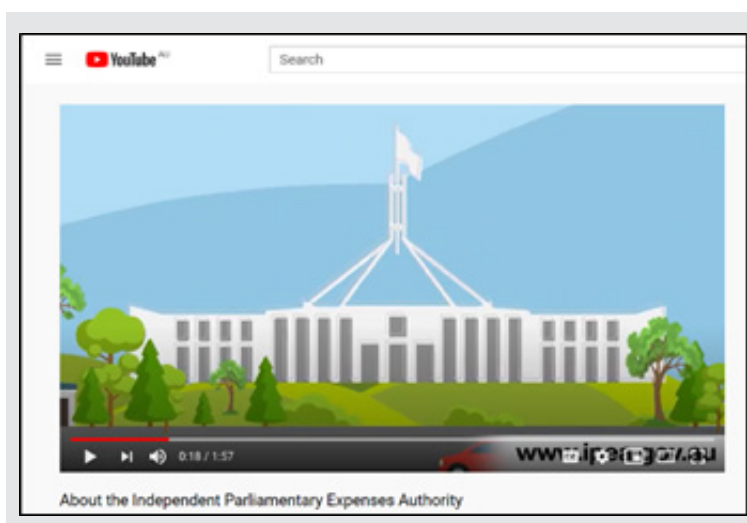
The review contained 36 recommendations including:

1. A principle-based system should be introduced
2. Parliamentarians should be subject to reasonable standards of auditing
3. All travel rules for parliamentarians should be streamlined into a single act of Parliament.

As the Australian public continued to scrutinise parliamentarian's expenditure, and there continued to be a perception that in some instances taxpayers' money for the purposes of travelling was being misused, the Australian Government in early 2017 announced the establishment of IPEA.

In announcing the establishment of IPEA, the government emphasised the importance of:

- Spending taxpayer funds carefully, ensuring work related expenditure is ethical, prudent and cost-effective
- Bipartisan support for a new organisation and approach was required
- A move in the language to refer to parliamentary entitlements as 'work expenses' similar to the language used to claim those type of expenses in the private sector.



Reference: YouTube - About The Independent Parliamentary Expenses Authority
<https://www.youtube.com/watch?v=xa7XsQ5PeiA&feature=youtu.be>

Learning Activity 1.

Q1. True or False. The establishment of IPEA received bipartisan support?

TRUE	FALSE
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Q2. The review made how many recommendations in total?

3	12	24	36
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Q3. Complete these recommendation statements by filling in the missing words.

'A core recommendation being that a _____ - _____ system should be introduced.'

'The review recommended that all travel rules for parliamentarians should be streamlined and consolidated into a _____ act of parliament.'



Section 2

The Agency – IPEA’s key functions

IPEA (the Independent Parliamentary Expenses Authority) was established on 1 July 2017, as an independent agency under the *Independent Parliamentary Expenses Authority Act 2017*.

It is led by a CEO (Annwyn Godwin) and Members of the Authority. The Members include the President of the Remuneration Tribunal and up to four additional independent Members appointed by the Governor-General.

Our function’s: IPEA administers and advises on travel expenses and travel allowances. IPEA monitor, report on and audit all parliamentarians’ work resources.

IPEA’s 5 functions include:

Personal advice*

We provide personal advice to parliamentarians and their staff on travel related queries.

Administering

We administer travel expenses and travel allowances for parliamentarians and their staff.

Reporting

We provide regular reports on all current and former parliamentarians’ use of work resources including staff travel.

Assurance

We provide assurance through post payment checking and a range of assurance reviews. We audit parliamentarians’ work expenses and the travel expenses of their staff.

Monitoring

We monitor the travel expenses and travel allowances of parliamentarians and their staff.



Note: Personal advice* is provided by IPEA to parliamentarians and their staff on travel related queries. Personal advice provided by IPEA is guided by the Parliamentary Business Resources (PBR) Act and:

- All requests for personal advice are exempt from release under the *Freedom of Information Act 1982 (FOI Act)* along with the personal advice itself
- Is provided with as much detail as possible, taking into account the details provided
- Includes a Yes / No answer wherever possible
- Can be in the form of a Travel Advice Certificate (TAC) on request.

What is a TAC?

A Travel Advice Certificate (TAC) provides parliamentarians and their staff with formal written advice about planned travel. A TAC provides clear advice on whether specific travel meets or does not meet the requirements of the PBR framework **before** travel is undertaken. A TAC is signed by IPEA's CEO.

Reference: IPEA Personal Advice Factsheet:
https://www.ipea.gov.au/sites/default/files/personal_advice_fact_sheet.pdf

Learning Activity 2.

Q1. The IPEA acronym is an abbreviation of what 4 words?

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Q2. Who is Annwyn Godwin? _____

Q3. Please insert the correct word corresponding to the relevant IPEA role?

We _____ the travel expenses and travel allowances of parliamentarians and their staff.

Manage	Monitor	Manipulate
---------------	----------------	-------------------

We provide _____ advice to parliamentarians and their staff on travel related queries.

Personal	Legal	Private
-----------------	--------------	----------------

We provide _____ reports on all current and former parliamentarians' use of work resources including staff travel.

Incomplete	Sporadic	Regular
-------------------	-----------------	----------------

We _____ travel expenses and travel allowances for parliamentarians and their staff.

Administer	Maintain	Undertake
-------------------	-----------------	------------------

We provide _____ through post payment checking and a range of assurance reviews. We audit parliamentarians' work expenses and the travel expenses of their staff.

Counselling	Assurance	Rulings
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Section 3

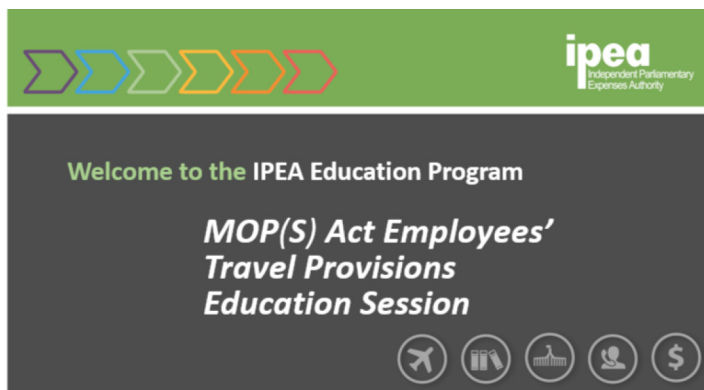
IPEA Education

IPEA provides educational opportunities and resources to parliamentarians and their staff.

We have recently updated and revamped our Education Program to provide a greater blended range of learning materials and resources. Based on IPEA's client interactions since its establishment, our in-house subject matter experts identified nine Learning Areas, which will form the basis of our training program.

<ul style="list-style-type: none"><input checked="" type="checkbox"/> Workbook #1 About IPEAWorkbook #2 Framework parliamentariansWorkbook #3 Travel parliamentariansWorkbook #4 Travel family reunionWorkbook #5 Travel international parliamentarianWorkbook #6 Travel staffWorkbook #7 BudgetsWorkbook #8 ReportingWorkbook #9 Assurance	<ul style="list-style-type: none">LA1 Lesson Plan About IPEALA2 Lesson Plan Framework parliamentariansLA3 Lesson Plan Travel parliamentariansLA4 Lesson Plan Travel family reunionLA5 Lesson Plan Travel international parliamentariansLA6 Lesson Plan Travel staffLA7 Lesson Plan BudgetsLA8 Lesson Plan ReportingLA9 Lesson Plan Assurance
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IPEA has also created a set of Power-point Presentations to cater for the varying needs of our clients. Our revamped Power-point Presentation can now be split to serve more than 20 audience groups.



We have maintained our award winning IPEA-ED online training site. This site holds 6 modules, each module takes around 10 minutes to complete. To access IPEA-ED please enter www.ipea.gov.au/ed into your web-browser.

We recommend at a minimum, that all new staff complete module 3 so they become familiar with their own travel provisions.

In addition to the services listed above, parliamentarians and their staff can request:

- Virtual electorate visits
- Education Sessions
- 1 on 1 Sessions.

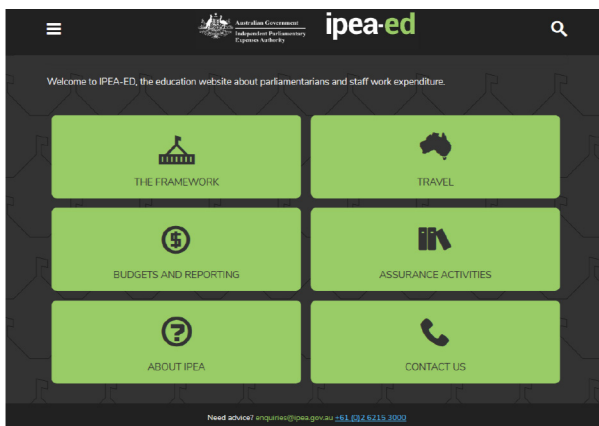
We also provide New Member Inductions. Please contact our IPEA Advice Team to arrange an education session.

Phone (02) 6215 3000

Email: enquiries@ipea.gov.au

To access IPEA-ED Training, please follow the steps below:

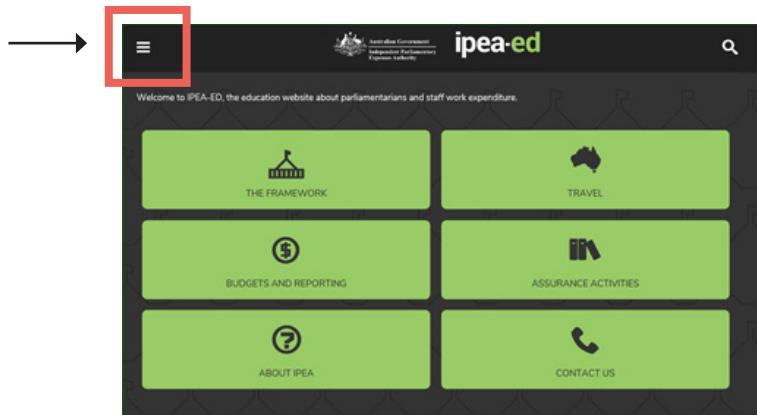
1. Type www.ipea.gov.au/ed into your web-browser
2. Click **enter** on your device
3. The following information will appear:



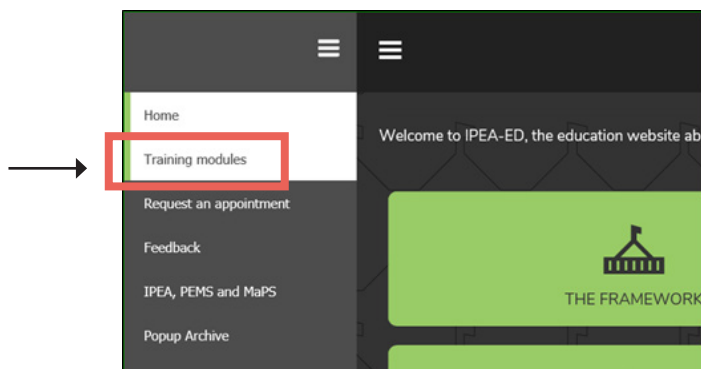
Follow these instructions:

1. Click **Travel**, click **staff**, click **provisions**.
This will provide some detailed information about staff travel provisions and rules.
2. Click **Travel**, click **staff**, click **claiming**.
3. Click **What do I need to do**.
This will give you a workflow explaining the claim process for both advance claims and claims made after travel is completed.
4. Go back to the **main page**.
5. Click **Budgets and reporting**, click **reporting**, click **Monthly Management Report**.
This will give you some information about the report.

6. For more information use the **Hamburger Menu**



7. The **Hamburger Menu** opens, select **Training Modules** from the list.



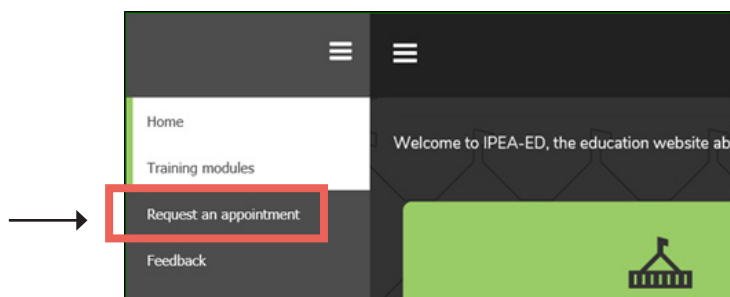
8. The registration process is optional.



Each module takes about 10 minutes, and concludes with as a simple quiz. This is a great source of initial information for new starters, and also a good refresher for those of us who have been around a little longer.

Again, we recommend that you ask new starters in your office to complete the ‘Staff of Parliamentarians’ module #3 at a minimum. We would be very happy to hear any feedback you might have about the training sessions.

9. Another feature we have, in the **Hamburger menu**, is **Request an appointment**. This feature will allow you to book some one-on-one time with one of our Advice Team advisers—either in your APH office or over the phone, or in the states if we are available to travel.



Additional Education Resources include:

Frequently Asked Questions (FAQ's):

There are numerous FAQ's available via: IPEA Publications and Factsheets portal link:

<https://www.ipea.gov.au/publications-fact-sheets>

One example is this FAQ—Self-Drive Hire Cars:

https://www.ipea.gov.au/sites/default/files/final_fact-sheet_self-drive_hire_car_faq_2018.pdf

Factsheets are also available:

There are a number of Factsheets available via: IPEA Publications and Factsheets portal link:

<https://www.ipea.gov.au/publications-fact-sheets>

One example is this Factsheet—Travel Advice Certificates (TAC's):

https://www.ipea.gov.au/sites/default/files/final_travel_advice_certificates_fact_sheet.pdf

How to contact IPEA for further assistance?

Email: enquiries@ipea.gov.au

Phone: +61 (02) 6215 3000



Learning Activity 3.

Q1. IPEA's online training site is called what?

IPEA - _____

Q2. IPEA recommend that you ask new starters in your office to complete which online training module at a minimum?

Q3. If nothing else, it is important you know how to contact IPEA for further assistance, what is IPEA's enquiries email details?



Section 4

Expectations and standards



expectation

/ɛkspɛk'teɪʃ(ə)n/

noun

plural noun: **expectations**

1. **a strong belief that something will happen or be the case.**
"reality had not lived up to expectations"

Like any government agency or service provider, IPEA has expectations (Service Level Standards – SLS's) that need to be met such as; staff meeting timelines, conducting themselves professionally at all times, and being responsive to their client's needs. The following is a list of what YOU can expect from IPEA:

IPEA Travel Advice SLS

1. All calls are acknowledged, with 95% of calls acknowledged within 1 day^(a). This is measured bi-monthly using call system statistics.
2. All requests for advice are resolved, with 95% of requests for advice resolved within 2 days^(a & b). This is measured bi-monthly using call system statistics.
3. Quality and accuracy levels for advice are achieved, with 95% of advice provided being accurate and of a high quality. This is measured with a sample check of advice.
4. 80% of client survey respondents are satisfied with IPEA's advice as measured in the IPEA client satisfaction survey.

Exceptions:

- (a) During Hours: 9am to 5pm—Monday-Friday Canberra time (except for Public Holidays)
(b) Except where IPEA is waiting on essential information from 3rd party providers

IPEA Travel Claims Processing SLS

1. Travel claims are assessed weekly to ensure 95% have been processed within an average of 7 working days and with a 90% degree of accuracy^(a).

2. Requests for additional travel claim information (e.g. where the claim is incomplete) are sent within an average of 4 working days of receiving the initial claim^(b). This is measured monthly using a sample check of all requests.
3. 90% of travel-related budgets are disseminated by the third week of June^(b). New Parliamentarians commencing after 1 July receive their budget/s within one week of official commencement^(b).
4. 80% of client survey respondents are satisfied with IPEA's travel claim processing as measured in the IPEA client satisfaction survey.

Exceptions:

- (a) Incorrect/incomplete claims are not included
- (b) Except where IPEA is waiting on essential information from 3rd party providers

Data & Reporting SLS

1. 95% of expenditure, monthly management and ad hoc reports are provided to current and former parliamentarians in accordance with our reporting schedule^(a,b).
 - i. Expenditure Reports (ER's) are provided on a quarterly basis in accordance with the expenditure reports schedule;
 - ii. Monthly Management Reports* are provided on or before the 15th of each month; and
 - iii. Ad hoc reports are provided within 5 working days, or another timeframe as agreed.
2. 95% of expenditure reports and associated data are published on the IPEA website and www.data.gov.au in line with our publication schedule^(c).
3. 80% of client survey respondents are satisfied with IPEA's reports as measured in the IPEA client satisfaction survey.

Exceptions:

- (a) Dependent on ICT and data availability
- (b) Does not include time waiting for 3rd party data
- (c) IPEA website and data.gov.au website are available

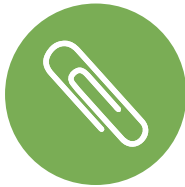
Audit and Assurance SLS

1. **Authority**—an assurance activity will be conducted within the limits of IPEA's statutory authority as outlined in the *Independent Parliamentary Expenses Authority Act 2017*.
2. **Accuracy and Completeness**—an assurance activity will be based on accurate and comprehensive data as is reasonably possible to obtain.
3. **Procedure**—an assurance activity will withstand scrutiny of its processes, in particular its observance of procedural fairness.
4. **Time**—an assurance activity will be completed within a timeframe appropriate to its scope, the information available and the nature of the interaction with the assurance activity subject(s).



IPEA's expectations of you (our client):

- That you provide IPEA with all the required details when you are seeking advice – we can only give you advice based on the information you provide.
- That you submit accurate and complete expense claims - For example: incomplete information, false information or delays in providing information will affect our service and processing times to you.
- That you certify your expenditure reports – Parliamentarians are asked to certify that the work expenses listed in their report are within the legislated purpose.
- That you contact IPEA immediately if you find any anomalies in your reports – it's better to err on the side of caution and have something reported than risk embarrassment with something being published.



Note: for more information regarding Monthly Management Reports* and Expenditure Reports* please refer to LA8 - Work Book #8 Reporting.



Learning Activity 4.

Q1. Insert 2 words below of a shared expectation between IPEA and yourself (our client)?

_____ and _____

Q2. IPEA aims to pay your claims within how many working days of receiving all your information?

One day	Seven days	Two weeks
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Q3. What are the 2 reports IPEA provide you with to help you track and manage your budgets and expenditure?

1. _____

2. _____



Section 5

Answers to Learning Activities:



Self-assessment 1.

Q1. True or False. The establishment of IPEA received bipartisan support?

TRUE	FALSE
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Q2. The review made how many recommendations in total?

3	12	24	36
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Q3. Complete these recommendation statements by filling in the missing words.

'A core recommendation being that a **principles-based** system should be introduced.'

'The review recommended that all travel rules for parliamentarians should be streamlined and consolidated into a **single** act of parliament.'



Self-assessment 2.

Q1. The IPEA acronym is an abbreviation of what 4 words?

Independent	Parliamentary	Expenses	Authority
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Q2. Who is Annwyn Godwin? - IPEA's CEO

Q3. Please insert the correct word corresponding to the relevant IPEA role?

We _____ the travel expenses and travel allowances of parliamentarians and their staff.

Manage	Monitor	Manipulate
--------	---------	------------

We provide _____ advice to parliamentarians and their staff on travel related queries.

Personal	Legal	Private
-----------------	--------------	----------------

We provide _____ reports on all current and former parliamentarians' use of work resources including staff travel.

Incomplete	Sporadic	Regular
-------------------	-----------------	----------------

We _____ travel expenses and travel allowances for parliamentarians and their staff.

Administer	Maintain	Undertake
-------------------	-----------------	------------------

We provide _____ through post payment checking and a range of assurance reviews. We audit parliamentarians' work expenses and the travel expenses of their staff.

Counselling	Assurance	Rulings
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Self-assessment 3.

Q1. IPEA's online training site is called what?

IPEA - ED

Q2. IPEA recommend that you ask new starters in your office to complete which online training module at a minimum?

'Staff of Parliamentarians' module #3

Q3. If nothing else, it is important you know how to contact IPEA for further assistance, what is IPEA's enquiries email details?

Email: enquiries@ipea.gov.au





Self-assessment 4.

Q1. Insert 2 words below of a shared expectation between IPEA and yourself (the client)?

Courtesy and **Respect**

Q2. IPEA aims to pay your claims within how many working days of receiving all your information?

One day	Seven days	Two weeks
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Q3. What are the 2 reports IPEA provide you with to help you track and manage your budgets and expenditure?

1. **Monthly Management Reports**
2. **Expenditure Reports**



Resources:

Resources available include:

- The IPEA ED website <https://www.ipea.gov.au/ed>
- The IPEA: A Quick reference guide to Travel related expenses for parliamentarians and their staff (handbook)
- IPEA Training Resources: Publications, Factsheets, FAQ's and Power-point presentations i.e. 'Personal Advice Factsheet' https://www.ipea.gov.au/sites/default/files/personal_advice_fact_sheet.pdf
- IPEA Training Sessions, Education Sessions, Face-to-face, One-on-one, Drop-in sessions, Electorate Office Visits, and/or Webinars
- *Parliamentary Business Resources Act 2017* (PBR Act)
- *Parliamentary Business Resources Regulations* (PBR Regulations)
- Determinations made under the PBR Act
- About the Independent Parliamentary Expenses Authority – YouTube Clip: https://www.youtube.com/watch?v=UvyWkjfl0vU&feature=emb_title

How to contact IPEA for further assistance?

Email: enquiries@ipea.gov.au

Phone: +61 (02) 6215 3000

