



## **VOLUNTEER TRAVEL & OTHER EXPENSE POLICY, PROCEDURES, AND LIMITATIONS**

### **POLICY**

As a general rule, the Academy does not pay for the travel expenses incurred by members attending committee meetings but under limited circumstances requests for reimbursement of travel expenses may be considered. Limited circumstances would include:

- 1) Members who are employed by the government or an educational institution are eligible to request a travel reimbursement.
- 2) A member whose attendance, in person, at a specific meeting is considered “critical,” and who is either retired or whose employer is unable to pay the expenses, is eligible to request a travel reimbursement.

Reimbursements require the approval of the relevant Academy officer and the Treasurer. Travel expense forms and the policy can be obtained from the committee staff liaison or the Chief Financial Officer.

### Transportation expenses:

- Actual cost of “coach”, “economy”, or equivalent non-refundable base fare for air or rail travel will be reimbursed for trips of less than seven hours duration. Internet, advance purchase, and similar fares should be used where practical. For business travel greater than seven hours elapsed time, the next class above “coach”, “economy”, or equivalent non-refundable base fare will be reimbursed. Requests for reimbursement that fall outside the standard fare classification for “coach”, “economy”, or equivalent non-refundable base fare will be considered for reimbursement based on lower cost if volunteers submit quotes documenting lower cost for approval prior to travel.
- The least expensive, practical ground transportation alternative should be used (e.g. taxi, personal car, or rental car). Limousine/hired car travel may be appropriate in limited circumstances given safety, timeliness, and overall expense considerations
- Parking, tolls, etc, if rental or personal car travel is the least cost practical transportation will be reimbursed. Prior approval is required for use of a personal automobile for a trip of over 4 hours driving time. Prior approval requests should include documentation of the cost of advance purchased airfare. In those events, the volunteer will be reimbursed at the lesser of the current IRS standard mileage rate and the documented advance purchased airfare.
- Incidental transportation at destination will be reimbursed.
- Use of personal automobile will be reimbursed at current IRS standard mileage rate.

### Meals:

- Breakfast, lunch, and dinner not provided as a part of the function attended. Meals will be reimbursed for reasonable amounts.

### Lodging:

- Lodging at or near location of function as required to accommodate start and finish times of function.
- Standard room expense will be reimbursed. If a room block that is provided for the meeting has been exhausted, lodging with similar accommodations within a comparable price range will be reimbursed.
- Internet expense will be reimbursed. Telephone expense for other than Academy related calls will not.
- Business support services (copies, fax, etc.) for Academy related items will be reimbursed.
- Fitness Center, minibar, recreation and similar expenses will not be reimbursed.

### Personal Travel Expenses:

- Personal travel costs are not reimbursable. Volunteers shall not arrange travel at a time that is less advantageous to the Academy or involves any greater expense incurred as a result of personal travel, including but not limited to, extra hotel nights, additional stopovers, meals or transportation. Such costs are the sole responsibility of the individual and will not be reimbursed by the Academy. Volunteers must provide an analysis of any personal travel costs incurred so that reimbursement is made only for costs incurred for Academy business.

### Approvals:

- The Treasurer and the Vice President for the practice council funding the expenses will approve expense submissions prior to travel.
- Any category of expenses not expressly described above should be pre-approved by the Treasurer.

## PROCEDURES

A travel expense report form must be completed for all travel reimbursements with receipts attached for expenses over \$75. Travel expense reports should be submitted to the Director of Finance for approval as quickly as practicable, but no later than 45 days after travel. The Director of Finance will forward approved expenses to the Treasurer for approval. Each expense must include: date expense was incurred; the place expense was incurred; description of expenses; and cost of each expense. Description of expenses should be thorough and include both the business purpose and business relationship that explains why the expense was incurred.

**Airline ticket purchases:** An official internet or other receipt showing confirmed and purchased flight and the cost of the flight must be submitted with the travel expense form.

**Lodging:** A copy of the hotel bill showing itemized charges must be submitted with the travel expense form.

Meals: The business purpose must include the reason for the business benefit gained or expected to be gained or the nature of the business discussion or activity. (Business purposes such as: improve relationship with other organization or out of town meal is sufficient.) The business relationship must include the names of individuals attending the meal and their title or position with the exception of Academy committees and task forces. The name of the committee or task force and the number of members present is sufficient. Individual names of committee members or task force members are not required.

Reimbursement requests may be submitted electronically.

The Academy will provide reimbursement via check to the individual after travel expense form is approved by the Treasurer.

Approved Board of Directors 10/11/12