



### **Travel Reimbursement Policy**

This travel reimbursement policy is intended to serve as a guideline and is subject to modification or amendment by the Executive Board.

#### **Purpose**

- Ensures compliance with Internal Revenue Service (IRS) requirements
- Ensure that reimbursements are on a fair and equitable basis
- Avoids undue record keeping and reimbursement delays
- Ensure that members understand allowable expenses

Chapter 7 is committed to supporting and advancing the efforts of the IRWA at a Chapter, Regional and International level. We believe that involvement and participation from our membership not only helps advance the organization, but also assists members and their employers by enhancing leadership skills, educational offerings and by providing increased exposure to other professionals at a national and international level.

#### **General Guidelines**

- The International Travel Policy shall serve as the general guideline for all expense reporting. [IRWA Leadership Guide - Travel](#).
- Chapter members submitting requests for reimbursement are responsible for complying with the requirements of the International and Chapter travel policies.
- All expense reports shall be submitted on the IRWA International expense form and submitted to the Chapter President for approval. Upon approval by the Chapter President, the expense form and accompanying receipts shall be submitted to the Chapter Treasurer for approval and payment. The Chapter President shall submit all expense reports to the Chapter President Elect for approval. Upon approval by the Chapter President Elect, the expense form and accompanying receipts shall be submitted to the Chapter Treasurer for approval and payment.
- Only the Chapter Member shall be reimbursed. Accompanying travel companion(s) expenses are not reimbursable.
- The Chapter will not reimburse for late payment, late registration fees or hotel rates in excess of an identified group rate unless specifically approved by the Board of Directors. Members are expected to make travel arrangements and take advantage of discounted offerings in order to minimize expense to the Chapter.
- Any member serving a dual role is not permitted to seek duplicate funding for the same event.
- It is the responsibility of the Chapter President, or a Chapter member assigned by the President, to arrange for group transportation to and from Region Forum locations. Should any Chapter 7 member attending a Region Forum that is entitled to a reimbursement expense for travel not elect to utilize the group transportation method, then the member reimbursement for mileage shall not be permitted unless Board approved at least 30 days prior to event.
- Requests requiring Board approval prior to the event shall be submitted in writing or email to the Chapter President. The Chapter President may elect to seek Board approval via email.

## Role Specific Guidelines

### 1. Chapter President / President Elect

The Chapter President and President Elect also serve as International Directors.

#### Allowable Expenses

International Education Conference	All travel related expenses.
Region Forums	All travel related expenses.
General Membership Meetings	Not Covered
Fall Education Seminar	Not Covered

Travel expenses for the Chapter President / President Elect may vary on an annual basis due to the location of the Annual Education Conference. The annual travel budget shall give consideration to the location of the Annual Conference, however, as a general guideline, the annual travel expense for the Chapter President and President Elect shall not exceed \$3,000 per year per person.

### 2. Region Representatives to International Committees

#### Allowable Expenses

General Travel Expenses (May include hotel, transportation, meals, etc.)	\$300 Per Year
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Region Forums	Up to \$150 per night for hotel expense. Excludes reimbursement for meals or transportation.
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Note: Region Representatives may combine the General Travel Expense and the Region Travel Expense, however, in no event, shall the annual travel expense for a Region Representative exceed \$900.00

### 3. International Executive Committee Members (IEC)

On occasion, the Chapter may have a member who is also a member of the IEC. It is a benefit to both the Chapter and the Region to have as much representation as possible at Region events. A Chapter member who is also a member of the International Executive Committee may seek reimbursement for travel expenses related to Region Forums, at least 30 days prior to event with Board approval, provided that the expense is not reimbursable under the International travel budget.

#### Allowable Expenses

Region Forums	Up to \$150 per night for hotel expense. Excludes reimbursement for meals or transportation.
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Note: The maximum allowable annual expense for a Chapter member who is also a member of the IEC shall not exceed \$300 per Forum or \$600 per year.

**4. International Committee Members (Members At Large) or Executive Committee Members**

The Chapter may have members who are either members of the Executive Committee or members at large serving on International Committees. It is in the best interest of the Chapter to encourage these members to participate in Region Forums whenever possible. Due to the potential for a larger number of members requesting travel support to Region Forums, all requests for reimbursement must be approved by the Executive Board prior to the Forum.

In approving a request for travel expense reimbursement, the Executive Board shall consider the following:

1. Level of past Committee participation by the member.
  - a. Attendance / participation in committee meetings.
  - b. Attendance / participation in committee sponsored education sessions.
  - c. Participation at Executive Committee Meetings.
  - d. Attendance / participation at Chapter Meetings.
  - e. Participation at a Chapter level in related committee activities (newsletter contributions, arrangement for speakers, etc.)
2. Space availability in Chapter arranged motor travel.

**Allowable Expenses**

Region Forums

Up to \$150 per night for hotel expense.  
Excludes reimbursement for meals or transportation.

**Key Controls**

1. Expense reports must be submitted on approved form with accompanying receipts as provided for in the International Travel Policy. [IRWA Leadership Guide - Travel](#)
2. Travel expense forms must be approved by the Chapter President & Treasurer or President Elect & Treasurer to assure compliance with this policy.

Approved: Executive Board Meeting - September 28, 2010