



TRAVEL REIMBURSEMENT POLICY AND PROCEDURES

Updated July 2021

Purpose: To support the service that volunteers provide, Sigma Tau Delta subsidizes Board members, staff, Board guests and affiliates (e.g., SRs, the AR, etc.) with travel to and attendance at required meetings. Everyone is asked to be conservative in making travel arrangements, choosing the most economical options available. The following policies and procedures are designed to ensure that we operate as wise stewards of Society funds. These policies apply to all members of the Board of Directors and those invited by the Board to attend its meetings.

I. Overview

- A. Sigma Tau Delta reimburses reasonable travel expenses incurred while traveling on authorized ΣΤΔ/NEHS business.
- B. Money should be spent as if it were one's own—reasonably, judiciously, and without extravagance, and bearing in mind that the majority of our funds are generated from monies gathered from student fees.
- C. Expense vouchers are required within two weeks after travel has been completed.
- D. Reimbursements usually are made by check within two weeks of receipt of expense vouchers.
- E. Full documentation of travel and food expenses submitted for reimbursement is required, including receipts for all non-provided meals, transportation, parking, and other items as noted below.
- F. Gratuities for transportation services and hotel staff are treated as items of personal choice and are not reimbursable. For food services, a maximum of 15% will be allowed for tips, unless the restaurant has automatically applied a tip to the food bill. In either case, the tip will be included in the amount allowed for that meal.

II. Reimbursement Policies

A. Lodging

1. Because ΣΤΔ/NEHS secures special rates, all lodging will be arranged by a Central Office staff member responsible for meeting planning arrangements.
2. Travelers must review their hotel statement/bill for accuracy when checking out of the hotel. Room rates and taxes are paid by ΣΤΔ /NEHS and should not appear on the traveler's hotel statement/bill.
3. ΣΤΔ /NEHS will not reimburse for personal phone calls, in-room videos, laundry, mini-bar items, or any other items of a personal nature.
4. Typically, Board members and staff will have the option of having individual rooms; Board guests and affiliates may be assigned to shared rooms.
5. Individuals traveling at Society expense may elect to share their rooms with people who are *not* traveling at Society expense; the Society, however, is not responsible for any additional charges incurred by these additional occupants, and can only allow the arrangement if doing so does not necessitate the Society having to add more space to its room block.

B. Food and Beverage

1. When meals are provided (e.g., breakfast, the convention gala dinner), Board members, Board affiliates, and staff are expected to participate. Exceptions may be made, at the discretion of the Executive Director, to accommodate such things as travel arrangements or meetings.
2. When meals are not provided, reasonable meal expenses paid out-of-pocket will be reimbursed in accordance with the food and beverage allowance for the respective meeting(s) and in accordance with the stipulations stated below.
3. The daily food and beverage allowance will be established per destination, and announced in notifications prior to each meeting.
4. The remainder of the daily food allowance, less deductions for provided meals, may be used at the traveler's discretion for any combination of food and beverage (excluding alcohol—see item 8 below).
5. Unused portions of the daily food allowance for each day, less deductions for provided meals, may be carried forward; however, reimbursement may not exceed the total adjusted food allowance for the event. For example:

If the event includes four days with a daily food allowance of \$55, but breakfast is provided each day, the daily food allowance is \$45 or a total of \$180 ($\$45 \times 4$) for the four-day event. Total food and beverage reimbursement for the event in this example may not exceed \$180.

6. Travel-day food and beverage reimbursement to and from the event will follow the same guidelines. Travelers may not include any food and beverage within their home city.
7. No alcoholic beverages may be included in food and beverage reimbursements.
8. When groups of Board, staff, guests, or affiliates, have a meal together and the bill is combined, the names of all individuals participating and the amounts of their respective portions of the bill, must be listed on the receipt or in a statement submitted for reimbursement by the person paying the bill. Other participants will reduce their reimbursement request(s) accordingly. (See also I.F., above, concerning tips.)

C. Travel

1. Travel must be booked at the most cost-effective fare. Flight insurance/trip protection is not covered. Only coach fares will be accepted for air-travel reimbursement purposes.
2. Travel arrangements must be completed and submitted to the Central Office within the time specified in meeting notifications.
3. Individuals who desire early travel assistance purchasing travel tickets should contact the Central Office prior to the specified deadline for submitting travel plans.
4. Checked luggage is reimbursable for one item, both going and returning.
5. At the departure city, airport parking at the lowest rate available (typically extended or long-term parking) is reimbursable.
6. In the destination city, transportation to and from the airport should be accomplished by means of hotel shuttle or the most cost effective manner. Taxis are reimbursable only if it is less expensive to travel this way than by shuttle. This may be the case if 3 or more persons are sharing.
7. Cars rented at the airport for airport/hotel transportation are not reimbursable.
8. Automobile transportation between home and the airport is reimbursable at the rate designated by the IRS (currently 56w cents per mile).
9. The use of personal vehicles will be reimbursed at the rate set by the federal government for business travel. Tolls and self-service local parking are also covered. These will be reimbursed only up to the amount it would have cost to have traveled by air or train, whichever is lower. Those considering using a personal vehicle for travel to and from a meeting are urged to compare costs and to consult the Central Office.

D. Miscellaneous

1. Non-food items, such items as clothing, toiletries, and medications, are not reimbursable.
2. In the unlikely event that illness or a similar emergency prevents a Board or staff member from using a previously purchased ticket, the Executive Committee may approve the reimbursement of travel expenses not otherwise recoverable from other sources.
3. Monies spent on travel are intended for the sole use of Board members and those persons invited by the Board who are directly engaged in Society business. The Executive Director will review expenses submitted for reimbursement and, at his or her discretion, may disallow expenditures not in keeping with the spirit of this document. Any disputes should be addressed to the Executive Committee.
4. Travelers are reminded that the federal government considers reimbursements in excess of published allowances to be taxable income. Travelers are individually responsible for reporting any such payments and for any taxes that may result.
5. Any questions concerning interpretation of any part of this reimbursement policy should be addressed to the Central Office.