

Travel Reimbursement

Policy: SAYMA will promptly reimburse authorized individuals for travel expenses related to their SAYMA responsibilities. SAYMA will budget adequate funds so that anyone conducting SAYMA business can be reimbursed for such expenses, even though some may choose to donate the costs of their travel.

SAYMA will reimburse actual and necessary expenses for transportation, lodging, and subsistence. SAYMA expects individuals traveling on SAYMA business to take advantage of Friendly hospitality when it is available in lieu of hotel accommodations. SAYMA will reimburse for bus, air, train, and personal auto expenses for intercity travel, as well as for taxis and public transportation within cities. Travelers are expected to use the least costly means of travel consistent with the distance and urgency of the business. SAYMA will reimburse other necessary expenses associated with travel such as meeting registration fees.

Definitions:

"Authorized individuals" means individuals in SAYMA positions of responsibility other than the treasurer.

"SAYMA business" includes representative meetings, committee meetings, meetings and events held by Wider Quaker Organizations to which the authorized individual is a SAYMA representative. It does not include the annual SAYMA Yearly Meeting

Procedure:

1. Travelers will submit an itemized voucher of expenses for which they wish reimbursement to the treasurer. Receipts are required for intercity transportation, hotels, and meals.
2. The travel voucher will include date(s) of travel, name of traveler, purpose of travel and expenses.
3. Travelers who drive personal automobiles may request reimbursement for gasoline and oil actually used, or may request a mileage-based reimbursement. Under Federal tax regulations, individuals traveling for charitable work (SAYMA volunteers) are reimbursed at the charitable mileage rate. Travelers using personal automobiles may also be reimbursed for tolls and parking in addition to mileage.
4. The treasurer will review the reimbursement request to determine that the traveler was an authorized individual on SAYMA business, that expenses were reasonable, and that SAYMA has funds budgeted for the travel. If necessary, the treasurer will query the traveler to obtain complete information.

5. If the travel voucher is in order, the treasurer will issue a check to the traveler, and retain the travel documentation until the end of the current fiscal year, when it will be archived at SAYMA's headquarters.
6. If the treasurer is unable to settle the travel voucher because of incomplete information or questions related to travel authorization or budget, s/he will consult with the Finance Committee to reach a disposition.
7. Travelers may require payment of some or all travel expenses in advance of traveling, e.g., for air travel or meeting registrations. Travelers may request advances of some or all of the expense of travel by submitting documentation of anticipated expenses, and indicating whether SAYMA should make payment to the traveler or to the vendor (e.g., an airline or registration fee). The treasurer will review such requests as above, issue payment, and retain records until travel is complete, when expenses will be reconciled against the final travel voucher.
8. If the treasurer travels on SAYMA business, s/he may be reimbursed by submitting a voucher to the assistant treasurer or clerk, who will process it as above and issue payment. Completed documentation, with annotation of approval, will be returned to the treasurer and retained per #5 above.
9. So that SAYMA can budget adequate funds for travel, each person who travels for SAYMA who does not request reimbursement will be asked to submit a statement of expenses, which SAYMA will acknowledge as an in-kind contribution for tax purposes. Travelers may also request a partial reimbursement of travel expenses, in which case SAYMA will provide acknowledgment of the balance that was contributed.

[Approved 9/28/2013]