

SOCIETY OF WOMEN ENGINEERS VOLUNTEER TRAVEL EXPENSE REIMBURSEMENT POLICY

BACKGROUND:

In 1998 the Senate (previously Council of Representatives and CSR) directed SWE to establish a policy to begin funding travel expenses associated with Board approved SWE meetings. The original policy covered Board of Directors (BOD) and Board of Trustees (BOT) meetings only. The policy was later worded to cover any SWE volunteer attending any meeting that the BOD has approved for funding. The BOT is covered under BOT Travel Policy.

The FY20 update to this policy including removing references to regions and adding language to prioritize SWE work while on business travel with SWE

GROUND RULES:

The BOD will allocate funding for travel expenses for approved meetings through the budgeting process. There shall be a line item in the SWE budget allocated for travel reimbursement for each group holding such approved meetings. The BOD liaison will determine the appropriate attendees for approved meetings. The SWE President or Treasurer shall act in this capacity for the BOD.

Prior to applying for reimbursement, SWE volunteers will determine if funding from their employers or universities can be obtained to defray the cost of attending meetings. Employer and/or university funds used for travel will not be reimbursed.

By requesting reimbursement under these policies, a SWE volunteer is certifying that she/he will not take an income tax deduction for any of the reimbursed expenses. A volunteer may elect to submit expenses and ask for them to be a donation to the Society. In this case an income tax deduction will be provided to the volunteer for those donations.

SWE volunteers are expected to be prudent and cost-effective when making their travel plans. Volunteers are also expected to prioritize SWE business ahead of personal or work related activities if utilizing the SWE reimbursement policy or a SWE registration discount to travel to an event.

ELIGIBILITY:

Policy for travel reimbursement for SWE Staff is documented with a Headquarters policy. Travel of Staff should be included in the budget process if they are expected to attend approved meetings.

Travel and registration expenses for SWE members and volunteers will be reimbursed as noted below. Concur must be used to book flights and hotels unless SWE Staff provides a hotel room block code to utilize.

Pre-Approval is not required for BOD and Senate members to travel within this policy as long as the travel will meet the appropriate guidelines. Any deviations needed from this policy require a pre-approval to be attached to the expense report. Other SWE members traveling against this policy are required to obtain pre-approval from their BOD liaison and attach this pre-approval to their expense report. Pre-approval should include estimated cost and return on investment to travel. Group pre-approvals for a team is allowed (e.g. Travel to installation for a whole committee).

BOD: To attend all BOD meetings, other meetings where attendance is required, speaking engagements on behalf of SWE, or relevant conferences as requested by the President (e.g. NSBE, SHPE).

Senators and Senate Leadership: For specified face to face meetings of the Senate as well as other meetings as requested by the BOD (only a registration code is provided for annual conference).

Other SWE Members: As requested by BOD.

REIMBURSABLE EXPENSES:

- The actual cost of airfare or rail fare to the site of the meeting. Also included is the cost of one checked bag of 50 pounds or less. The cost of changing an airline ticket is not reimbursable unless there are extenuating circumstances, such as a family emergency. In the case where additional personal or business travel is associated with the SWE business travel, the airfare / trainfare ticket should be the same cost or lower than if the individual only booked a ticket for the dates they need to be there on SWE business. If it is higher because of the additional, non-SWE business travel, then the difference is not reimbursable.

Note: Every attempt should be made to obtain airfares 30 days in advance and at lower rates.

- Reimbursement for automobile transportation to the meeting is at the IRS approved business rate. Reimbursement for a rental car plus gas is also covered. If the cost of mileage or rental car plus gas exceeds the cost of air transportation to the meeting, reimbursement will be capped at the cost of air transportation.
- Lodging required during a meeting will be reimbursed at the negotiated rate at the hotel where the meeting is held, or actual cost, whichever is less.
- Shuttle or cab fare will be reimbursed from the airport or rail station to/from the meeting site and to/from home. A rental car plus gas is also reimbursable if this is more economical than the shuttle or cab fare.
- Airport parking, tolls, and parking at meeting site are reimbursed.
- Telephone expenses pertinent to meetings performed by telephone are reimbursed, as is the cost of internet connection at the hotel, as needed for meeting purposes.

- Other expenses such as telecommunications, entertainment, and incidentals are not reimbursable. Cost of meals provided or required during meetings is reimbursable. Other meals are not reimbursable except for Collegiate members.
- For WeLocal participation, the President (or designated representative) who will present the Society overview can be reimbursed for travel. A registration code will be provided and will not be reimbursed directly for WeLocal only.
- For international travel, expenses should be listed in U.S dollars using the exchange rate in effect during the dates of travel. Include documentation indicating what exchange rate was used to make the conversion. Current exchange rates can be found at www.oanda.com. If purchases were made via credit card, the exchange rate provided by the credit card company should be used. Alternatively, expenses can be listed in the currency of the country where they were incurred. Conversion rates will be applied to determine reimbursement based on the above method.

PROCESS:

Reimbursement requests must be submitted in Concur within 30 days of travel. Requests may also be submitted for the expenditure of funds that occur prior to travel (e.g. advance purchase of air fare). Requests not submitted within these time periods will require BOD approval for immediate reimbursement or they will be held until the end of the fiscal year for reimbursement if any budget remains. Members that do not have a Concur account may email hq@swe.org to have one set up.

Reimbursement procedures are included in the Board of Directors procedure.

Approved: July 11, 2019