DELEGATE GUIDELINES FOR EXPENSE REIMBURSEMENT

1. Each delegate shall maintain a detailed record of all expenses incurred in connection with his or her attendance at the conference or seminar for which he or she expects reimbursement. The expenses shall be summarized on an educational conference expense report proved by the Union office.

A. Wherever possible, a receipt for monies spent or charges incurred shall be obtained and attached to the educational conference expense report form. This shall include receipts for actual air transportation (in the form of reasonable roundtrip coach airfare) and hotel accommodations. To the extent practicable, airfares shall be purchased sufficiently in advance of the conference or seminar to obtain the most economically favorable travel costs. **A detailed and itemized receipt must accompany every expenditure.** Where it is not possible or feasible to obtain a receipt (such as cabs, telephone, tips), a written verification is sufficient.

B. Each delegate may pay for his own hotel bill while attending the conference or seminar and list the cost of his or her hotel room for the duration of such conference or seminar on the expense report form. Such hotel costs are reimbursable for the **night before the first full day of the conference** or seminar **through the last night of the conference** or seminar. If there is only one standard hotel room rate for the conference or seminar it may be used even if the room is occupied by more than one person. However, if there are varying rates depending on the number of persons occupying the room, only the single room rate shall be reimbursed and listed on the educational conference expense report form. Any costs of the use of massages or spa treatments, movies, videos and gyms **shall not** be reimbursed.

C. Actual and reasonable expenses (relative to venue) for transportation to and from the airport, bus station or train station (i.e. shuttles or taxicabs) and/or airport parking shall be reimbursed.

D. All **reasonable** costs of delegate meals shall be reimbursed. The reasonable purchase of alcohol shall be reimbursed when consumed with a meal. One cocktail, beer or glass of wine is considered to be reasonable. Room service, at a reasonable cost, shall be reimbursed so long as itemized receipts accompany any request for reimbursement. **Expenses are reimbursable for delegate only. Any additional expenses for spouse, family member or guests must be paid for by delegate.**

E. In-town transportation (taxicabs, buses, limousines, etc.) shall be reimbursed. Rental of automobiles for purposes of providing transportation from the delegate’s hotel to the conference or seminar headquarters, hotel and/or places of dining shall be reimbursed if that expense will not exceed the cost of providing such transportation in the form of public transportation. Rental cars shall be reimbursed only if pre-approved by Business Manager prior to conference or seminar.

F. When a personal automobile is used for transportation to and from an educational conference or seminar; in lieu of reasonable roundtrip coach airfare, the amount of reimbursement shall be calculated by multiplying the actual mileage to and from the conference, meeting or seminar by the current mileage reimbursement rate (as allowed by the Internal Revenue Service) per mile plus any overnight lodging provided, however, such reimbursement **shall not exceed the amount of a roundtrip coach airfare ticket to and from the conference or seminar.** When travel by train is used to and from the conference in lieu of airfare, the amount of reimbursement **shall not exceed the amount of a roundtrip coach airfare ticket to and from the educational conference or seminar.**
2. It is the intent of the delegate that only reasonable expenses actually incurred by an authorized delegate shall be reimbursed. Reasonable expenses also include wages, if the delegate is employed immediately prior to his or her attendance at an educational conference or seminar and is not otherwise receiving wages, or other remuneration, during the time period of attendance at the conference or seminar. Wages to be reimbursed shall be calculated at the straight time rate for eight (8) hours per day, not to exceed forty (40) hours per week, at the rate (inclusive of benefits) currently being earned by the delegate. Any additional cost for spouses, children, etc. is not subject to reimbursement. Travel days, other than Saturday or Sunday, shall be reimbursed if necessary due to the location of the educational conference or seminar. Travel days shall be defined as the day prior to an educational conference, seminar or pre-conference meeting and the day after the last day of an educational conference or seminar.

3. The expenses mentioned above shall only be allowed to the extent that they are direct expenses that are not otherwise reimbursed and would not have been incurred but for the delegate’s attendance at an educational conference or seminar.

4. Within ninety days after the return from the conference or seminar each delegate who attended the conference or seminar shall complete an educational expense report form and submit it to the Executive Board.

   A. All expense advances, deposits and direct payment made by the Union office shall be listed and subtracted from the total expenses actually incurred.

   B. As many original receipts and copies of charges incurred in connection with attendance at an educational conference or seminar as possible shall be attached to the educational conference expense report to substantiate the expenses incurred.

   C. If the total advances, deposits and direct payments exceed the total conference and/or seminar expenses actually incurred, the excess shall be refunded to the Union at the time of submission of an educational conference expense report form. If reasonable, ordinary and necessary and actually incurred expenses exceed the advances, deposits and direct payments, the union shall issue an additional reimbursement check for the difference to the delegate(s) after taking into consideration additional approval, if necessary, by the full Executive Board.

5. It shall be the Executive Board’s responsibility to review the educational conference expense report forms submitted by each delegate attending a conference, meeting and/or seminar for completeness, supporting documents and mathematical accuracy.

6. The following is expected of a delegate while attending an educational conference:

   A. Prompt attendance at all sessions.

   B. Attendance at all pre-conference session activities if the delegate is claiming lost wages for those days.

   C. Attendance at any scheduled receptions or evening events that are included in the registration costs of the conference and/or seminar.

   D. Such attendance may be excused if the delegate is forced to leave the educational conference or seminar due to a personal or family emergency.