

Travel and Expense Guidelines for Staff and Volunteers

Effective 10-1-2014

General

1. Travel and meals, along with all Association expenses, are funded by the generosity of our donors, past and present. We are honored to utilize these funds in the furtherance of the Unitarian Universalist Association's mission.
2. Expenses should be limited to those which are essential to Association business.
3. Video or teleconference technology should be used as an alternative to travel whenever practical.

Travel

1. Every effort should be made to book air travel as soon as the necessity for a trip is determined, or 21 days (14 days for shuttles) in advance. Reimbursement for airline travel purchased less than 21 days (14 days for shuttles) in advance must be approved by the COO or CFO. Travel should be booked at the economy rate, unless approved by the COO or CFO.
 - a. We strongly recommend that air travel bookings go through the UUA's travel agency: [Protravel International](#). By using the agency, travelers will be able to charge expenses directly to budgets, and changes and cancellations can be accommodated.
 - b. If air travel is not booked through Protravel International, the date the flight was booked should be reported on the Travel & Expense Report form or staff Amex reimbursement report.
2. Travelers using rental cars should use compact or subcompact sized cars unless several persons will be sharing the car. Typically, all insurance offered by the rental agency should be waived, since the Association maintains a blanket insurance policy to cover all aspects of non-ownership liability for rental cars. Travelers renting cars in countries other than the United States or Canada, however, should take complete insurance coverage.
3. Every effort should be made to use low cost ground transportation. Use of public transportation is encouraged. Travel by taxi is to be avoided if alternative public transportation is available.
4. Personal car usage is reimbursable at the current IRS rate (\$0.56/mile for 2014). When one chooses to drive to a meeting, reimbursement will be made at the lower of the

mileage reimbursement rate or lowest available airfare.

5. Fines for parking or traffic violations are not reimbursable expenses.

Lodging and Meals

1. Moderate or lower-priced hotels and motels should be used. When traveling with a partner, spouse or other(s), travelers are expected to pay the additional cost, if any, for double or additional rooms.
2. Travelers should consider sharing rooms during meetings, but this is not required.
3. Meals when traveling are reimbursable, up to [federal per diem reimbursement rates](#), including tips. The cost of alcoholic beverages is not reimbursable.
4. Generally, expenses for social gatherings/meals of UUA staff are not authorized reimbursable expenses.
5. Reasonable tips for such things as housekeeping and baggage handling are reimbursable.

Other

1. Exceptions to this policy must be approved by the President, COO or CFO. Approval for any exceptions must be made in writing.
2. Travel to countries other than the United States or Canada can be approved only by the President or COO.

Reimbursement

1. Expenses may be submitted for reimbursement when incurred, even if this is in advance of the meeting.
2. Meals: The cost of each meal should be itemized separately, and include business purpose, and names of diners if the meal is for more than one person. The original or scanned receipt should be submitted if the expenditure is greater than \$50.
3. All [requests for reimbursement \(Excel\)](#) ([PDF](#)) must be submitted using the UUA Travel and Expense Report form and fully documented with receipts provided for expenditures greater than \$50. Volunteers should submit the form to the appropriate UUA staff liaison within two weeks of the meeting. UUA staff should submit reimbursements to the Financial Services Department within two weeks of expenditure. Financial Services should reimburse expenses within one week of receipt of the request.
4. Requests for reimbursement submitted more than 30 days after the end of the fiscal year in which the expense(s) incurred will not be paid.

5. All Travel and Expense Reports must be approved by the employee's supervisor or committee liaison prior to submitting to Finance for reimbursement.

Travel Advances

1. Employees whose normal work assignments require occasional travel can obtain temporary advances in an amount equivalent to predicable out-of-pocket expenses. These advances must be repaid at the time Expense Reports are submitted. Staff members are required to account in full for any outstanding temporary travel advance before applying for an additional advance.
2. All advances must be approved by the appropriate staff group director.

Volunteers – Additional Guidelines

1. *Board and committee expenditures, including travel, are not reimbursable when that committee has exceeded its budget, unless express permission is received in advance from the Treasurer, the COO, the Moderator, or the Chair of the Finance Committee.*
2. *Only expenses related to volunteer service are reimbursable from the Unitarian Universalist Association (UUA) Budget. If a board or committee member incurs expenses for non-meeting activities (such as extra hotel nights related to non-committee related business prior to or following a meeting) these expenses will not be reimbursed. If these costs are directly billed to the UUA (such as hotel nights prior to General Assembly) the individual will be required to reimburse the UUA for such expenses within 30 days.*
3. *An advance for meeting-related travel will be authorized by the Treasurer in cases of economic necessity.*