

Travel by Volunteers – a Guide to Claiming Expenses

1. These rules apply to travel by IEEE volunteers, including members of the Region 8 Committee and apply to any travel where Region 8 money is to be used. Volunteers are urged to ask for financial support, where feasible, from other sources and to use IEEE funds only when such support has not been given.
2. Travel to destinations outside Region 8 require the Director's prior authorization and approval if any Region 8 money is to be used, whether or not money is already available in a budget. If the Director is not available, prior approval must be obtained instead from the Past Director, the Director-elect. Any travel expense claim by a volunteer for reimbursement from Region 8 funds must comply with these rules for travel, whether or not the volunteer concerned is a member of the Region 8 Committee.
3. Any travel cost incurred using Region 8 money (in part or entirely) must be recorded on a Region 8 spreadsheet expense form, whether it is to be repaid by the Region Treasurer or by a Section Treasurer, or through a representative's budget. Travel costs are only to be incurred with the knowledge and approval of the IEEE budget holder concerned.
4. The Director, at his sole discretion, may authorize payment from Region funds of expenses not covered by these rules. The Director has no obligation to reimburse expenses not in compliance with these Rules, unless prior consent has been obtained. The Director shall decide any disagreements arising from the application or interpretation of these Rules.
5. Reimbursement will be limited to the following items:-

Transportation

(a) The actual bus, train or air fare, wholly and necessarily incurred in travel between home or place of work and the meeting place. The air fare should be the lowest available; and in no case is to exceed the cost of a full-rate 'economy' fare.

No reimbursement will be made for business class or first class air travel. The original voucher from the supplier must be sent with the claim. In most cases submission of the claim by email and supported by clear scanned copies of the original receipts is allowed.

All tickets should be purchased as early as is possible and no later than three weeks before departure in order to qualify for the cheapest fares. Agency deals that attract commission and do not deliver the cheapest offer should be avoided.

(b) Local transportation by airport bus, train or short-distance taxi. The maximum reimbursement for any single journey by taxi is \$60.

(c) Use of a personal or rented car and associated ferry charges, tolls and parking fees, provided that the cost does not exceed that of the lowest available air fare (claims for reimbursement of car travel must be supported by a statement of the lowest air fare for the journey). IEEE is not responsible for any accident claims resulting. The participant must ensure that the proper personal insurance is held.

(d) fees paid for visas and permits needed for participation as a volunteer in an IEEE meeting or conference.

(e) personal medical insurance may be permitted where this is made a condition of travel by a recognised medical practitioner.

6. Meals and lodging

(a) Hotel cost at the single room rate at a moderately priced hotel, from the night before the first day through to the night following the final day of the meeting. If you extend your stay in order to obtain a special discounted fare, or to take advantage of a "package deal", the additional single hotel room and meal expenses will be reimbursed, providing that there is a net saving for IEEE. The original hotel bill must be sent with your claim.

(b) Reasonable cost of meals during the period of the meeting and travel, except where meals are provided (e.g. by the Region or by the airline). The cost of any extra meals is not to exceed \$ 50 per day. Original receipts are to be provided for any meal expense over \$ 25.

(c) Note that expenditure on non-essential items (e.g. newspapers or entertainment) will not be reimbursed.

(d) No expenses may be claimed for a spouse or partner. If a double or twin room is used, the rate for a single room may be claimed. However, partners are generally invited to attend Social functions that may be organised.

For Region 8 Committee members and others invited by the Director to Region 8 meetings the responsibility for the reimbursement of expenses rests with the Region Treasurer, under the overall direction and control of the Region 8 Director. The Treasurer may approve the payment of expenses out of Region 8 funds, if satisfied that the expenses claim is in accordance with these rules. Expenses claimed for attendance at a Region 8 or other committee meeting must only relate to those expenses arising directly from attendance at the committee. Expense claims are to be submitted to the Treasurer promptly after the meeting, using the Region 8 expense spreadsheet (available from the Region 8 web site, or from the Treasurer) with the necessary documentation attached. Claims reaching the Treasurer more than six months after the meeting may not be reimbursed.

Residents outside of the Euro zone should claim in their own local currency; or in the currency of the bank account to which the funds are to be credited. Others should claim in USD or in Euro.

8. To reduce bank charges and for security, the Treasurer will normally transfer the amount of an approved expense claim directly to the claimant's own bank account. No cheques will be issued because of the charges incurred and security risks. For this reason information on bank and account identification should be given on the 'Bank Details' tab of the expense spreadsheet. For security this information need only be sent once unless the bank or personal details change.

Expenses will not be reimbursed at a committee meeting. If for good reason (e.g. exchange control) you cannot pay your hotel bill or other travel costs yourself, you should contact the Treasurer **well before** you travel. If in doubt, ask for advice.

Brian R Harrington
Region 8 Treasurer
January 2009