



Region 8 Guidelines for Claiming Reimbursement of Expenses



The following rules apply to all travel and subsistence claims by IEEE Volunteers which are to be reimbursed from the R8 budget.

Overview:

IEEE is a not-for-profit tax-exempt organisation under New York State Law, and it is IEEE Policy that no IEEE volunteer may receive any personal payment or financial benefit from their IEEE service. Of course, they are entitled to claim reimbursement of reasonable, actual and verifiable expenses.

R8 receives an allocation from IEEE (independent of Section Rebates) to enable at least one meeting of Section Chairs to be held each year (we choose to hold two) and for communication with the whole R8 Membership (we use R8 News as our main method). In order to support R8 activities and to develop membership (including initiatives proposed and approved by the R8 Committee), expenditure in recent years has intentionally exceeded income and involved using reserves. Naturally this cannot continue indefinitely, and in order to maintain the existing level of activities (including two R8 Committee meetings per year) it is essential that the R8 Section Chairs and the R8 Committee appointed and elected officers take a responsible approach to their expenditure and seek to minimise their travel, hotel, and subsistence claims.

It therefore seems prudent to re-confirm the policy for expense claims, and give some examples of what can and cannot be reimbursed.

In the case of claims which appear to be excessive or to include ineligible items, the R8 Treasurer will provide details to the R8 Director, who may seek further information and may authorise a partial or a complete reimbursement. Should any claim be shown to be fraudulent, it is unlikely that any part of it would be approved for payment. In the case of disagreements, the R8 Director is authorised to make a final decision, after seeking advice from the appropriate source in IEEE Piscataway. For travelling to events outside of Region 8 (that is, in the nine other IEEE Regions) the Director's agreement should be sought before making the arrangements.

Transportation:

For air fares, the cheapest discounted economy fare should be sought. With the increasing number of budget airlines in Europe and the general availability of a range of reduced fares between many locations, IEEE volunteers are expected to make a reasonable attempt to locate the cheapest available connection and fare, and are recommended to purchase their tickets well in advance since this often results in the lowest prices. *In the case of long flights, the R8 Director is authorised to permit business class air fares if recommended on medical grounds and if funds are available in the appropriate budget.*

Claims should include documentary evidence of the amount actually paid for the flight, including any booking or credit card fees, and the ticket-stub should be enclosed. Note that the price printed on the ticket stub, if any, is not evidence of the amount paid, since the amounts often do not correspond.

Although in some cases very low fares can be obtained at the last minute, it is recommended that reservations are made well in advance and as soon as possible since the number of low-cost seats on each flight is often very limited. Care should be taken when using Secretarial or Agency assistance to make such arrangements. This often results in an unacceptable higher cost. Region 8 cannot pay for a partner's air fare unless this is agreed in advance with the Region 8 Director to fulfil a particular meeting requirement.

Local transportation by taxi is allowed, but use should be made of cheaper airport buses or hotel shuttles where available, and sharing of taxis for economy should be arranged where possible. Naturally, care should be taken to avoid being overcharged by unofficial, unregulated or dishonest taxi drivers, which is common in some locations. Advice of local organisers should be sought on how to avoid overcharging and about travel methods between airport and hotel. Airport and City websites often provide good information on local travel methods, routes and costs.

Travel by a personal or rented car is permissible, together with associated necessary ferry, toll and parking charges, provided that the total amount claimed does not exceed that of available public transportation. In the case of long-distance car travel, documented evidence of the lowest air fare for the same route must be provided with a claim for reimbursement of car-travel. **It is the responsibility of the traveller and not IEEE to ensure that adequate insurance-cover is held for the use of a private vehicle.**

The cost of necessary visas and insurance against baggage loss and travel-cancellation fees will normally be reimbursed, but the payment of high agency fees for obtaining visas should be avoided. Note that visa processing times are tending to become much longer so that early application is recommended. If an invitation is required in order to obtain a visa, the Section Chair of the Section being visited can normally issue a suitable letter.

Hotel Costs:

Normally the cost of bedroom accommodation at a Region 8 Committee Meeting will be charged to a 'Master' account. If the accommodation arrangements for a meeting are to be made in person the cost of a single room at a moderate quality hotel from the night before the IEEE event commences to the morning after the event ends may be claimed. In the case of sharing a double room with a partner, the cost of an equivalent single room should be claimed.

In some cases a 'package deal' involving a longer stay might be more economical, in which case this can be reimbursed provided that full documentary evidence is provided. Advance reservation using either the Hotel website or web-based agencies which offer hotel rooms at discounted rates are often worth investigating to achieve lower costs.

The use of hotel mini-bars, pay-TV and hotel sport or health facilities (these are often included in the Hotel package) will not be reimbursed. Telephone calls will not be reimbursed unless they are for necessary IEEE business, and in any case the use of hotel room phones for long-distance calls should be avoided if possible because of high charges.

Meal Costs:

Where meals are not provided as part of the IEEE meeting or the airline, the reasonable cost of meals will be reimbursed, subject to a maximum of \$50 per day. Original receipts must be submitted for any individual meal costing more than \$25 (€32:00). Moderate claims for beverages (wine, beer, coffee, tea) may be reimbursed if they are an inclusive part of the cost of a meal, and are in accordance with local custom.

For meals involving several IEEE volunteers or official guests, the cost may be reimbursed, provided that a list of those being paid for is also be submitted.

Tips and Gratuities:

Moderate tips and gratuities will be reimbursed where these are in accordance with local practice.

Conference Costs:

When a volunteer is attending an IEEE business (committee) meeting held at the time and venue of a conference, he/she may wish to attend the conference as well. If this requires that the conference registration fee has to be paid, R8 will *NOT* normally reimburse this fee, nor the cost of social events associated with the conference but unrelated to the business (committee) meeting. The conference organisers may be willing to give the volunteer free or reduced-cost registration and this should therefore be requested of them.

Mechanics of Claims:

Claims should be submitted promptly and the R8 Treasurer may decline to handle any claim submitted more than six months after the expense is incurred. The IEEE Region 8 Expense claim form is an Excel spread sheet which automates most of the calculations. The entries must all be in a single currency with the conversion rate used for each other currency stated. You should work in the currency most appropriate to you and so as to avoid unnecessary currency conversions. The Region 8 Treasurer is able to make payment in most International currencies.

It may be helpful to supplement the Excel spreadsheet with a separate sheet giving a chronological list of all expenses with explanations where needed to better explain any particular item. Originals of all major receipts must be included.

The normal method of reimbursement is by electronic funds transfer, and only in very exceptional circumstances will the R8 Treasurer issue a cheque or pay reimbursement in cash. Therefore in all cases, the claim should be accompanied by the name and number of the bank account to which payment is desired and the full bank name and address and IBAN/SWIFT codes should be included.

IEEE volunteers who may have difficulty in paying their hotel bills or other local cost because of exchange control or other currency problems, or who are unsure about acceptability of their credit cards in foreign countries should contact the R8 Treasurer well in advance if special arrangements are needed.

Other sources of Support:

In order to conserve the Region 8 budget and enable more other IEEE activities to be financed, IEEE volunteers who are able to claim all or part of their expenses from other sources such as an employer are encouraged to do so. In particular, this may enable them to use business class air travel if the employer is willing to pay the difference between a business class fare paid and the discounted economy fare for the same flights.

Interpretation: *Nothing in this document is intended to be in conflict with the IEEE Constitution, Bylaws or Policies. In the case of a difference on any matter, the Constitution and Bylaws take precedence.*

