

Portions of LEYM Policies & Procedures that concern the Travel Fund

IV. OPERATIONS

A. Financial Support and Fiscal Policy

3. *Expense Reporting and Reimbursement*

b. Travel Fund

- i. Yearly Meeting officers and representatives to Friends' organizations may receive reimbursement for travel expenses for business on behalf of the Yearly Meeting and for attendance at meetings of Friends' organizations. A committee member may be reimbursed for unusual expenses incurred on behalf of the Yearly Meeting if the presiding clerk provides written approval in advance. A copy of the Travel Expense Reporting Form appears in Appendix E.
- ii. Reimbursable costs include registration, transportation, ~~and~~ lodging, **and food for the registrant during the event.**
- iii. If a Friend drives and requests reimbursement, the amount is calculated on a per-mile basis.
 - (a) The current reimbursement rate, approved in June 2024, is 21¢ per mile. Any change to this rate is part of the budgeting process, proposed by Finance Committee and requiring approval by the Yearly Meeting.
 - (b) The incremental portion of mileage reimbursement above the 14 cents per mile standard charitable mileage expense rate is includable in the taxable income of the volunteer.
- ~~iv. — Friends are expected to cover their own food costs.~~
- v. With regard to lodging:
 - (a) When possible, Friends are asked to arrange lodging with Friends in the area of travel.
 - (b) If conference-offered lodging is available and the traveler chooses to stay at a higher-cost location, LEYM will reimburse up to the conference-offered lodging cost.
- vi. However, the intent of the Yearly Meeting is that no one be excluded from representing Lake Erie Yearly Meeting because of limited financial resources; thus, individuals may request reimbursement for additional travel-related expenses or take them as a tax-deductible contribution to the Yearly Meeting.
- vii. For special travel needs of Friends within the Yearly Meeting relating to Quaker work, the presiding clerk, the treasurer, and the clerk of the Finance Committee will consult with one another, and the presiding clerk will respond. Other officers, other committee clerks, and other members of the Finance committee may be consulted as needed.

APPENDICES

D. Scholarships and Financial Assistance

1. For Adults

a. Yearly Meeting business. Yearly Meeting officers and appointed representatives to Friends' organizations may receive reimbursement for travel expenses for business on behalf of the Yearly Meeting and for attendance at meetings of Friends' organizations. The principal travel cost to be reimbursed is the transportation itself. Friends are expected ~~to cover their own food costs and~~, whenever possible, to arrange lodging with Friends. However, the intent of the Yearly Meeting is that no one be excluded from representing LEYM because of limited financial resources; thus, individuals may request reimbursement for additional travel-related expenses or take them as a tax-deductible contribution to the Yearly Meeting.

An LEYM committee member may be reimbursed for unusual expenses incurred on behalf of the Yearly Meeting by obtaining written approval from the Yearly Meeting clerk in advance.

Friends wishing reimbursement should use the Travel Expense Reporting Form, which appears in Appendix E of this manual and on LEYM's website. The filled-in form and ~~attached~~ receipts should ~~be mailed or given~~ sent to the treasurer.

Yearly Meeting officers, representatives, and committee members who do not request reimbursement are still asked to submit to the treasurer reports of out-of-pocket and in-kind expenses such as travel, ~~long distance telephone charges~~, and postage, so that the cost of conducting Yearly Meeting business may be accurately known.

Appendix E, Travel Expense Form

LAKE ERIE YEARLY MEETING TRAVEL EXPENSE FORM

Name and address: _____

For any item that is a donation in kind to LEYM, please check the Donation box.

1. Purpose of travel (e.g., meeting attended) _____

2. Dates of travel _____

3. Auto transportation

From _____ to _____ miles at 21 cents = \$ _____ Donation ☐

From _____ to _____ miles at 21 cents = \$ _____ Donation ☐

Note: the incremental portions of mileage reimbursements above the 14 cents per mile standard charitable mileage expense rate are includable in the taxable income of the volunteer.

4. Plane fare, other public transportation, and/or highway tolls. Submit copies of plane tickets or other major items.

Itemize below:

_____ \$ _____ Donation ☐

_____ \$ _____ Donation ☐

_____ \$ _____ Donation ☐

5. Other travel-related expenses (**e.g., registration, lodging, and food for the registrant during the event**). ~~It is the policy of LEYM that Friends provide their own meals and find their own overnight accommodations, hopefully with Friends, leaving only the cost of travel itself to be covered by LEYM. However, if such~~ If cost-free accommodations cannot be found, and Friends feel that they require assistance in covering such costs in order to serve as LEYM representatives, the costs incurred are to be itemized below for reimbursement. Please include copies of receipts ~~of major expenses such as overnight accommodations~~.

_____ \$ _____ Donation ☐

_____ \$ _____ Donation ☐

_____ \$ _____ Donation ☐

Total to be reimbursed \$ _____

Total donation in kind \$ _____

Send to: Tom Kangas, 3641 Weston Pl., Columbus, OH 43214 or email to LEYMTreasurer@gmail.com