

Helminthological Society of Washington

EXPENSE REIMBURSEMENT POLICY

Executive Committee Approved; 9 Nov, 2024

1. *Purpose*

The Executive Committee of the Helminthological Society of Washington (HSOW) recognizes that Executive Committee members, officers, and employees ("Personnel") of HSOW may be required to travel or incur other expenses from time to time to conduct organizational business and to further the mission of this non-profit organization. The purpose of this Policy is to ensure that (a) adequate cost controls are in place, (b) travel and other expenditures are appropriate, and (c) to provide a uniform and consistent approach for the timely reimbursement of authorized expenses incurred by Personnel. It is the policy of HSOW to reimburse only reasonable and necessary expenses actually incurred by Personnel. When incurring business expenses, HSOW expects Personnel to:

- Exercise discretion and good business judgment with respect to those expenses.
- Be cost conscious and spend HSOW'S money as carefully and judiciously as the individual would spend his or her own funds.
- Report expenses, supported by required documentation, as they were actually spent.

2. *Expense Reimbursement Request*

In order to be reimbursed, the requesting individual must submit a written request to the Secretary/Treasurer by mail or email within 30 days of the completion of travel or incurring the expense. A travel expense reimbursement request should include:

- The individual's name, email, and mailing address.
- The date, origin, destination and purpose of the trip.
- An itemized list of all expenses for which reimbursement is requested.
- Written receipts for all expenses for which reimbursement is requested. Receipts should show the vendor's name, a description of the services provided (if not otherwise obvious), the date, and the total expenses, including tips (if applicable).

3. *General Travel Guidelines*

- A. *Advance Approval.*** All trips outside of those specifically listed below that involve air travel or at least one overnight stay must be approved in advance by the Executive Committee.
- B. *Personal and Spousal Travel Expenses.*** Individuals traveling on behalf of HSOW may incorporate personal travel or business with their HSOW-related trips; however, Personnel shall not arrange HSOW travel at a time that is less advantageous to HSOW or involving greater expense to HSOW in order to accommodate personal travel plans. Any additional expenses incurred as a result of personal travel, including but not limited to extra hotel nights, additional stopovers, meals or transportation, are the sole

responsibility of the individual and will not be reimbursed by HSOW. Expenses associated with travel of an individual's spouse, family or friends will not be reimbursed by HSOW.

- C. **Officer travel.** The Society will support one trip per year for the Editor in Chief and one Manuscript Editor to attend the Spring HSOW meeting, up to \$1,500 per person. The Society will also support travel and accommodations for the Treasurer, if necessary, to perform duties of the office.
- D. **Member or award winner travel:** All other travel by members or award winners for Society business must be approved by the Executive Committee.

4. ***Air Travel***

- A. **General.** Air travel reservations should be made as far in advance as possible in order to take advantage of reduced fares. HSOW will reimburse or pay the cost of the lowest coach class fare above basic economy (non-refundable ticket).
- B. **Frequent Flyer Miles and Compensation for Denied Boarding.** Personnel traveling on behalf of HSOW may accept and retain frequent flyer miles and compensation for denied boarding for their personal use.

5. ***Lodging***

Personnel traveling on behalf of HSOW may be reimbursed at the current fiscal year GSA rate (<https://www.gsa.gov/travel/plan-book/per-diem-rates>) for reasonable hotel accommodations. Convenience, the cost of staying in the city in which the hotel is located, and proximity to other venues on the individual's itinerary shall be considered in determining reasonableness. Personnel shall make use of available corporate and discount rates for hotels. "Deluxe" or "luxury" hotel rates will not be reimbursed.

6. ***Meals and Incidentals***

Personnel traveling on behalf of HSOW are reimbursed for the reasonable and actual cost of meals (including tips) according to the current fiscal year GSA rates (<https://www.gsa.gov/travel/plan-book/per-diem-rates>). In addition, reasonable and necessary gratuities that are not covered under meals may be reimbursed. See a list of non-reimbursable incidentals below.

7. ***Ground Transportation***

Personnel and invited speakers are asked to use the most economical ground transportation available and appropriate under the circumstances. Approved ground transportation include:

1. Hotel Courtesy Cars or shuttles
2. Airport shuttle or bus
3. Taxi
4. Hired car service (Uber, Lyft, or similar)
5. Rental Cars. Only with prior approval.

8. *Personal Cars*

Personnel are compensated for use of their personal cars when used for HSOW business. When individuals use their personal car for such travel, including travel to and from the airport, mileage will be allowed at the currently approved IRS rate per mile. In the case of individuals using their personal cars to take a trip that would normally be made by air, mileage will be allowed at the currently approved rate; however, the total mileage reimbursement will not exceed the sum of the lowest available round trip coach airfare. A Google map showing the route and mileage must be submitted with the request for reimbursement.

9. *Parking/Tolls*

Parking and toll expenses, including charges for airport and hotel parking, incurred by Personnel traveling on HSOW business will be reimbursed. The costs of parking tickets, fines, car washes, valet service, etc., are the responsibility of the employee and will not be reimbursed. Only Economy (long-term or off-site) airport parking is permitted.

10. *Non-Reimbursable Expenditures*

HSOW maintains a strict policy that expenses in any category that could be perceived as lavish or excessive will not be reimbursed, as such expenses are inappropriate for reimbursement by a nonprofit, charitable organization. Expenses that are not reimbursable include, but are not limited to:

- Travel insurance.
- First class tickets or upgrades.
- Limousine travel.
- Movies, liquor or bar costs.
- Spa or exercise charges.
- Valet service.
- Car washes.
- Toiletry articles.
- Expenses for spouses, friends or relatives.
- Housesitting services

11. *REVIEW OF POLICY*

This policy will be reviewed at least every two years and recommendations for amendments will be approved by The Executive Committee.