



VOLUNTEER LEADER TRAVEL POLICY

Overview:

The TMS Volunteer Leader Travel Policy is directed toward minimizing travel expenses in order to maximize use of the society's financial resources for the professional growth of its members. To this end, volunteer leaders who are duly authorized to travel for TMS are asked to seek non-TMS support as the primary method to cover their travel expenses. In addition, volunteer leaders are encouraged to schedule meeting dates and locations to minimize expenses to TMS. Whenever practical, TMS meetings should be held at TMS Headquarters or at either the Annual Meeting or MS&T to minimize overall meeting expenses.

It is recognized that in certain cases, TMS volunteer leaders will need to travel on behalf of the society and will not be able to secure non-TMS support. In these cases, TMS will support the travel of volunteer leaders according to the procedures outlined below.

Budgeting and Approval Processes:

Budgeting for volunteer leader travel will be conducted in concert with the development of the overall TMS operating budget for the upcoming calendar year. Staff will work with the TMS Executive Committee to develop a listing of trips for which TMS volunteer leaders will require expense reimbursement. This will include the name of the event, who is attending, and a projected cost for budgetary purposes. The proposed volunteer leader travel budget will be approved by the Executive Committee as a component of the approval of the overall TMS budget according to the financial planning policies of the society.

It is recognized that, during the course of a year, needs for volunteer leader travel arise that were not anticipated in the development of the annual budget. In these situations, the volunteer leader travel will make a request in writing to the TMS Executive Director detailing the event and purpose for their attendance as well as projected expense. The Executive Director will review the request in light of the volunteer leader travel budget. If the request would result in an executive travel budget overage of 10% or less, the Executive Director can approve the travel and inform the Executive Committee of such approval. If the request will create a projected overage of more than 10%, the request will be forwarded to the Executive Committee for review. The Financial Planning Officer will make a recommendation to the Executive Committee in light of the society's overall budget status. Approval of the Executive Committee is required before authorization for the volunteer leader travel is given.

Procedures for Expense Reporting:

- Dates, amounts and locations where expenditures were made must be indicated on an expense report form provided by TMS Headquarters for all items for which reimbursement is sought.
- Air travel in coach class (economy fare) is authorized. For flight segments exceeding six (6) hours in duration, the equivalent of “economy plus” of airfare is authorized. Where possible, travelers are urged to take advantage of super saver airfares and discounts.
- Reasonable meal expenses will be reimbursed for the cost of meals customary to the particular location.
- Any travel to be expensed to or reimbursed by TMS must be documented via the submission of a society expense report. Supporting this report must be documentary evidence for all expenditures, excluding cash tips that are reasonable in nature. Documentary evidence includes itemized receipts, itemized paid bills, credit card receipts or similar evidence and will usually be considered adequate to support an expenditure if it shows the amount, date, place and essential character of the expenditure.
- Only direct travel expenses incurred by the individual member authorized for TMS travel will be reimbursed. Expenses of accompanying guests will not be reimbursed. Personal expenses incurred to travel will not be reimbursed. (This includes such things as baby-sitters, house care, cocktails, in-room movies, laundry/valet, spa fees, etc.).
- When a personal automobile is used for transportation on TMS business, reimbursement will be at the then current IRS mileage reimbursement rate.
- Rental cars will not be reimbursed unless their use (including gas and any associated tolls and parking fees) would cost less than other ground transportation, or if other ground transportation is not available.
- The TMS Past President shall review and approve the expense reports of the TMS President. The expense reports of other will be reviewed and approved by the TMS President.
- Upon approval, expense forms should be returned to the attention of the Executive Director at TMS Headquarters for reimbursement. Approved expense report forms for reimbursement should be submitted within two weeks of travel except under special circumstances.