



## Travel Policy

### 1. Scope:

- a. Region G has established a travel fund to provide assistance for professional and collegiate members to attend events at the Society and Regional level. The travel policy serves the role of enforcing fiscal responsibility. The policy is in place to preserve funds for future members and to promote attendance at present events.

### 2. Assumptions:

- a. The maximum amount of money available is that approved in the Region G budget.
- b. Region resources are limited and the stipend will not fully cover all travel expenses of all eligible participants.
- c. Members must first determine if funding from their employers, university, or section can be obtained to defray the cost of attending conferences prior to applying for Region funds. All other options must be exhausted.

### 3. Eligibility (order of allocation preference):

- a. Professional
  - i. Region Governor (or Lieutenant Governor if acting for Governor)
  - ii. Region Senators
  - iii. Region Officers: Lieutenant Governor, Treasurer, Secretary
  - iv. Region Council Members
  - v. Section Presidents
  - vi. Section Officers
  - vii. Award Recipients
  - viii. SWE Members
- b. Collegiate
  - i. Region Collegiate Senator (RCS)
  - ii. Region Collegiate Representative (RCR)
  - iii. Region Collegiate Communications Editor (RCCE)
  - iv. Section Presidents
  - v. Section Officers
  - vi. Award Recipients
  - vii. SWE Members

### 4. Reimbursable Expense Guidelines:

*Note: every attempt should be made to obtain lowest rates for travel and lodging*

- a. The actual cost of airfare or rail-fare to the site of the meeting. If transportation to the meeting is by automobile, reimbursement is at the current IRS approved charitable rate. The traveler should submit the mileage traveled to and from the event. If the cost of mileage exceeds the cost of air transportation to the meeting, reimbursement will be capped at the cost of air transportation.
- b. Lodging required will be reimbursed at the rate of ½ of a double room for professionals and collegiates or actual cost (if 4 share a room, reimbursement will be ¼ of a room).
- c. Basic conference or event registration fee will be covered (not extra tours, meals, other additional fees).
- d. Airport parking, site parking, tolls, and public transportation are reimbursable.
- e. Other expenses such as meals, phone calls, and incidentals are NOT reimbursable.



5. Process:

- a. Pre-approval by Region Treasurer and Governor is required. The Governor and Treasurer have the authority to set a deadline for travel grant applications for events. Any application received after the deadline will not be considered for funding for that event.
- b. The requester shall complete the form: *Region G Travel Grant Application Form*. The application requires an estimate of travel expenses and explanation of need.
- c. The application should be submitted to the Region Treasurer ([Region\\_G\\_Treasurer@swe.org](mailto:Region_G_Treasurer@swe.org)) with a copy submitted to Region Governor ([Governor-G@swe.org](mailto:Governor-G@swe.org)). Early applications are encouraged to obtain lowest airfare and applications may be accepted on a first-come, first-serve basis. Members are encouraged to apply for a grant, even if travel plans are not firm.
- d. Region G Governor and Treasurer shall review all applications and notify the applicant of acceptance or rejection of the application. If accepted, there will be notification of the stipend amount.
- e. The applicant should continue to seek funding other than or in addition to Region G funding. If funds become available from other source(s), the applicant shall notify Region G Treasurer of reduced need of Region G funding.
- f. Pre-approved members shall submit a request for reimbursement via the *Region G Travel and Expense Form*. Receipts for the eligible expenses must be included. Submit the expense report form to the Region Treasurer within 30 days after the trip. Failure to submit the Travel Expense Form and receipts within 30 days of the end of the travel will result in forfeit of the grant.
- g. The expenses and reimbursements must be approved by the Treasurer prior to the issuance of checks. Any exceptions must be approved by the Governor.
- h. Grant recipients are encouraged to cash the reimbursement check immediately after receipt. Checks must be cashed within 6 months of the issue date or the grant will be forfeited.
- i. Reimbursements are limited to the funds allocated in the Region G budget and are subject to change by a vote of the Region G Council. Un-used funds are retained by Region G.

6. Responsibility

- a. The Region G Governor and Treasurer have ownership responsibility of this Travel Policy and Expense Form documentation.

7. Revisions

REVISION	DATE	AUTHORS	CHANGES	REGION COUNCIL APPROVAL
0	November 2008	Judith Simmons Mary Ann Walsh	Original Release	<i>unknown</i>
1	February 2014	Melissa Lindsey Samantha Krueger Virginia Brandt Lisa Rimpf	Document consolidation, verbiage alignment, overall simplification, form changes.	02/22/2014
2	June 2015	Virginia Brandt Lisa Rimpf Jamie Tylicki	Added statements on the forfeit of grant and other clarifications of the policy	06/01/2015



**Travel Grant Application Form**

<b>Traveler Name</b>		<b>Date</b>	
<b>Section/MAL</b>			
<b>Phone</b>			
<b>E-Mail</b>			
<b>Address – the reimbursement check will be sent to this address</b>			
<b>Trip Purpose</b>			
<b>Location of Event</b>			
<b>SWE Eligibility Category (see 3. Eligibility)</b>			
<b>Is there a group from your Section/MAL traveling to the event?</b>	<input type="checkbox"/> yes	<b>Will you be traveling with the group?</b>	<input type="checkbox"/> yes
	<input type="checkbox"/> no		<input type="checkbox"/> no
<b>Estimated Expenses (\$)</b>	<b>Transportation (mileage reimbursed at the charitable rate):</b>		
	<b>Airfare:</b>		
	<b>Hotel/Lodging:</b>		
	<b>Conference/Registration Fee:</b>		
	<b>Total Estimated Expenses:</b>		
<b>Expenses To Be Covered</b>	<b>By Requester:</b>		
	<b>By Section/MAL:</b>		
	<b>Other Funding Sources (describe):</b>		
<b>Other Relevant Information</b>			

<i>Approval</i>	<input type="checkbox"/> yes	<i>Grant Amount Authorized</i> \$	
	<input type="checkbox"/> no		
<i>Reason For Rejection</i>			
<i>Region G Governor Approval</i>	<input type="checkbox"/>	<i>Date</i>	
<i>Region G Treasurer Approval</i>	<input type="checkbox"/>	<i>Date</i>	



**Travel Expense Form**

<b>Traveler Name:</b>		<b>Submission Date</b>	
<b>Section/MAL:</b>			
<b>SWE Eligibility Category:</b>			
<b>Trip Purpose:</b>			

<b>Dates:</b>								<b>Totals</b>
<b>Location(s):</b>								
<b>Expenses</b>								
<b>Conference/Registration Fees</b>								\$0.00
<b>Transportation</b>								
<b>Airfare</b>								\$0.00
<b>Ground Transportation/Mileage</b>								\$0.00
<b>Parking, Tolls</b>								\$0.00
<b>Lodging</b>								
<b>Hotel</b>								\$0.00
<b>Totals:</b>	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	<b>\$0.00</b>

All receipts should be attached to this form. Electronic versions (scan or fax) are acceptable.

Submit form to the Region G Treasurer ([Region\\_G\\_Treasurer@swe.org](mailto:Region_G_Treasurer@swe.org)) with a copy to the Region Governor ([Governor-G@swe.org](mailto:Governor-G@swe.org)).

This form with receipts should be submitted as soon as possible after travel is conducted and within 30 days of the end of the travel.