# SWE Region G Travel Policy

1. **Scope:** Region G has established a travel fund to provide assistance for professional and collegiate members to attend events at the Society and Region level. The travel policy serves the role of enforcing fiscal responsibility. The policy is in place to promote attendance at SWE events.
2. **Assumptions:**
	1. The maximum amount of money available is that which is approved in the Region G budget.
	2. Region resources are limited and the stipend is not intended to fully cover all travel expenses of all eligible participants.
	3. Members must first determine if funding from their employer, 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):**

|  |  |
| --- | --- |
| **PROFESSIONAL MEMBERS** | **COLLEGIATE MEMBERS** |
| 1. Region Governor or Lt. Governor if acting on behalf of the Governor
 | 1. Region Collegiate Senator (RCS)
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| 1. Region Senators
 | 1. Region Collegiate Representative (RCR)
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| 1. Region Officers: Lt. Governor, Treasurer, Secretary
 | 1. Region Collegiate Communications Editor (RCCE)
 |
| 1. Region Council Members
 | 1. SWEFLs
 |
| 1. Leadership Coaches
 | 1. Leadership Coaches
 |
| 1. Section Presidents
 | 1. Section Presidents
 |
| 1. Section Officers
 | 1. Section Officers
 |
| 1. Award Recipients
 | 1. Award Recipients
 |
| 1. SWE Members
 | 1. SWE Members
 |

1. **Reimbursable Expense Guidelines:**

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

* 1. 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.
	2. Lodging required will be reimbursed at the rate of one-half of a double room or the actual cost. For example, if 4 people share a room, reimbursement will be one-quarter of the room rate.
	3. Basic conference or event registration fee will be covered. Tours, meals, other additional fees are not covered.
	4. Airport parking, site parking, tolls, and public transportation are reimbursable.
	5. Meals, phone calls, and incidentals are NOT reimbursable.
1. **Process:**
	1. 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.
	2. The requester shall complete the form: *Region G Travel Grant Application Form.* The application requires an estimate of travel expenses and funding sources.
	3. The application shall be submitted to the Region Treasurer (Region\_G\_Treasurer@swe.org) with a copy submitted to Region Governor (Governor- G@swe.org) by the set deadline. Early applications are encouraged, 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.
	4. 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.
	5. The applicant should continue to seek funding other than or in addition to Region G funding.  If funds become available from other sources, the applicant shall notify the Region G Treasurer of reduced need of Region G funding.
	6. 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. Expense report forms shall be submitted to the Region Treasurer within 30 days of returning from the trip. Failure to submit the Travel Expense Form and receipts within 30 days of the end of the travel will result in forfeiture of the grant.
	7. The expenses and reimbursements must be approved by the Treasurer prior to the issuance of checks. Any exceptions must be approved by the Governor.
	8. Grant recipients are encouraged to cash the reimbursement check immediately after receipt. Checks must be cashed within 3 months of the issue date or the grant will be forfeited.
	9. 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. Unused funds are retained by Region G.
2. **Responsibility**
	1. The Region G Governor and Treasurer have ownership responsibility of this Travel Policy and Expense Form documentation.

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| --- | --- | --- | --- | --- |
| Revision | Date | Authors | Changes | Approval by Region Council |
| 0 | November 2009 | Judith SimmonsMary Ann Walsh | Original |  |
| 1 | February 2014 | Melissa LindseySamantha KruegerVirginia BrandtLisa Rimpf | Document consolidation, verbiage alignment, overall simplification, form changes | February 22, 2014 |
| 2 | June 2015 | Virginia BrandtLisa RimpfJamie Tylicki | Added statements on the forfeit of grant and other clarifications of policy | June 1, 2015 |
| 3 | December 2017 | Margaret AdriaticoMarilyn Reeder | Updated branding, added Leadership Coaches and SWEFLs to eligibility list, form changes for ease of reporting | December 11, 2017 |

SWE Region G travel grant application for WELocal

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** |  | **SWE Role** |  |
| **Email** |       | **Phone Number** |       |
| **SWE Section** |  | **SWE Member #** |  |

**Which WELocal event(s) are you planning to attend? (you may check more than one)**

|  |  |
| --- | --- |
| [ ]  | **Tulsa – January 26-28, 2018** |
| [ ]  | **Phoenix – February 23-25, 2018** |
| [ ]  | **Milwaukee – March 9-11, 2018** |
| [ ]  | **Portland – April 6-8. 2018** |
| [ ]  | **Providence – April 20-22, 2018** |

**ESTIMATED EXPENSES**

|  |  |  |
| --- | --- | --- |
| CATEGORY | SUB CATEGORY | AMOUNT |
| TRANSPORTATION | AIRFARE | $      |
|  | TAXI/UBER | $      |
|  | MILEAGE (14 cents per mile) | $      |
|  | VEHICLE RENTAL | $      |
| HOTEL/LODGING |  | $      |
| CONFERENCE FEES |  | $      |
| TOTAL (please sum the amounts) | $      |

**ESTIMATED FUNDING AND SOURCES**

|  |  |
| --- | --- |
| SOURCE | AMOUNT |
| COMPANY OR UNIVERSITY | $      |
| SWE SECTION | $      |
| OTHER – PLEASE EXPLAIN       | $      |
| TOTAL (please sum the amounts) | $      |

**HOW MUCH ARE YOU REQUESTING FROM REGION G?**

|  |  |
| --- | --- |
|  | AMOUNT |
| REGION G FUNDING REQUESTED (LIMIT $250) | $      |

Deadline for 2018 WELocal Travel grant applications is 11:59 pm on Tuesday, January 30, 2018. Submit applications to the Region Treasurer (Region\_G\_Treasurer@swe.org) with a copy to the Region G Governor (Governor-G@swe.org).

**Fill this out after you return from the trip**

SWE Region G travel EXPENSE FORM

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** |  | **Date** |  |
| Address where you would like the check mailed: |  |

**Which WELocal event(s) did you attend?**

|  |  |
| --- | --- |
| [ ]  | **Tulsa – submit expense report by February 28, 2018** |
| [ ]  | **Phoenix – submit expense report by March 28, 2018** |
| [ ]  | **Milwaukee – submit expense report by April 11, 2018** |
| [ ]  | **Portland – submit expense report by May 11, 2018** |
| [ ]  | **Providence – submit expense report by April 22, 2018** |

**EXPENSES**

|  |  |  |
| --- | --- | --- |
| CATEGORY | SUB CATEGORY | AMOUNT |
| TRANSPORTATION | AIRFARE | $      |
|  | TAXI/UBER | $      |
|  | MILEAGE (14 cents per mile) | $      |
|  | PARKING | $      |
|  | VEHICLE RENTAL | $      |
| HOTEL/LODGING |  | $      |
| CONFERENCE FEES |  | $      |
| TOTAL (please sum the amounts) | $      |

**HOW MUCH IS BEING REIMBURSED BY REGION G?**

|  |  |
| --- | --- |
|  | AMOUNT |
| REGION G FUNDING ALLOTMENT | $      |

All receipts for reimbursable expenses should be sent along with this form. Electronic versions of receipts (scans, PDF, images) are acceptable. Submit the expense form and receipts to the Region G Treasurer (region\_G\_treasurer@swe.org) with a copy to the Region G Governor (governor-G@swe.org). Deadline for expense reports is 30 days after the event. Late expense reports will not be accepted.