



# SME Volunteer Travel Guidelines & Reimbursement Policy

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## Policy and purpose

Designed to establish SME volunteer Travel and Business Expense Reimbursement standards.

The policy provides guidelines for all volunteer members.

SME will reimburse authorized volunteers for all necessary and reasonable expenses incurred in the course of traveling or conducting the business of the organization.

Volunteers are expected to:

- Act appropriately, ethically and professionally, at all times, in handling the resources of the organization.
- Be reasonable when spending money or using resources in connection with travel and business expenses undertaken for the benefit of the organization.
- Be responsible for ensuring all SME related expenses comply with this policy.

Any person that does not adhere to this policy, falsifies a report or attempts to obtain reimbursement for expenses not in compliance with this policy may be subject to legal or disciplinary action, up to and including expulsion from the organization.

SME travel reimbursement requires:

- Completion of an Expense Report.
- Submission within 30 days of the activity.
- Use of Concur software is preferred.
- An itemized receipt should be provided for each expense, unless one is not available from the vendor. Expenses of \$10 or more should include an itemized receipt or a “Missing Receipt Declaration”.
- Actual, itemized receipts for Hotel, Airline & Rental Car are requested – Missing Receipt Affidavit is not accepted for these expense types. A replacement copy of the receipt can be sourced from the vendor.
- Please submit a maximum of ONE Expense Report per month.
- Multiple events can be combined into a single submission.



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## Expense Reports – Concur

SME volunteers are requested to use the web-based expense reporting tool Concur. To request a Concur account set up, please contact the SME CFO. Concur is easy to use, has a mobile app, and is web-based, making it easily accessible.

Using Concur, your paper receipts are not needed. Receipts can be scanned, or a picture taken of the receipt with your smartphone and attached to the relevant item in your expense report. Please ensure to enclose the Itemized receipt detailing the items purchased and to complete the details of the purpose and the persons that the purchase relates to. This will expedite the processing and reimbursement.

To help us in processing your expense report more efficiently, please attach the receipts to the corresponding line item in your Expense Report.

Instructions for using Concur are found in the enclosed pdf file:



Concur\_ExpenseRe  
port2019.pdf

Please do not use your SME profile on the Concur app or website to book personal travel.

## Reimbursement Expense Report Deadlines/Turnaround Time

Expense Reports are reviewed by Concur Audit, followed by the SME approval completed by an authorized member of SME Staff. SME Finance will review policy adherence, tax implications and account coding before initiating reimbursement.

Generally, completed reports processed prior to 4.00pm on Tuesday will be paid by the end of that week. Those completed after 4:00 p.m. on Tuesday are paid the following week.

Concur has been contracted to audit all expense reports and return, unprocessed, all Expense Reports that do not comply with SME's policies and guidelines.

## Direct Deposit of Expense Reimbursement

Direct deposit of expense reimbursement is available. Please provide SME Finance with a blank, voided personal check.



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## Emergency Travel Assistance

SME provides emergency travel support when travelling on SME business; policy and contact information is provided below:

### Zurich Travel Assist®

Providing access to emergency medical, informational, legal, security and personal assistance while traveling away from your principal residence.



A1-112009120-C (10/19) 112012865

<p><b>Policy number:</b> GTU 8631432</p> <p><b>Company name:</b> Society of Manufacturing Engineers</p>	<p>For emergencies and live support in the U.S. and Canada, call 800-263-0261. Anywhere else in the world call collect at 1-416-977-0277 or fax 1-416-205-4622. <i>When calling please identify yourself as an insured of Zurich in North America.</i></p> <p>For general travel information and intelligence visit <a href="http://zurichtravelassist.com">zurichtravelassist.com</a></p>
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## Zurich Travel Assist® Services include the following:

### Medical Assistance

- Emergency Medical Referrals
- Medical Monitoring
- Medical Evacuation/Repatriation\*
- Non-Medical Repatriation\*
- Hospital Admissions
- Medical Payment Advancement
- Prescription Assistance
- Visit to Hospital by Family or Friend\*
- Repatriation of Remains\*
- Escort of Injured during Transport
- Dispatch of a Physician or Specialist

### Information Assistance

- Passport & Visa Information
- Weather, Cultural & Currency Exchange
- Embassies and Consulates (Addresses and Telephone Numbers)
- Travel Advisories
- Inoculation & Immunization

### Personal Assistance

- Lost Baggage Service
- Translation & Interpretation
- Emergency Messaging
- Emergency Ticket Replacement
- Lost Document Replacement
- Emergency Advancement of Funds
- Return of Vehicle

### Legal Assistance:

- Legal Referral
- Advance of Bail

\* The program will cover certain costs associated with these travel services, subject to the stated limitations.

**Visit the Zurich Travel Assist® website: <http://www.zurichtravelassist.com>**



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## **Travel Guidelines & Reimbursement Policy**

### **Airfare**

Air travel is to be booked in coach class or other less expensive class, with the exception of the President - the highest-class being business comfort.

Volunteers are strongly encouraged to book early to obtain the lowest airfares possible.

Documentation for airfare reimbursement is required. Attach the printed receipt or the passenger receipt of the ticket to your expense report.

Fees for seat upgrades or preferred seating are not reimbursable expenses. However, on Southwest Airlines only, it is allowable to purchase the Early Bird Check-In fee when no baggage fees are charged.

E-credits will not generally be reimbursed where used for airfare. Please contact SME CFO in advance before booking any SME ticket with e-credit.

### **Hotel/Lodging**

Reimbursable lodging expenses include only the room charge, plus sales/use taxes relating to the room itself. In selecting hotel properties, please choose appropriately priced business style hotels.

Other charges that may appear on the hotel bill, such as meals, valet, etc., must be reported separately from lodging on the appropriate line on your Expense Report (if reimbursable). An itemized statement from the hotel must be included with the Expense Report.

When visiting SME Headquarters, SME has negotiated hotel rates with several local hotels. In order to utilize our tax exemptions, bookings may need to be placed centrally through SME. Please check with your contact at SME Headquarters before booking.

### **Meals / Business Entertainment**

Tip amount should be written on receipts so full amount on receipt matches actual charge.

If Staff members are present with the volunteer(s), generally the most senior staff member should pay for all meals and business entertainment.

If no staff members are present at the event, the most senior volunteer should pay.

Reasonable alcoholic beverage expenses are reimbursable if they are included as part of a meal expense.

### **Gratuities**

The following guidelines for gratuities will be accepted for reimbursement:

- Private car service up to 20% of total fare (service fee typically includes a tipping charge).
- Cabs up to 10% (20% for high cost cities) of total fare or rounded-up to nearest dollar.
- Door Attendant - \$2.00 for hailing taxi plus tip for help with luggage.
- Hotel porter - \$1.00 per bag.



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- Housekeeping - \$2.00 per day.
- Parking - \$2.00 for valet parking (valet parking should not be used unless there is a concern for individual safety or no other option is available).
- Restaurant tip must not exceed 20% of the cost of the meal.
- Shuttle drivers - \$2.00.

Any tips not appearing in the regular transaction, such as cash tips, should be itemized in the expense report in the comments section.

## Mileage Expenses

For local business travel, mileage reimbursement at the IRS rate will be used.

Mileage should be calculated and added to the Concur expense report using the mileage waypoints feature. Volunteer members will not need to use the functionality in Concur to deduct standard commute as they are not SME employees.

The mileage reimbursement is intended to cover all costs of using your personal vehicle for business travel. No other expenses will be reimbursed.

The mileage reimbursement rate for use of your personal vehicle is based on the IRS allowable rate for 2023 of 65.5 cents/mile. In Canada, the allowable rate is 68 cents/km for the first 5,000 km driven and 62 cents per km thereafter.

For out-of-town travel, total journey cost, as well as convenience should be considered when deciding whether to drive (personal car vs. rental car) or fly. SME reserves the right to only reimburse you for reasonable travel costs (e.g. lesser cost of flying vs. excessive mileage).

As a rough guideline, trips averaging more than 75 miles per day should consider a rental car. But the exact decision will be based complex factors of time, distance and availability.

## Rental Cars

SME's preferred Rental Car Companies are Enterprise, Budget, and Hertz. For travel in the U.S. and Canada, SME provides liability coverage that includes physical damage to any hired or rented vehicles.

In the event of an accident in your rental car, call Kapnick Insurance Group (Claim Manager Rob Darby 734-929-6049 or [rob.darby@kapnick.com](mailto:rob.darby@kapnick.com)) and notify your SME manager as soon as practical.

When making the decision whether to rent a car at your destination, be sure to consider if the miles you intend to drive warrant a rental car or if other ground transportation would be more economical. The use of rental cars is justified only when their use would cost less than other ground transportation, or if other ground transportation is not available.

Do NOT purchase additional insurance; this expense will not be reimbursed by SME.

When renting a vehicle, use of pre-purchased or Fuel Service Option (FSO) are not reimbursable.



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For liability reasons, the use of rental vehicles while traveling overseas (not including Canada) is strongly discouraged. If rental vehicles must be used overseas, we strongly recommend you purchase full coverage insurance from the rental agency. SME's insurance coverage cannot be used overseas. The additional expense for full coverage, for overseas car rental only, is reimbursable.

The following are guidelines to help you select the most cost-efficient size of rental car:

Number of people traveling	Size/Class of rental car
1	Economy, Compact or Intermediate
2 or 3	Intermediate or Full Size
4	Full Size

SME will not reimburse for the rental of cars classified as: Premium, Luxury, Minivan, Sport Utility Vehicle, Jeep, Pickup Truck or other specialty vehicles. Exceptions to this rule may be granted by an authorized appropriate member of SME staff, CEO or President in cases of unusual amounts of equipment or people being transported.

## Transportation (Parking, Tolls, Taxi, Bus)

Parking and tolls are reimbursable expenses when traveling on SME business. Long term airport parking will be reimbursed when air travel is required.

Other transportation fares are reimbursable when incurred while conducting SME business.

## Non-Reimbursable Items:

- Expenses involving the rental or cleaning of formal wear.
- Upgrades on airline tickets or changes resulting in a higher class of service and segment upgrades
- Airline club memberships
- Fees for additional baggage (over two) or baggage weighing over 50 pounds
- Theft, loss or damage to luggage and other personal property
- Any additional change fees for personal travel combined with business travel
- In-flight airline movies, audio and alcohol purchases
- In-room movies
- Room service food, snacks (unless exceptional circumstances to approved by SME)
- Alcoholic drinks or snacks purchased from the in-room minibar
- Meals taken as an alternative to a SME-organized meal or event
- Dry cleaning on trips lasting seven days or less
- Fines, penalties and traffic tickets imposed for the violation of traffic laws while operating rented vehicles
- Boots and towing of the rental car
- Travel insurance or additional insurance purchased on rental cars for use in the U.S. and Canada
- Fuel obtained at a rental car agency, including the pre-purchased fuel option



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- Traffic fines or penalties
- Medical insurance coverage and optional collision insurance
- Meals purchased before the business trip begins or once the business trip is completed
- Personal items including clothing, toiletries, shoeshine, shoe repairs, haircuts, shaves, personal reading material or entertainment while traveling
- Insurance, repairs, maintenance, car wash or gasoline purchases for personal vehicles
- Alcohol-only expenses
- Tobacco products
- Personal subscriptions to newspapers, magazines, and trade journals
- Personal gifts
- Payments to charities, worthy causes or fundraisers
- Babysitting, child care fees and kennel costs for dogs and/or other pets
- Costs considered to be excessive in relation to the activity concerned

SME is NOT liable for personal items left at a show/event, airport, hotel, in the office, or anywhere else.

SME is NOT liable for automobile repairs, towing charges, traffic tickets, loss or theft of vehicle/contents or insurance deductibles while using your personal vehicle on SME business.

## **Please note:**

Any expenses not specifically covered in this policy should not be construed as reimbursable. These types of expenses are subject to final approval by an authorized member of SME staff, CEO and President. It is recommended that such items receive advance approval.

## **Family Expenses**

Expenses of spouses and other family members are generally considered personal and will not be reimbursed. Please seek prior approval from the Manager of Governance in any exceptional circumstances.

## **Combining trips**

SME is happy for you to combine your volunteer activities with other non-SME activities, such as vacation or other, non-related, business. However, SME will only reimburse for the costs of travel related to the SME activity. Additional hotel nights, additional flight legs, extra meals, etc. should not be claimed for reimbursement. Please separate and identify these costs appropriately in any expense claim.