

ADOPTED: 9/26/2023

Membership Expense Reimbursement Policy

The rules governing the control for necessary expenses for members on Association business as authorized by the Executive Board shall be as follows:

Conferences:

1. Conference registration is the responsibility of the attendee. Registering for any approved conference is an acknowledgement that you will travel to the conference location and that you will participate in all parts of the Conference, which usually includes sessions on Saturday and Sunday.
2. The conference registration confirmation email must be submitted to the PETA President and Treasurer or designee. Conference registration cost shall be remitted directly to CTA by the PETA Treasurer or designee.
3. Conference attendance through the Association is an agreement by the member to fully participate in the conference they attend and report out highlights of the sessions they attended verbally or in writing to the PETA Representative Council.
4. Should a member not fully participate in the conference, not attend the conference, not cancel before the cancellation period, or not report out to PETA Representative Council, PETA shall not allow further conference attendance through the Association for a period of one school year.

Accounting for Advances: Travel advances are not the norm and a request for advance travel payments may be submitted to the Executive Board. Such requests shall be determined at the next scheduled Executive Board meeting. If approved, all advances must be accounted for within thirty (30) days of the end of the travel period by utilizing the Member Expense Reimbursement form in which the advance amount is deducted from the reimbursement amount. Unused advance amounts must be included with the expense reimbursement.

Travel: Requires advanced approval from the Executive Board

1. PLANE: Actual, most economical coach fare (attach receipt)
2. TRAIN or BUS or TAXI: Actual Fare (attach receipt)
3. RIDESHARE (Lyft, Uber, etc.): Actual fare (attach receipt)
4. AUTO:

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- a. Standard IRS Business Mileage Rate (Currently \$0.655 per mile) with attached map and distance traveled printout (Google Maps, or similar)
- b. Mileage reimbursement cannot exceed the cost of coach plane fare
- c. Toll roads and bridges reimbursed at actual cost

Parking: Actual costs of airport parking and hotel parking, excluding valet parking.

Lodging: Due to the ongoing Covid concerns, PETA agrees to reimburse the full cost of a hotel room for authorized days of travel or conference attendance. Overnight lodging due to travel by automobile is not reimbursable.

Meals:

- a. Reimbursements are not allowed when a meal is provided by the local association, CTA Director, Service Center Council, CTA or NEA
- b. Meals due to travel by automobile are not reimbursable
- c. Actual meal amounts paid, including tax and tip, shall not exceed \$90.00 per day (CTA rate) and must include an itemized receipt
- d. Maximum tip reimbursable percentage is 20%
- e. Other Reimbursements: Require advance approval from the Executive Board

Filing Expense Reimbursements: A completed Member Expense Reimbursement Form must accompany any and all reimbursement requests, along with all receipts of expenses neatly attached to the Form. Any reimbursement requests with incomplete Member Reimbursement Forms or without attached receipts shall be returned to the requestor. All expense reimbursements must be filed with the PETA Treasurer or designee within thirty (30) days of the end of the month in which the expenses were incurred. An additional thirty (30) day period may be granted by the Executive Board for extenuating circumstances set forth in an attached letter to the expense reimbursement.

Appeals/Disputes/Exceptions: Members may on a timely basis appeal any dispute or exception of an expense reimbursement to the Executive Board. The Executive Board will make their determination on the appeal at its next regularly scheduled Executive Board meeting.