



TRAVEL AND EXPENSE REIMBURSEMENT POLICY

I. Purpose

It is the policy of the Coalition for Sonoran Desert Protection (“CSDP”) to provide reimbursement for employees and board members for pre-approved travel related expenses, including transportation, hotels, and food. All expenses must be reasonable and necessary, as well as job-related, and must be pre-approved in writing by the Executive Director. Private credit/debit cards of board members may be used to pay for approved expenses.

II. Documentation

CSDP will only reimburse for pre-approved travel related expenses when the employee or board member provides documentation of the expense with original receipts or invoices from purchases or other verifiable documentation. If a receipt is accidentally lost, the employee can submit the CSDP Lost Receipt Form.

III. Use of Travel and Expense Reimbursement Request form

Employees or board members seeking reimbursement must complete the “Travel and Expense Reimbursement Request form.” The form must be fully and accurately completed and submitted to the Executive Director. All receipts/invoices should be scanned/attached and submitted with the form. The employee or board member must account for the expenses within 60 days of incurring the expense. If the reimbursement is based on the federally approved per diem rate, the employee or board member must return any excess reimbursement no more than 120 days after receipt of reimbursement.

The Travel and Expense Reimbursement Request form shall include the following information:

1. Who incurred the expense? Issue payment to this person.
2. What was purchased? Original or digital receipts or invoices that describe what was bought, including the name and address of the vendor shall be required. If travel is involved, detailed descriptions of each element, such as mileage to and from the destination, shall be required. If the expenses include a meal, a list of everyone who shared the meal shall be required. The cost of alcoholic beverages shall not be an approved expenditure.
3. When and where did the expense occur? Original or digital receipts or invoices shall be required to confirm the dates and places involved.
4. What was the business purpose of the expense? A brief description of how the expense relates to CSDP's work shall be required.

IV. Local Travel

Local travel will be reimbursed through petty cash in accordance with applicable petty cash policies and procedures or through submittal of a Travel and Expense Reimbursement Request Form. Petty cash reimbursement is limited to \$20 or less in expenses. This includes reimbursement for transportation by taxi, car-for-hire service, and/or public transportation, and, when pre-approved, use of an employee's personal automobile. CSDP will reimburse employees for the use of their personal automobile in accordance with the federally approved mileage rate for business use of personal vehicles if the total miles traveled for the trip exceeds 25 miles.

V. Meals

Reimbursement of meals when there is no overnight travel should be paid by the organization only when the meal has a defined business purpose. Everyone who shared the meal shall be listed. The cost of alcoholic beverages shall not be an approved expenditure.

VI. Overnight Travel

For out-of-area overnight business travel, CSDP will reimburse all pre-approved travel related costs. Employees and volunteer board members may make their own travel arrangements and should travel at the lowest available airfare, if applicable, to accommodate the purpose of the business trip.