

SDCBA Reimbursement Policy for Non-Board Member Volunteers

The SDCBA greatly appreciates the service of its many volunteers, and is able to reimburse reasonable, documented travel expenses incurred for SDCBA business, pursuant to this policy. The SDCBA has a limited travel budget. So, employers and other sources able to cover the cost of travel expenses while providing volunteer services to the SDCBA should be a first resort. SDCBA will not reimburse travel expenses for non-board member volunteers other than for flight or hotel under any circumstances.

This policy covers all volunteers of SDCBA, including but not limited to, the SDCBA Board, committee members, speakers, invited guests, other volunteers, and contractors, who incur or seek reimbursement for out-of-pocket expenses incurred while conducting SDCBA business. This policy is in addition to the provisions of Section 1.3.16 which governs reimbursement of travel expenses for the President and President-Elect. To the extent that the two policies conflict, section 1.3.16 controls. Authorization from the Executive Director or his/her designee and the Board is required to make exceptions to these policies.

General Guidelines

- A. This document addresses the most common scenarios and issues for travel expenses, but it is not necessarily exhaustive. For any scenario or issue not specifically addressed, the SDCBA's Executive Director or his/her designee will interpret and apply this policy and any other applicable SDCBA policies. In addition to the specific policy guidelines described here, travel expenses must be reasonable, as compared to other similar travelers' expenses or other historical travel benchmarks. SDCBA's internal team reserves the right to cap, reduce, or deny a request for reimbursement or payment for any expense that is deemed either not in compliance with policy or is otherwise unreasonable.
- B. Notwithstanding the above, SDCBA will not reimburse travel expenses not approved in advance in writing by the Executive Director or his/her designee. Requests for pre-approval must include itineraries for the travel purpose (including dates and times), the requested flights (with rates), and any requested lodging (with rates), unless under extraordinary circumstances, which, in such case, may be approved only by the Executive Committee. Where possible, such as for recurring travel, requests for reimbursement must be made before the conclusion of the previous calendar year. This is necessary so that the SDCBA may budget as accurately as possible.
- C. Absent exceptional circumstances, requests for reimbursement may not be submitted until after the actual travel has occurred, regardless of when tickets were purchased or transactions occurred. The deadline for submitting a reimbursement request to SDCBA is 30 calendar days from the date the travel concludes. No reimbursement request to the SDCBA, other than by a member of the internal team, may be submitted without submitting a written report to the Board, through the Executive Director, regarding the activities conducted on the SDCBA's behalf in conjunction with the travel. Accordingly, if a written report is not submitted within 30 calendar days from the date the travel concludes, the travel will not be eligible for reimbursement.
- D. Travelers should travel economically, taking into account both monetary and time costs. The SDCBA will have a limited travel budget each calendar year. Once the travel budget is exhausted, no additional requests for reimbursement will be granted for that year, unless under extraordinary circumstances, which, in such case, may be approved only by the Executive Committee and only pre-travel.

Receipts are required for any expense over \$25.00

Air Travel

- A. Reimbursement for air travel will be limited to the cost of a refundable coach/ economy fare, plus the cost of checking up to one piece of luggage, if required. Lower cost non-refundable fares should be purchased if possible. All flights shall be reserved at least 45 days, when possible, before the travel is to occur and must be purchased 30 days in advance, though travelers are encouraged to book flights earlier in an effort to obtain more favorable rates. All reimbursement requests must include a copy of the reservation confirmation reflecting the date the reservation was made.
- B. First Class, Business Class, or Southwest Business Select fares (“Premium Fare”) are not permitted. If a Premium Fare ticket is purchased, the traveler must submit with the request for reimbursement a copy of the advertised rates for coach/economy fare on the date the reservation was made. Any difference between the coach/economy fare and the Premium Fare will be considered a personal expense and will not be reimbursed. Likewise, the cost of airline memberships, preferential seating, reserved seating, pre-boarding, or any other accommodation upgrade will be considered a personal expense and will not be reimbursed.

Lodging

- A. Travelers are expected to make reasonable efforts to schedule travel in a manner that minimizes the need for lodging. Lodging will not be reimbursed for days when an overnight stay is not required (e.g., for the evening before a conference/meeting where flights are available to permit timely arrival the day of or for the night a conference/meeting concludes where departing flights are available that evening).
- B. When lodging away from home is required to conduct SDCBA business, reimbursement for lodging expenses will be made for the actual cost of a standard single accommodation hotel room, not to exceed either \$250 per night or the contracted group rate, if one is provided.
- C. SDCBA will not reimburse expenses charged by the hotel beyond the room rate, taxes, and standard fees (such as resort fees). Specifically excluded expenses include telephone calls, internet charges, food and beverage, and business center expenses.

Travel Eligible for Reimbursement

Certain categories of travel are considered to be automatically approved. But these remain subject to the above conditions, including the timing and nature of the requests for pre-approval, requests for reimbursement, and reporting, and the limitations regarding the scope of expenses and amounts to be reimbursed. These automatically approved activities currently are:

- One member of the executive council of the National Conference of Bar Presidents
- One liaison to the Constitutional Rights Foundation Mock Trial Program
- Up to two delegates to the ABA House of Delegates
- Chair and vice chair of Legislative Committee to attend Conference of California Bar Associations