

## **SOCIETY POLICY**

### **TRAVEL EXPENSE REIMBURSEMENT**

#### **I. PREFACE**

- A. By-Law B4.4.6 states, "All payments for expenditures shall be made by the office of the Chief Financial Officer upon proper authorization, in accordance with the budget adopted by the Board of Governors."
- B. This Society Policy applies to categories of volunteer travel that may either be ASME business specific or related to ASME internal administration.
- C. As a learned technical society, ASME expects that members who participate in the activities of the Society will normally be responsible for the expenses that they incur as part of their participation. In return, member participation contributes strongly to the professional growth of the engineer. Employers of ASME members benefit greatly by the professional growth of their employees. Because of these benefits to both employer and employee, it is expected that the member will be able to obtain travel costs from his or her employer, his or her own funds, or from other sources.
- D. This Society Policy permits travel reimbursement for volunteers to those units where funding is available in the budget.
- E. ASME has developed this Society Policy to take care of those cases related to certain specific activities of the Society for which the member is not able to obtain funding for travel from his or her employer or other sources.

#### **II. PURPOSE**

- A. To explain the budget and expense reimbursement relationship.
- B. To list the limits of expense reimbursement.
- C. To establish the rules of qualification for an expense reimbursement.
- D. To list the eligibility for travel expense reimbursements.

#### **III. POLICY**

- A. The budget and expense reimbursement relationship.
  - 1. Funding for travel expense reimbursement shall be included in the annual budget of the Society. In selecting the timing and location of meetings, consideration shall be given to the travel cost to ASME, the travel cost to the member or their employer, and the time away from home required of the member. Meetings which can be scheduled to take advantage of low air travel rates shall be encouraged.

2. Control of travel expenses to ASME under this Society Policy is achieved by careful attention to the budget. During the preparation of the budget, each unit requests a certain amount of travel support for the activities under its control. When the budget is approved by the Board of Governors, ASME travel support for the specific unit activities is established for that budget year.

#### B. Permissible travel expenses

1. Transportation:  
People travelling to ASME authorized meetings are encouraged to find the least expensive practical means of travel, where alternative fares are available.
  - a. Travel by air: Large discount fares with penalties are encouraged where the probability of cancellation is low. Penalties for cancellation will be paid where authorized by the unit leader. Otherwise, round-trip coach should be utilized if available. When traveling internationally an upgrade to the next class of travel is acceptable if flying over 5 consecutive hours in a single segment, and if it is budgeted. Pre-approval by the Executive Director/CEO is required. If working under United States government contract, a United States-flag air carrier should be used when practical. Airfares will be reimbursed. Reasonable local fares between the airport and the meeting site will be reimbursed. An original itemized airline receipt, an e-ticket receipt or an internet receipt/statement is required for reimbursement. The receipt must show the traveler's name, the method of payment, and indicate that payment was made.
  - b. Travel by public ground transportation: Round-trip rail and/or bus fare will be reimbursed. Local fares between the transportation terminal and the meeting site will be reimbursed. Original receipts are required for rail, taxi, bus, and other modes of transportation if costs are \$25 or more for each occurrence.
  - c. Travel by private automobile: The mileage reimbursement rate for travel by private automobile is in accordance with United States Internal Revenue Service Guidelines, plus tolls and parking. Under non-emergency travel conditions, round-trips by private automobile shall not exceed 1600 kilometers or 1000 miles, unless it can be shown to be the most economical means of travel.
  - d. Travel by rental car: To be reimbursed at the same rate as for travel by private automobile. However, full costs may be included if no other transportation means are available. Carpooling should be encouraged. Commercial rental vehicles as a primary mode of transportation are authorized only if the rental vehicle is more

economical than any other type of public transportation, or if the destination is not otherwise accessible. Vehicle rental at a destination city is reimbursable. Original receipts are required for reimbursement. The rental agreement must clearly show the date and the points of departure/arrival, as well as the total cost. Drivers must adhere to the rental requirements, and restrictions must be followed.

## 2. Lodging & Meals

Actual reasonable sustenance and hotel room expenses for each day or major part of a day at the meeting or on official Society business. Approval may be given for additional days if this results in an overall reduction in travel reimbursement.

Where ASME has contracted a room block, the room charge, plus sales/use taxes related to the room itself, will be added to the master account and fully paid for by the sponsoring business unit and its budget.

Lodging required during any other meetings will be reimbursed at a reasonable rate, if permitted by the budget. Not reimbursed are Airbnb or similar organizations providing accommodations.

Reasonable expenses for meals and sustenance that are not offered during the meeting or conference are permitted. Original itemized receipts are required for expenditures over \$25.

## C. Rules for reimbursing a travel expense.

1. A travel expense may be reimbursed by ASME under the following conditions:
  - a. The person is not able to obtain funding elsewhere.
  - b. The person is among those eligible to receive a travel expense reimbursement because the activity they have completed is a budgeted activity.
  - c. A request for a travel expense reimbursement is submitted on an official ASME form and in accordance with the rules related to that form.
  - d. The Travel Expense Reimbursement Form is approved by a member of the ASME staff authorized to approve it. Final approval of the reimbursement is subject to the approval of the Executive Director/CEO.
  - e. The Travel Expense Reimbursement Form must be filed within 90 days of the completion of the activity. If the activity occurs at or near

the end of the fiscal year, the volunteer must notify their staff support before the end of the fiscal year they intend to file a report so that the staff member can file an accrual for the expense.

2. Every effort will be made to keep the unit and those eligible for travel reimbursement apprised of the status and availability of travel reimbursement funds for that activity for that period. Travel reimbursement cannot be made after the unit and those eligible have been notified that the travel budget has been committed and/or expended. All persons at the meeting in question shall be considered on the same basis, with the date the expense report is submitted not being a factor.

D. Eligibility for travel expense reimbursement.

Persons participating in the types of activities described as follows may be eligible to receive a travel expense reimbursement whenever travel funds are available in the budget. The budget will be the deciding factor in determining what activities have funding; each unit is encouraged to keep a list of desired activities to budget travel reimbursement in its Operation Guide. Final approval of the reimbursement is subject to the approval of the Executive Director/CEO.

1. Board of Governors meetings, retreat and indoctrination meetings as determined by the President and available in the budget.  
  
Guests who are specially invited by the President, the Board or the Executive Director/CEO to attend a meeting of the Board of Governors, except guests representing a unit of ASME, who shall be eligible for travel expense reimbursement from the travel budget of the represented unit.
2. Meetings of the Standing Committees of the Board of Governors, as defined in the Society By-Laws as determined by the Board of Governors as available in the budget.
3. Other travel authorized by the President, the Board of Governors, Executive Director/CEO, as available in the budget.
4. All Sector Meetings as determined by the appropriate Senior Vice President as available in the budget.
5. Nominating Committee.  
  
Voting Members, Alternates, Consultants (Past Chair and Past Vice Chair or designee), Past President Advisors to the Nominating Committee, as available in the budget.
6. Other organizations.

Representatives or delegates to other organizations as authorized by the President, Board of Governors, or the Executive Director/CEO as available in the budget.

Responsibility: Committee on Finance

Adopted: May 7, 1974

Renumbered from P-2.4: March 24, 1978

## Revised:

April 28, 1978	(editorial change, 6/99)
June 25, 1980	June 7, 2000
June 16, 1982	November 10, 2000
(editorial changes, 8/83)	(editorial change, 3/01)
March 21, 1984	June 12, 2002
June 20, 1986	(editorial changes, 9/02)
(editorial changes, 6/87)	November 22, 2002
December 18, 1987	(editorial change, 3/03)
June 16, 1988	(editorial change, 9/03)
(editorial changes, 11/88)	(editorial change, 6/04)
March 15, 1989	June 12, 2005
(editorial changes, 4/89)	June 18, 2006
December 14, 1989	April 25, 2008
June 6, 1990	(editorial change, 7/12)
(editorial changes, 3/91)	(change to amounts in III.B.2, 1/17)
March 15, 1991	June 5, 2019
December 5, 1991	(editorial change of COF's name (6/20)
September 17, 1992	June 2, 2024
(editorial changes, 10/92)	
March 11, 1993	
March 17, 1994	
June 9, 1994	
September 11, 1994	
November 10, 1994	
June 14, 1995	
September 17, 1995	
November 16, 1995	
March 15, 1996	
(June 12, 1996)	
September 20, 1996	
March 14, 1997	
June 11, 1997	
September 19, 1997	
March 13, 1998	
(responsibility reassigned, 11/98)	
(editorial change, 3/99)	
July 1, 1999 (revised at March 12, 1999 Meeting)	
April 14, 2021	