



# SHEET METAL AND AIR CONDITIONING CONTRACTORS' NATIONAL ASSOCIATION, INC.

P.O. Box 221230 CHANTILLY, VIRGINIA 20153-1230 TELEPHONE: (703) 803-2980 FAX: (703) 803-3732

## EXPENSE REIMBURSEMENT STATEMENT

SMACNA will reimburse Directors, Committee Members and appointed representatives for expenses incurred when on official Association business.

### ***THE REIMBURSEMENT POLICY IS ATTACHED.***

**Attention – Please submit your reimbursement request with accompanying receipts promptly. SMACNA'S Board of Directors have adopted a policy not to honor reimbursement requests submitted more than six (6) months from date the expenses were incurred.**

### PARTICIPANT INFORMATION

PURPOSE FOR REIMBURSEMENT SPECIFY: (Name of Committee-Board of Directors) etc.

\_\_\_\_\_

Name of Meeting Place \_\_\_\_\_ Date \_\_\_\_\_

\_\_\_\_\_ (city and state)

PRINTED NAME \_\_\_\_\_

COMPANY NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY, STATE & ZIP \_\_\_\_\_

YOUR SIGNATURE \_\_\_\_\_

### SMACNA NATIONAL OFFICE USE

ACCOUNT NUMBER

\_\_\_\_\_

STATEMENT & RECEIPTS APPROVED

\_\_\_\_\_ SIGNATURE – DEPARTMENT HEAD

Airfare \$ \_\_\_\_\_

Ground Transportation \$ \_\_\_\_\_

Airport Parking \$ \_\_\_\_\_

Hotel Expenses: \$ \_\_\_\_\_  
(enter total amount)

Deduct Personal Expenses \$ \_\_\_\_\_

Total Hotel Expenses (less personal expenses) to be paid by SMACNA: \$ \_\_\_\_\_

Total Meal Expenses (include those not charged to hotel bill) \$ \_\_\_\_\_

Mileage (Personal Auto) 58.5¢/per mile \$ \_\_\_\_\_

Gratuities/Tips \$ \_\_\_\_\_

Other Expenses (Explain) \$ \_\_\_\_\_

TOTAL OF ALL EXPENSES TO BE REIMBURSED BY SMACNA \$ \_\_\_\_\_

**See reimbursement policy for explanation of permissible expenses on reverse side.**

**Please remember that expense reimbursements are paid out of dues received from SMACNA members; therefore, all expenditures submitted for reimbursements should be reasonable and necessary.**

## REIMBURSEMENT POLICY

### **A. GENERAL**

SMACNA reimburses committee members for expenses (airfare, hotel, meals) incurred while attending SMACNA Committee meetings. Expenses incurred by spouses of committee members who may accompany them to SMACNA Committee meetings are not reimbursable and are considered personal expenses.

### **B. REQUEST FOR EXPENSE REIMBURSEMENT**

Request for reimbursement should be submitted to the national office within thirty (30) days of when the expense is incurred. Expense reimbursements for Committee meetings will be for a set number of days which is stated in the meeting call. Expenses incurred before or after dates listed in the meeting call are not reimbursable.

### **C. EXPENSE REIMBURSEMENTS**

The following are guidelines for what items constitute reimbursable expenses:

- 1) **Airfare** – Discounted coach required. Full fare coach or greater requires advance approval of the SMACNA CEO. Upgrade to “Economy Plus” or similar permitted if flight leg is greater than two (2) hours. Fees for up to two (2) bags are reimbursable.
- 2) **Ground Transportation** – Reimbursable expenses are roundtrip charges from home to airport and airport to hotel. Limousines may be used provided the charge does not exceed that of a taxi. Use of rental cars requires pre-approval by the SMACNA CEO.
- 3) **Airport Parking** – Airport parking fees incurred to attend a SMACNA Committee meeting are a reimbursable expense.
- 4) **Lodging** – Reservations will be made through SMACNA.
- 5) **Meals** – Most SMACNA meetings involve planned meals organized and provided by SMACNA. SMACNA staff liaisons to the group usually approve and/or pay bills associated with group meal or meals with individual volunteers. Their judgment should be deferred to as to what is an appropriate expense to charge to SMACNA. In the event wine is purchased for the group dinners, \$75 per bottle is the maximum amount reimbursable. Generally, when traveling alone or without SMACNA staff, total daily (3 meals) expenditures for food and all beverages (including alcohol) should not exceed \$150.00. If you are requesting reimbursement for meal expenses which include the cost for others, you must provide their names on the back of the receipts provided.
- 6) **Private Auto** – Compensation for use of a personal automobile will be at the current IRS approved rate. On travel where the total roundtrip mileage exceeds 300 miles, reimbursement for use of a personal auto plus parking costs will not exceed the lowest available coach airfare.
- 7) **Gratuities/Tips** – Gratuities/Tips are to include those for porters and bellboys. Gratuities/Tips for meals should be shown under meal expenses. Likewise, gratuities/tips for cabs should be included under taxi and limo.
- 8) **Other Expenses** – The following is a list of other types of expenses that do not fall into the abovementioned categories.
  - Laundry:** When on travel for a period of more than four (4) days, reasonable valet charges are reimbursable.
  - Recreational Activities:** Charges for items such as massages, tennis lessons, golf lessons, green fees, court fees, or other expenses for one’s own recreation are not reimbursable.

### **D. RECEIPTS**

SMACNA’s auditors require that itemized documentation be submitted for all items in excess of \$25.00 for which reimbursement is being requested. When requesting reimbursement for airfare, please provide documentation showing itinerary & amount paid for airline travel (i.e., travel agency receipt showing airfare(s) paid, etc.). Your credit card receipt/statement is not sufficient documentation.

For hotel expenses, please attach your itemized bill to your expense reimbursement statement. A copy of your credit card receipt/statement is not sufficient documentation.