

**GENERAL BOARD OF PENSION  
AND HEALTH BENEFITS  
OF THE  
UNITED METHODIST CHURCH**

Policy on Plan Sponsor Guest Travel Expense for General Board-sponsored meetings/events

Examples

- Conference Forum
- HealthFlex Summit
- Plan Sponsor Benefits Event
- General Agency Benefits Event
- Quadrennial Benefits Event
- District Superintendent Benefits Event
- Conference Benefit Funding Strategy Meetings
- Other plan sponsor meetings / events

**Effective 1-1-2005**

**Policy**

As an agency of the Church, the General Board of Pension and Health Benefits (General Board) has both a fiduciary and stewardship responsibility to operate efficiently, cost-effectively and prudently. A travel management program, including sound accounting controls, is essential in meeting these responsibilities. To that end, the following travel policy is in effect.

When guests are traveling at the General Board's expense, the General Board will arrange guest travel. Travel includes air, ground transportation and hotel accommodations as well as group meals during the meeting/event.

1. Air Transportation

The General Board's travel coordinator will work to obtain the best and lowest fare available when arranging air travel. If a change in air transportation is requested after a ticket has been purchased, and if there is an additional fee, the plan sponsor / guest traveler is expected to reimburse the General Board for the additional expense. This helps the General Board maintain good stewardship on behalf of the denomination.

2. Ground Transportation

The General Board's meeting planner will make accommodations for ground transportation on behalf of the guest traveler.

3. Arrival / Departure Times

Since the General Board is providing the transportation to the meeting/event, we will work to arrange travel so the guest can attend the entire meeting as scheduled. *If the guest needs to arrive late or leave early, the General Board will consider the circumstances and may request reimbursement for a percentage of the transportation costs.*

#### 4. Accommodations

The General Board's meeting planner will arrange hotel/motel accommodations on behalf of the guest traveler.

#### 5. Reimbursement

If the number of guests from a plan sponsor exceeds the communicated number of guests paid for by the General Board, the plan sponsor is expected to reimburse the General Board for the additional expenses or to provide a payment during the on-line registration process.

Reimbursement will be expected if the guest traveler arranges for air travel or ground transportation but does not use the arranged transportation.

If a guest traveler chooses to arrange his/her own air travel, the General Board will reimburse the traveler for the actual cost incurred. Such amount shall not exceed the amount that the General Board would have incurred had it arranged the travel.

#### 6. Check Out

Upon check-out, it is the responsibility of the guest traveler to pay the hotel/motel directly for any charges which are of a personal nature or otherwise not reimbursed by the General Board, i.e. movies, mini bar, additional amount for double room rates vs. single room rates, phone charges, etc.

#### 7. Meals

During the scheduled meeting/event, meals and snacks will be provided. Guests of the General Board are expected to be in attendance for all meals provided. The General Board will not reimburse the guest for meals/snacks that coincide with meals/snacks provided during the meeting/event.

On occasion, a stipend may be provided for guest meals. Guest travelers should choose low or moderately priced restaurants and meals. Cash register receipts are to be included with the Expense Reimbursement Form. The receipt/form should note the name(s) of those attending and the business purpose.

#### 8. Alcoholic Beverages

Alcoholic beverages are not authorized expenses for payment or reimbursement.

#### 9. Automobile Travel

A guest traveler may elect to use a personal vehicle to attend a General Board meeting/event. Compensation is at the IRS allowable mileage reimbursement rate as determined each year. This

reimbursement is intended to cover the cost of gasoline and vehicle usage. When the round trip exceeds 1,000 miles, transportation costs will be paid either on the total of in-route mileage or at the normal airfare available to the same destination, whichever is less. Documentation for the airfare is the responsibility of the guest traveler and must be submitted with the related Expense Reimbursement Form.

A guest traveler's own automobile insurance must be in effect when using a personal car for attending General Board meetings/events.

#### 10. Non-Reimbursable Expenses

- a. Personal entertainment
- b. In-room movies
- c. Convenience bar (minibar)
- d. In-flight movies
- e. Traffic fines
- f. Mileage to and from home/work to airport
- g. Airport parking while guest is at meeting/event
- h. Hotel rooms / meals prior to or upon completion of meeting / event
- i. Computer connection / internet access fees

#### 11. Travel Expense Reimbursement Form

The guest traveler shall provide a complete accounting of all *travel related expenses* to the meeting and event planner on an authorized Expense Reimbursement Form *within 1 month* of the trip's completion. All the expenses for one trip should be submitted on one Expense Reimbursement Form. Receipts for *all* expenditures in excess of \$25.00 *must* be included.

#### 12. Billing Response Time

When the General Board bills a guest traveler for reimbursement expenses, the guest traveler must remit payment and/or respond to inquiries within 30 working days after receipt of the bill. The General Board will also reimburse the guest traveler for expenses incurred at the meeting / event within 30 working days after receipt of the Expense Reimbursement Form and receipts.

#### 13. Documentation

<u>Expense Item</u>	<u>Acceptable Documentation</u>
Airline	Original passenger coupon and itinerary or copy of e-mail confirmation showing flight and price information
Hotel	Original folio and charge slip/proof of payment Charge slip alone is not sufficient
Car Rental	Original rental agreement and charge slip
Meals	Card member charge copy or cash register receipt for non-charged items

Other                      Card member charge copy or cash register receipt  
for non-charged items

14. Exceptions

The Manager of Continuing Education and Events Planning must approve exceptions to this policy, with appropriate rationale provided by the guest traveler, before travel arrangements are finalized.

January 11, 2005