



SEIU Local 1021 Member General Expense Reimbursement Policy and Procedure

Authorized members who incur expenses in the course of carrying out their union duties on behalf of the local can be reimbursed based on the guidelines below. Prior approval is required for reimbursement of union business-related expenditures.

General expenses: The chief elected officer, president, treasurer, directors, industry chairs, and committee chairs have the authority to approve the reimbursement of members' expenses for union business-related expenses. The chief elected officer, president, director, industry chair, or committee chair must authorize the expenditures with written and dated documentation prior to the member incurring the expense. This clause does not supersede the policies and guidelines governing and/or restricting other specified types of expenditures for which the local reimburses members. Industry and committee chairs may only authorize and approve industry or committee funds.

Mileage: Members who have been authorized—in advance—by the chief elected officer, president, director, industry chair, or committee chair shall be reimbursed mileage when they are doing union business, e.g., bargaining, representation, approved events. Mileage will be reimbursed at the prevailing IRS business mileage rate. Members will be reimbursed for all miles driven over 25 round-trip miles. To be reimbursed, members must submit documentation of attendance at the event, meeting, etc. (e.g., an agenda or program) and Map Quest or other driving directions that indicate the departure address, destination, address, and the number of miles driven.

Parking: Members who have been authorized by the chief elected officer, president, director, industry chair, or committee chair shall be reimbursed parking for attending specified events, meetings, etc. To be reimbursed, members must submit documentation of attendance at the event, meeting, etc. (e.g., an agenda or program) and a receipt for the cost of parking. The local will reimburse at the economy parking rate of the facility used (airport, hotel, public parking, etc.). Local 1021 will not reimburse any member for parking tickets.

Receipts and documentation: In order for an individual to be reimbursed by the local, the following documentation and receipts must be submitted.

- Documentation must be submitted on the local's official reimbursement form with all receipts and other necessary documentation attached.
- Original receipts, not copies or credit card receipts, are required for reimbursement. Copies of cancelled checks are not considered receipts. A bill, in itself, is not a receipt. Bills must be stamped "paid" by the vendor.
- Adequate documentation must include:
 - date the expense was incurred;

- the nature of the expense (e.g., parking);
- a sufficiently detailed description of the business purpose of the expense (e.g., travel to a meeting, items for a local event);
- where the expense was incurred (e.g., name and location of the restaurant, union office, hotel, etc.);
- the name and title of every person on whose behalf an expense was incurred (e.g., everyone whose meal was paid for).

The chief elected officer, president, director, industry chair, or committee chair authorizing reimbursement shall carefully review documentation for accuracy before approving reimbursement.

Exceptions: The president or designee may grant an exception to any of the restrictions within this policy when s/he determines that circumstances warrant an exception. Such exceptions are subject to review by the executive board. Anyone who requests an exception should be aware that the exception may be under IRS and/or DOL rules and result in taxable income that you must report to the IRS and/or DOL. In such cases, your W-2 form at the end of the year will reflect the additional income and the local will report the cost of the expense as “other disbursements” on the local’s LM-2 report. Exceptions involving the president must be approved by the executive board.

Reimbursement requests and supporting documentation must be submitted within six (6) months of the expense being incurred. Reimbursement requests submitted with proper documentation and authorization will be processed within two (2) weeks of receipt by the finance department.

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