



District 72 – New Zealand

Travel Reimbursement Policy for 2020-21

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To: District Officers
Subject: Travel Reimbursement Policy for 2020-21

BACKGROUND

District 72 recognises that service as a District Officer incurs additional, sometimes significant, out-of-pocket expenses. As a not for profit organization, we are obliged to ensure the wise use of the funds we have available to us as well as limiting the barrier to service that an individual's personal financial circumstances may present. This document has been prepared to outline the District's approach to trying to be both fair and equitable to those who serve and the financial constraints under which the District operates.

Travel is our single largest budget item, as it is for many Districts. Toastmasters International imposes a limit on the proportion that we may spend on travel compared to the other activities we engage in, in pursuit of the District's goals. As a consequence, we must manage our expenses in this area very carefully.

The travel reimbursement policy covers the following District training events:

- District Officer Training in Christchurch and Wellington, 18-19 July 2020
- District Officer Training in Christchurch, 26-27 September 2020
- Planning and Review Meeting in Christchurch, 28 November 2020
- District Officer Training in TBC, 20-21 February 2021
- District Officer Training in Upper Hutt/Wellington, 14 May 2021 at the 2021 District Conference
- Training for the 2021-22 Area and Division Directors in June/July 2021.

The mileage policy will also apply to the travel for two mandatory Area Director club visits.

Note: you must have filed your Area Director club visit report online before you may submit a claim.

AIR TRAVEL

Full reimbursement will be paid for:

- Air New Zealand 'Seat Only' option
- Air New Zealand 'Seat Plus Bag' option
- Jetstar Starter plus up to 20kg of checked luggage.

Note: District also reimburse the fee for payment by credit card and for airline trip insurance.

Please note that the District will NOT reimburse the following:

- flights paid for with Airpoints
- travel agent fees and commissions
- fees for specific seat selection

- fees to offset carbon emissions.

Claims must be accompanied by the tax invoice/receipt for the airfare and by the actual ticket showing the point of departure and destination as well as the date of travel. Evidence of payment for insurance is also required.

The dates for the above events are now finalised and District Officers are expected to book in time to get good deals. Expense claims will be reimbursed once the expenditure is incurred; you don't have to wait for the event. There is a requirement that, if you make a claim and then don't attend, you will reimburse the District.

MILEAGE

Mileage to any of the above events will be reimbursed as follows:

- The lower of the actual mileage claim and the costs of an airfare (as detailed above). That is, if you choose to drive when you could fly more cheaply, District will reimburse your mileage up to the cost of an Air New Zealand 'Seat Plus Bag' option or Jetstar Starter Fair plus 20kg of checked luggage. Please supply a screenshot of the airfares from between 1.5 and 3 months prior to travel as proof.
- Mileage will be reimbursed at a rate of 40 cents per kilometre. District Officers must travel at least a 40km round trip before becoming eligible for reimbursement. The first 40 kilometres are not reimbursable.
- Claims under \$5 are not reimbursable.
- Mileage claims must be supported by attaching a copy of the mileage from either Google Maps, Wises or AA Travel.
- If more than one District Officer is travelling to a training event in the same car, only one claim will be accepted for reimbursement.

EXAMPLES

1. *Mary travels 50km in total to visit a club and complete one of her mandatory Area Director visits. The first 40km are not claimable and the next 10km is multiplied by 40c/km to give a total of \$4. Mary is not able to lodge a claim form because the total claimable amount is under \$5.*
2. *Matthew travels 30km in total to visit a club and complete one of his mandatory Area Director visits. The first 40km are not claimable, so Matthew is not able to lodge a claim.*
3. *Carol travels 75km in total to visit a club and complete one of her mandatory Area Director visits. The first 40km are not claimable and the next 35km are multiplied by 40c/km to give a total of \$14. Carol submits her club visit report online, completes the claim form and prints out a Google map of the trip to support her claim.*
4. *Owen books an Air New Zealand Seat Plug Bag flight for \$156 to attend District Officer Training and is reimbursed for the full amount.*
5. *Anthony attends the same District Officer Training as Owen but elects to drive. The distance is such that his mileage expense claim comes to \$180. Anthony will only be reimbursed to the value of the Air New Zealand Seat Plus Bag flight, i.e. \$156.*

OTHER TRANSPORT COSTS

Buses, Trains and Taxis

- For travel to District Officer Training (other than by air), District will reimburse **the lower of** bus, train or taxi fares, or mileage. This also applies to travel to and from the airport to the training location. You will need to apply the mileage policy as detailed above. First, calculate the mileage, deducting the first 40km, then compare to your bus or taxi fare.
- For those who have no alternative other than to incur a taxi fare from the airport to District Officer Training, reimbursement of the fare will be on a case by case basis. We suggest you group together and use a shuttle service because it is more cost efficient. Please contact us before making your travel arrangements.
- Bus fares incurred for travel to complete the two mandatory club visits by Area Directors will be reimbursed provided all other policy requirements are met, i.e. distance and minimum claim.

- Mileage incurred for travel outside of mandatory club visits or District Officer Training will be at the discretion of the District Director. Please contact us before incurring the expense.

Parking

- While attending District Training events, parking costs incurred by the District Officer at the airport at their point of departure will be reimbursed up to a maximum of \$40.
- Parking costs incurred other than in the point above, e.g. while performing the two mandatory club visits by Area Directors, will not be reimbursed.
- Parking while attending Area or Division contests or Club Officer Training (Club Leadership Training) will not be reimbursed.

Ferry

- If you intend to travel by ferry to conduct a mandatory club visit please discuss with the District Director.

TRAVEL TO THE UPPER HUTT CONFERENCE

- For those who fly directly to Wellington, the policies regarding claiming for flights are the same as listed above.
- Transport from Wellington airport to the conference venue follows the rules for buses and taxis as detailed above.
- Please note that District does not reimburse car rental – only mileage. Mileage will be capped for the Upper Hutt conference at a maximum reimbursement of \$499. If your journey is complex, please discuss this with Rob and Philip to review options and reimbursement before booking your travel.

IMPORTANT POINTS TO NOTE

- Journeys costing more than \$500 must be **pre-approved** by the District Director. If you do not receive pre-approval, you run the risk that District will not reimburse the full amount.
- All claims must be supported by a correctly completed expense claim form and supporting documentation as detailed above.
- **Claims must be made within 60 days of the event or they will not be reimbursed.**
- We note that some District Officers have more complicated journeys. Please contact either the District Finance Manager or the District Director with our proposed travel arrangements and we will let you know what the terms of reimbursement will be. The **must** be done **before** you incur the expenditure.
- Other travel costs, such as expenses incurred by club coaches, extra visits by Area Directors to struggling clubs, and Area Director/Division Director travel to Area/Division conferences **must** be pre-approved by the District Director.
- Reimbursement of significant journeys by contestants to attend Area and Division contests/conferences (for example, travel by the Area E1 contestant to Christchurch) **must** be pre-approved by the District Director prior to booking the travel.

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