



SURF Travel and Meeting Expense Reimbursement Policy and Implementation Guidelines

The Sustainable Remediation Forum (SURF) By-Laws permit reimbursement of individual domestic and international travel and meeting expenses (travel expenses) when the activity advances SURF's mission of education and research.

Policy

The following is the SURF Board's policy for reimbursement of domestic and foreign travel and meeting expenses (travel expenses).

- Travel must be consistent with SURF's budget, objectives, and mission.
- Funds for support of individual travel and meeting expenses are limited. The SURF Board considers sponsorship of these expenses an extraordinary occurrence that must clearly advance SURF's mission and, to a lesser extent, the member's needs.
- Requests for reimbursement of individual travel expenses must be approved in advance by the SURF Board of Trustees (Board) and documented in the Board's meeting records.
- Reports of actual expenses must be reviewed and approved by the Board (or their delegates) prior to disbursement to ensure the expenses are consistent with the request.
- If requested, the Board may approve a travel stipend that approximates expected out of pocket expenses in lieu of reimbursing travel expenses. When a stipend is awarded, submittal of itemized expenses is not required.
- While a priority will be given to requests by SURF members, the Board may reimburse the expenses of either a member or non-member.
- SURF will only reimburse out of pocket expenses; SURF will not provide reimbursement for the traveler's time.
- The Board will not reimburse travelers for gifts, including payment of another's meal or travel expenses. However, the Board may, in unique circumstances, approve such expenses when they benefit SURF's mission.

Any exceptions to this policy must be approved by the Board and documented in the Board's meeting records.

Implementation Guidelines

The Board expects individuals to spend SURF funds wisely, as they would their own or their employer's funds. Implementation of the travel expense policy relies on the following expectations.

The SURF Board expects the following from travelers:

- Reliance on the traveler's responsibility, accountability, ethics and integrity.
- Use of other funds whenever possible. Where more appropriate, SURF may purchase or pay for the expenses directly.




- Exercise of good judgment in making travel arrangements, including early booking of travel arrangements.
- Submittal of a request for reimbursement of travel expenses at least 90 days in advance of the proposed travel to the SURF Secretary at (secretary@sustainableremediation.org) using the attached form (or as modified). The traveler must:
 - Describe the trip purpose and justification for SURF support.
 - Estimate anticipated expenses, including hotel, airfare, rental car, meal expense with documentation, when possible.
 - Include justification for a travel advance or stipend, if needed.
 - Describe, in detail, any expenses that might be considered gifts to (or payment on behalf of) another, such as another's meal or travel costs.
- Submittal of itemized expenses electronically to the SURF Treasurer (treasurer@sustainableremediation.org) within 30 days of travel completion in a format that documents expenses daily. The traveler must:
 - Use an expense report form provided by SURF or another with equivalent detail.
 - Document all expenses over \$25US with proof of service and payment.
 - Compare approved expenses with the actual expenses submitted, including an explanation of significant discrepancies.

In return, travelers can expect the following from the SURF Board:

- Approval or disapproval of the proposed travel request within 30 days. If the Board (or its delegates) request supplemental information, the Board will make every attempt to act on the request no later than 45 days in advance of the proposed travel.
- Reimbursement of approved expenses within 15 days of receipt by the SURF Treasurer. The SURF Board (or its delegate(s) - no fewer than two) will review the submitted expenses to ensure they are consistent with the approved request. If questions arise, the Board will make every attempt to act on the supplemental data within 7 days of receipt.

These guidelines will be modified, as needed, through experience.

Approved: 
Name: Paul Brandt Butler
Title: Treasurer
Date: May 14, 2012



**Request for Reimbursement
Domestic or International Travel and Meeting Expenses**

Traveler

Name	
Affiliation	
Address	
Phone	
Email	
SURF Member (Y/N)	

Event

Describe: Purpose of Attendance, Justification of SURF support, and support of SURF's Mission		
Sponsoring Organization		
Dates of travel (Start/End)		
Travel Itinerary (From/To)		

Reimbursable Expenses

Comment

Total cost of registration fee		
Total cost of transportation		
Total cost of lodging		
Total cost of meals:		
Total other misc. cost, including gifts		
Total estimated out-of-pocket costs		

Costs Reimbursed by Others? Whom?	
Travel Advance or Stipend Requested (Y/N), Justification	
Should SURF pay for some, or all, of these expenses directly? If yes, justify.	

Affidavit

I certify that the proposed expenses are for expenses in accord with SURF's mission of education and research.	Signature:
Date:	Name:

Board Approval

Name:	
Date:	