Irvine Teachers Association

4940 Irvine Blvd, Suite 205 Irvine, CA 92620-7916

MEMBER EXPENSE STATEMENT

Date of Conference/Meeting

Name of Attendee

Name of Conference/Meeting

Attendee's School Site

Attendee Personal Email (not TUSD)

Attendee's Contact Phone

Date									Line Total
Day of week									
Breakfast									-
Lunch									-
Dinner									-
Lodging									-
Housekeeping & Portage									-
Shuttle									-
Airfare									-
Parking									-
Other									-
# of Miles									
Mileage ($)	-	-	-	-	-	-	-	-	-
Per Diem Total	-	-	-	-	-	-	-	-	-

Subtotal	-
Reg Fee	
Total Due	-

Attach Receipts

Member Signature

Date

ITA President's Approval

Date

FOR ACCOUNTING OFFICE USE ONLY

Account number:	Amount:	Check No.
Notes:		

Reimbursement Policy on REVERSE SIDE

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MEMBERSHIP EXPENSE REIMBURSEMENT POLICY

Standing Rule 1: Membership Expense Reimbursement Policy

1. The rules governing the control for necessary expenses for members on Association business as authorized by the Board of Directors are as follows:

   a. TRAVEL (Requires advanced approval from the Executive Board):
      (1) Plane: Actual, most economical coach fare (attach receipt)
      (2) Train or Bus or Taxi: Actual Fare (attach receipt)
      (3) Auto:
         (a) Standard IRS Business Mileage Rate (0.70 cents, effective January 1, 2025).
         (b) Mileage reimbursement will be calculated using the shortest highway route.
         (c) Mileage reimbursement cannot exceed the cost of coach plane fare.
         (d) Toll roads and bridges reimbursed at actual cost.
      (4) Airport Shuttle: ITA will reimburse the cost of airport shuttles to and from the meeting site (if one is not provided by the conference location). Taxi fare shall be reimbursed only when no other form of transportation is available or less expensive.

      (5) Parking: Actual costs of airport parking and hotel parking excluding valet parking

   b. LODGING (Attach statement):
      (1) ITA/CTA/NEA Conferences - Half the cost of double-occupancy hotel room. Those wishing a single room must pay the difference except for extenuating circumstances (physically challenged or other medical reasons) which must be approved in advance
      (2) Other Travel or Conferences - Cost of a standard hotel room
      (3) If travel by auto results in an extra night hotel room, such charge is not reimbursable
      (4) Personal charges such as laundry, person telephone calls, snacks, pay-per-view movies, and entertainment are not reimbursable.
      (5) A maximum of eight dollars ($8.00) total per day for portage and a housekeeping tip is reimbursable

   c. MEALS (attach <u>itemized receipts</u>):
      (1) Reimbursements are not allowed when a meal is provided by the local, UniServ, Service Center Council, CTA or NEA.
      (2) Actual amounts paid including tax and tip not to exceed $90.00 for any one day.
      (3) Meals are defined as breakfast, lunch & dinner (includes beverage, dessert, tax & tip).
      (4) Maximum tip reimbursable percentage is 18%.
      (5) Extra meals required by auto travel are not reimbursable.

   d. OTHER REIMBURSEMENTS (require advance approval from Executive Board):
      (1) Cell phone calls reimbursement for business use while traveling
      (2) Hotel Internet Connection to contact bargaining unit members

   e. DEADLINE FOR FILING EXPENSE REIMBURSEMENTS:
      All expense reimbursements must be filed within thirty (30) days of the end of the month in which the expenses were incurred. An additional thirty (30) day period may be granted by the Executive Board for extenuating circumstances set forth in an attached letter to the expense reimbursement

   f. RECURRING SUBMISSION OF LATE EXPENSES:
      Members will be granted up to three late reimbursements per fiscal year

   g. APPEALS/DISPUTES/EXCEPTIONS:
      Members may on a timely basis appeal any dispute or exception of an expense reimbursement to the Executive Board. The Executive Board will make their determination on the appeal at its next regularly scheduled Board meeting.

   h. Conference Allotment:
      Each conference shall have an allocated dollar amount approved by the Executive Board using the criterion listed above.

   i. ITA members may retain any rewards or points earned while traveling for ITA/CTA events or

conferences.