

The Connectional Table Policy for Reimbursement of Travel Expenses

Official travel of the staff and members of the Connectional Table shall be interpreted to include all travel that is necessary in the performance of official duties directly related to the Connectional Table functions. These expenses will be reimbursed for staff and members as follows.

1. Chairperson: Travel expenses to Connectional Table regular and advisory team meetings only incurred by the chair of the Connectional Table shall be reimbursed by the Episcopal Fund, assuming that chairperson is a bishop. Other travel expenses related to the work of the Connectional Table shall be reimbursed by funds from the Connectional Table.
2. Jurisdictional/Central Conference Representatives: Travel expenses to Connectional Table meetings incurred by the 28 persons elected through jurisdictional and central conferences shall be reimbursed from funds of the Connectional Table.
3. Board/Agency Representatives: Travel expenses to Connectional Table Meetings incurred by the presidents and general secretaries of the boards and agencies (including bishops), General Board of Church and Society, Discipleship Ministries, General Board of Global Ministries, General Board of Higher Education and Ministry, General Commission on Religion and Race, General Commission on Status and Role of Women, General Commission on United Methodist Men, General Commission on Communications, and General Commission on Archives and History, and the General Council on Finance and Administration, shall be reimbursed by their respective agencies.
4. Young People: Travel expenses to Connectional Table Meetings incurred by one youth and one young adult from the Division on Ministries with Young People shall be reimbursed from funds of the Connectional Table. One parent may also join the youth representative at the expense of the Connectional Table.
5. Racial-Ethnic Caucuses: Travel expenses to Connectional Table Meetings incurred by members from each of the racial ethnic caucuses (including bishops) as elected by the Connectional Table upon nomination from: Black Methodists for Church Renewal, Methodists Associated to Represent Hispanic Americans, Native American International Caucus, National Federation of Asian American United Methodists, and Pacific Islanders National Caucus United Methodist shall be reimbursed from funds of the Connectional Table.
6. Ecumenical Officer: Travel expenses to Connectional Table Meetings incurred by the Ecumenical Officer shall be reimbursed by the Episcopal Fund.

Revised January 3, 2023

The Connectional Table

VOLUNTEER TRAVEL EXPENSE REPORT Office (773)

714-1517

Email: ConnectionalTable@umc.org

EXPENSE FORMS SHOULD BE SUBMITTED WITHIN 30 DAYS OF COMPLETION OF TRIP.

Name: _____

APPROVAL (for office use only)

Address: _____

BY: _____

DATE: _____

Date Submitted: _____

Signature: _____

Date of Travel: _____

Location of Meeting/Event: _____

Purpose: _____

Cash Expenses (only items paid personally)

Transportation (air, rail, bus)	\$	
Auto (mi @ .655¢, max 1000 mi) = \$ Tolls \$ Parking \$	\$	
Taxi & Limo (provide receipts and ground transportation itinerary)	\$	
	\$	
	\$	\$
Lodging (provide receipts)	\$	
Cash meals-self (provide receipts)	\$	
Telephone, Postage	\$	
Tips + + + 	\$	
Misc. (specify).....	\$	

***TOTAL: A/C #** _____ \$ _____

VENDOR _____

CONTROLLER _____

ACCOUNTING _____

***Split expense: (agree to total)**

A/C#	Amt.	\$
A/C#	Amt.	\$
A/C#	Amt.	\$
		\$

Please send to Frances Roberts:

The Connectional Table

VOLUNTEER TRAVEL EXPENSE REPORT Office (773)

714-1517

Email: ConnectionalTable@umc.org

PHONE EMAIL MAIL

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Chicago, IL 60601

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HOW TO FILL OUT A TRAVEL EXPENSE REPORT FORM AND ENSURE SPEEDY REIMBURSEMENT

General Statement

Business travel shall be taken at the lowest possible cost to the Church, and when possible, travel schedules are to be adjusted to achieve this goal.

Please print your name and address legibly so we can be assured the check is sent to the proper address. All expense reports must be signed before being sent in for reimbursement. The date, purpose and place of a meeting or meetings should be listed on the report form. **Make sure you have completed all of the following BEFORE** submitting your expense report. Failure to do so will delay your reimbursement.

Cash Expenses

- A. **Transportation** – If transportation has *not* been previously paid either through group billing or an air travel account, please enter the amount of air, rail or bus transportation cost.
- B. **Auto** – If not driving to the meeting, on this line you will include the mileage to and from the airport, any tolls to and from the airport, and any parking at the airport or transportation during the meeting. If you choose to drive and the round-trip mileage exceeds 1,000 miles, the cost will be paid either on the actual mileage plus meals and lodging en route and parking fees, or the most economical air fare available plus airport-related ground transportation cost, whichever is the lesser amount.
- C. **Taxi, Uber, Lyft** – Include any taxi or ride share amounts from home or/and at the destination. Taxi/ride share fares while on Connectional Table business would also be included on this line. Remember to get a receipt for your taxi or ride share fare.
- D. **Lodging** – Include any hotels en route and if the meeting site hotel is not group billed, that cost should be included on this line.
- E. **Meals** – Include meals en route and on location, if a meal has not been provided. Meals for guests may **not** be included. Receipts are expected to be provided for all meal expenditures. In rare instances, such as when meals are purchased at vending machines or at locations which cannot or will not provide receipts, a contemporaneous log may be provided for claiming expenditures up to \$25.00 per transaction.
- F. **Telephone/Postage** – Include any telephone or mailing cost for Connectional Table business on this line.
- G. **Tips** – Self-explanatory.
- H. **Miscellaneous** – Specify any miscellaneous expenses to be reimbursed for Connectional Table business.

Documentation Requirements

1. Passenger Coupon for transportation, even if The Connectional Table has already paid for the ticket.
2. Copy of hotel bill, even if billed direct to The Connectional Table.
3. Documentation for meals and names of other persons included in amounts, if authorized.
4. Copy of car rental invoice if being reimbursed.
5. Copy of all credit card receipts for charges related to travel.
6. Receipts for parking, tolls, taxi etc.
7. Receipts for miscellaneous items including phone calls, faxes, postage, etc.

NOTE: Any single item must be supported by a receipt, except for those transactions for which receipts are not provided such as tips. Documentation should be presented in an orderly fashion, preferably with itemized receipts affixed to sheets of 8-1/2" x 11" paper. Marginal explanations and cross references should be included when necessary.

The maximum allowable auto mileage deduction rate established by the Internal Revenue Service for business miles shall be the maximum that General Agencies establish for reimbursement. Changes in reimbursement rates shall be implemented on January 1 or as soon thereafter as practicable following an IRS announcement of changes in the allowable deduction rate.

Alcoholic beverages are not to be submitted for reimbursement.

CONNECTIONAL TABLE BUSINESS MEAL LOG

Trip Location and Dates

Name

Departure/Return

Day of the Week	Mon	Tues	Weds	Thurs	Friday	Sat	Sun	Grand Total
Date								

Breakfast								\$0.00
Lunch								\$0.00
Dinner								\$0.00
Other								\$0.00
Total Costs (Cash or Credit)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Less Total Meals Paid on CT Credit Card	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total Meals Paid by Cash	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Daily Meal Allowance								

This total must correspond with the amount reported on the Travel Expense Report Meal line.

Note: All meals which are group meals, meals paid by others, or meals occurring before or after the trip begins or ends should be indicated by placing an "XX" in the appropriate boxes.

The Daily Meal Allowance (DMA) will then be reduced by the applicable meal percentage. (Breakfast 20%, lunch 25%, dinner 55% rounded to the next highest full dollar amount).

The maximum DMA will be calculated according to the following schedule:

Trip begins when you leave your house/office

Trip ends when you arrive back at your house/office

DMA is calculated as follows:

If travel begins before 10 a.m., the full DMA applies

If travel begins after 10 a.m., 80% of the DMA applies

If travel begins after 4 p.m., 55% of the DMA applies

If travel begins after 8 p.m., there is no DMA for that day

If travel ends before 10 a.m., 20% of the DMA applies

If travel ends before 4 p.m., 45% of the DMA applies

If travel ends after 4 p.m., the full DMA applies

Any special circumstances must be fully explained below: