SWE–Region H Leadership & Region H Council Representative Regional Travel Grant Policy

# Purpose

Provide financial assistance for the Region H leadership and Region H council representative to attend the SWE Region H HART (Heartland Annual Roundtable) Meeting, SWE Annual Conference, SWE Region H Conference, or any in person region council or senate meeting.

“Region H leadership” is defined as Region H elected officer or senator. The region governor is not included in this policy. An alternate representative may only apply if she/he will be participating in the absence of the elected representative and has been designated by her/his section as an alternate. Region collegiate senator, region collegiate representatives (RCR), region collegiate communication editor (RCCE), and SWE future leaders (SWEFL) are not included in this policy; they have a separate policy. “Applicant” will be used throughout the document to signify qualifying “Region H leadership and Region H council representative.”

# Budget

* Budget will be set by the region council for each fiscal year.
* Budget dollars not used during the fiscal year will not be transferred to another fiscal year.
* Approved funds will be divided among qualifying events by the region officers.

# Basic Requirements

* The travel grant may cover up to 75% of the actual travel expense. If applicable, the SWE Section, the individual’s company, or other funding shall be used first.
* The traveling distance between the applicant’s home and the location of the event must be more than 100 miles one way.
* Flights will only be reimbursed if the one-way travel distance exceeds 240 miles or if the applicant demonstrates that this is the most cost effective means of transportation. Associated fees (including but not limited to baggage, parking and airport shuttle) may be considered.
* Mileage can be reimbursed at the IRS approved business rate.
* Rental cars plus gas expense are permitted as a reimbursable mode of transportation.
* The applicant is responsible for demonstrating that they have selected the most cost effective method of transport. If they have not, expenses will be capped at the expenses associated with the most cost effective method of transport.
* Lodging required during a meeting will be reimbursed at the rate of half of a double room or actual cost, whichever is less.
* Registration costs are not covered by this grant. For Region Conference, the allowable cost is the day rate subtracted from the double registration cost.
* Tour/recreational expenses will not be covered by this grant.

# Approval Procedure

* The treasurer will provide an application form.
* The due date for the application shall be at least one month prior to the start of the event.
* The treasurer will review each expense within the application and will make a recommendation to the region officers for approval or rejection of each expense based on the point values below. The elected region officers shall approve or reject each application. (*Note: The guidelines should not be treated as absolute rules. The purpose of the Travel Grants should be kept in mind when processing the applications.)*
* Point Values

|  |  |  |
| --- | --- | --- |
| Point Value | Section Need  (Net asset stated in the previous year’s financial report) – Section reps only | Distance from Event |
| 5 | Less than $1,000 | Over 550 miles |
| 4 | $1,000-$2,500 | 451-550 miles |
| 3 | $2,501-$5,000 | 351-450 miles |
| 2 | $5,001-$10,000 | 251-350 miles |
| 1 | Over $10,000 | 151-250 miles |

* Additional points
  + One point will also be awarded if the applicant is making a report to the region council.
  + Two points awarded if the applicant is a presenter at a conference session.
  + One point will be awarded if the applicant also serves on a region committee and two points if they are a region committee chair.
  + One point will be awarded if the applicant also serves on a Society or senate committee.
* The total amount approved may be less than the grant budget for the fiscal year.
* The treasurer will inform the applicant of the approval/rejection of each expense and the total amount of the grant no later than 10 days after the application deadline.
* All the applications for a given event will be processed at the same time.

# Guidelines for Approving Travel Grants

* The application must be received by the due date. No late applications will be processed. E-mail is the preferred method for submitting an application.
* All basic requirements described above must be met.
* The amount of money to be approved will be based on the availability of the funds and the number of applicants. If there is more than one applicant for the grant, the funds may not necessarily be equally divided among applicants.
* When there is more than one applicant for a grant for the same event, the following conditions will be considered:
* A greater consideration will be given to the applicant who has direct association with the event. For example, an applicant making a presentation will be given greater consideration.
* An applicant that has never received a grant previously will be given greater consideration over an applicant that has.
* The Governor may choose in any given year not to give a grant. Reasons for disapproval shall be provided to the applicant.
* These guidelines will be considered separately for Region H leadership and Region H council representative. There is a separate budget for Region H leadership and Region H council representatives.

# Guidelines for Reimbursement

* Grant conditions may include the following:
* A liability release form signed by the applicant prior to the event to release SWE from any liabilities that may result from travel
* Proof of registration or attendance
* Receipts related to travel
* Other requirements as determined necessary by the region treasurer or governor
* If the applicant is not able to use the travel grant by meeting all the conditions, then the money will be returned to the region.
* If the actual costs incurred are less than the amount of the grant approved for an individual, only the actual out of pocket expense shall be reimbursed, at 75% of actual cost.
* Required documents must be submitted within 30 days of the end of the event.
* Treasurer will issue reimbursement checks within 30 days of receipt of documentation.

# Revision History

* Monday, September 17, 2007– Revision A.
* August 18, 2008 – Updated to include travel to Region Meeting and dates for FY09.
* May 19, 2009 – Updated to include travel to Region Caucus and dates for FY10.
* August 1, 2010 – Updated to include COR and Leadership travel to SWE National Conference and dates for FY11.
* September 7, 2010- Transferred date specific information to Travel Grant Form.
* September 9, 2010- Revised SWE National Conference to SWE Annual Conference, Fall Caucus to Region H HART (Heartland Annual Roundtable) meeting, and COR to Region H Council Representative.
* January 17, 2012 – Added senate meetings, policy for mileage and rental car reimbursement, and reimbursement deadlines. Also revised verbiage to match current practice.
* June 18, 2015 – Deleted alternate senator, revised verbiage to match current practice.