

Greater Kansas City Metro Area Local # 67



Travel and Expense

Reimbursement Policy

**For
Designated Representatives
&
Authorized or Appointed Members**

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Introduction

It is the responsibility of each designated representative (advocate) and authorized or appointed members representing the Greater Kansas City Metro Area Local # 67, AFL-CIO (GKCMAL) to know and to comply with the GKCMAL *Travel and Expense Reimbursement policy*.

This expense reimbursement policy of the Greater Kansas City Metro Area Local # 67, AFL-CIO is an "Accountable Plan" and is implemented to reimburse GKCMAL designees and authorized or appointed members for the entire amount of their actual business expenses within the limits defined below. The GSA Per Diem Rates is deemed an "accountable" plan by the IRS. This system relieves GKCMAL designees and authorized or appointed members of the burden of reporting and justifying their travel expenses on their personal income tax returns. The system provides for a set flat dollar amounts to be reimbursed for hotel, meals and incidental expenses for each city/county. Reimbursement of expenses also falls under the jurisdiction of the Department of Labor (DOL). To comply with both the DOL and the IRS rules and regulations, the GKCMAL Expense Reimbursement Policy requires detailed receipts and complete documentation (who, what, when, where, and why) be submitted for reimbursable expenses.

Reimbursement of expenses other than the GSA Per Diem can be made only when original, unaltered receipts are provided. Photocopies of either the expense voucher or supporting documentation are not normally accepted by the DOL for reimbursement purposes.

Expense Filing and Approval

It is the policy of the Greater Kansas City Metro Area Local # 67 that *ALL assignments and trips must be authorized in advance*. Reimbursement of travel expenses will be paid only for approved assignments and trips. Reimbursement of expenses will be paid only upon completion of travel. A separate expense voucher must be submitted for each assignment. Expense vouchers should be submitted within *ten (10) days* of the expense being incurred.

GKCMAL assumes no obligation to reimburse advocates and authorized or appointed members for expenses that are not in compliance with these policies. Expenses that are not specifically covered by this policy require the individual to contact the Authorizing Officer before incurring the expense to ensure proper approval and reporting requirements are met.

Trustees under the supervision of the Secretary-Treasurer will audit expenses to ensure proper original documentation and approvals are attached. The Secretary-Treasurer will follow up directly with the authorized members if there are any issues regarding approval or documentation and/or if there are any audit exceptions.

GKCMAL reserves the right to require an advocate and authorized or appointed member to reimburse the Union immediately for errors in LWOP and expense reimbursement.

Ground Transportation

Additional transportation expenses, such as taxi charges and/or transportation to and from airports, will be reimbursed. However, these charges must be fully receipted. Receipts for taxis must include date, origin and destination, and will be reimbursed for business purposes only (e.g. Hotel to Airport, location of business meetings).

Lodging/Hotel

The cost of your hotel room will be paid by the GKCMAL whenever possible and in accordance with these policies. Union Business Telephone charges on your hotel bill are discouraged but allowed and are not considered as part of your per diem. Any unusual telephone charges must be authorized in advance by the President, Executive Vice President or Secretary Treasurer. GKCMAL will not reimburse for any hotel incidentals including pay TV.

Meals

Under the Labor-Management Reporting and Disclosure Act of 1959, as amended (LMRDA), meals are allowed for the benefit of the assigned officers and not for personal benefit. Your meals are included in your Per Diem set by the GSA for whatever city you are in. If you are required to travel out-of-town on assignment, you are allowed a set GSA Per Diem for meals and incidental expenses. *Incidental expenses do not include personal items.* Per Diem does not cover meal expenses incurred in the city of origin (hometown). Any assignment within a one-way local commuting distance of fifty (50) miles [or 100 miles round trip] is considered 'in town' by both the IRS and the GKCMAL. Meal expenses submitted on 'in town' assignments are not considered business expenses and cannot be reimbursed. Tips are part of your per diem. Tips for meals should not exceed twenty percent 20% of the pre-tax amount.

Per Diem

Your total per diem allowance is determined by the number of hotel nights plus one travel day. *For example, if an assignment requires an overnight stay in a hotel, you will be allowed one day's per diem plus per diem for one travel day. The GKCMAL will pay the IRS approved amounts for meals, lodging and IRS mileage (GSA Per Diem).*

Travel Arrangements

It is the policy of the Greater Kansas City Metro Area Local # 67 that *ALL assignments and trips must be authorized in advance.* The Secretary Treasurer/President will make all travel arrangements using the union credit card whenever possible. Reimbursement of travel expenses will be paid only for approved assignments and trips. Advocates

must send the original expense voucher to the GKCMAL Trustees. Keep a copy for your records. The Trustees will review the expenses for all advocates and will disallow any item that was not approved in advance.

Personal Car Usage

Designated Representatives and authorized or appointed members will be reimbursed for approved transportation expenses incurred when they use their personal vehicle as a result of an assignment. You are allowed the IRS per diem rate per mile. The most economical form of transportation will be utilized. The Secretary-Treasurer is required to do a cost comparison (Travel by Plane vs. Driving), if the designated representatives and authorized or appointed members much drive more than four (4) hours each way.

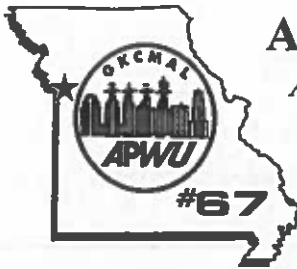
Car Rental

All car rental expenses must be authorized in advance by the Executive Board included on your Travel Authorization before reimbursement can be made.

President

Secretary-Treasurer

Date



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POLICIES AND PAST PRACTICES As amended September 13, 2004 union meeting

1. Pay delegates two hours LWOP and mileage to meeting place and return to attend the Central Labor council meeting. Approved Aug. 2, 1975
2. You must be present for the door prize drawing, except to be excused to go to work. Members must sign their name and tour of duty on back of ticket and give to the Recording Secretary to be eligible for the drawing. Approved Aug. 6, 1977

3. Guidelines concerning the use of an attorney by the local:

- A. Authority: The President or his/her designee with the approval of the Executive Board will have the authority to secure the services of an attorney on an as needed basis.

No individual except the General President or his/her designee shall be authorized to contact or conduct any business with the attorney for this local.

- B. Expenditures: Attorney fees shall be limited to \$500.00 dollars for each occasion unless approval is granted by a majority of the body. Such proposals to exceed this limit shall be recommended by the Executive Board.

An estimate of total cost will be requested before obtaining the service of an attorney.

Progress reports shall be requested periodically and shall include expenses. Approved May 12, 1977.

4. Policy on local arbitration: The President or his/her designee shall have the authority to certify any case for local arbitration. The arbitration will be subject to the approval of the arbitration committee. Approved
5. No candidate for city office will be invited to our meetings since our members come from all parts of the greater Kansas City area and surrounding towns. Approved Feb. 12, 1983.



6. There will be no guest invited to appear before the Executive Board or address the membership at a regular union meeting without prior approval of the Executive Board. Approved April 9, 1983.
7. All notifications of union meetings will be on colored paper. Approved May 1, 1988.
8. Lost time for arbitration witnesses for the local will be paid at the lost time rate with the approval of the President. Approved Sept. 8, 1986
9. The President will police letters from charitable organizations. Those that comply with the constitution will be brought up. Approved Sept. 8, 1986
10. The designee of any officer will have the same expense allowance as the elected official. Approved Nov. 17, 1986
11. All tapes will be kept in the local office for one year under lock and key. Approved Dec. 20, 1986.
12. Elected officers when incapacitated shall receive their salary and expense allowance and the replacement shall receive the same. Approved Dec. 20, 1986
13. No person shall hold two offices and perform the duties of two officers while someone is incapacitated. Approved Dec. 20, 1986
14. The minutes of the Executive Board meeting will contain the names of the board members present. Approved Jan. 12, 1987
15. Craft Directors will responsible for giving all stewards and potential stewards all law-abiding books the local possesses such as the national constitution, local constitution, national and local contract. The local will bear the cost. Approved May 11, 1987.
16. The attendance book for board meetings and union meetings will be closed 1 hour after the start of the meeting and no one will be allowed to sign in. The same rule applies to steward trainings. Approved May 11, 1987.
17. Any time an action involves a union representative, the person involved will be informed first. Approved Feb. 20, 1988.
18. Those on union travel will share hotel rooms with the exception of the State and National convention. Approved July 2004 board meeting.