

2022 BRR TRAVEL/EXPENSE REIMBURSEMENT FORM

This travel/expense reimbursement form must be submitted to Boise Regional REALTORS® by email, mail, or in person, no later than ten (10) calendar days after the qualifying travel or expense took place.

If by mail or in person, send completed form, with receipts, to Boise Regional REALTORS®, 9550 W Bethel Ct, Boise, ID 83709, Attn: Director of Operations. You may also email completed forms with receipts to angela@boirealtors.com. Once approved, a check will be mailed to you within thirty (30) calendar days. Reimbursements will only be made for those items specifically approved in the association's most recent travel policy, unless otherwise previously approved by BRR's CEO or President, or at the discretion of BRR's Board of Directors. Reimbursements *will not* be processed if past the deadline noted, if the form is incomplete, or if required receipts are missing. Thank you!

NAME: _____

ADDRESS (where check will be mailed): _____

PHONE NUMBER: _____ EMAIL: _____

LEADERSHIP POSITION (President, Director, Staff, etc.): _____

PURPOSE OF TRAVEL/EXPENSES: _____

DATE(S) OF TRAVEL/EXPENSES: _____

EXPENSE DESCRIPTIONS/AMOUNTS (attach additional pages if necessary):

_____: \$ _____

_____: \$ _____

_____: \$ _____

SUBTOTAL: \$ _____

LESS DONATION TO THE REALTORS® COMMUNITY FOUNDATION: (\$ _____)

TOTAL REIMBURSEMENT REQUESTED: \$ _____

BY CHECKING THIS BOX, I CERTIFY THAT I AM NOT ASKING BRR TO REIMBURSE ME FOR EXPENSES THAT HAVE ALSO BEEN SUBMITTED TO IR AND/OR NAR FOR REIMBURSEMENT.

Signature: _____

Printed Name: _____

Date: _____

BOISE REGIONAL REALTORS®

2022 TRAVEL POLICY AND EXPENSE REIMBURSEMENT PROCEDURES

Adopted February 2010: Updated March 2022

RULE OF THUMB: Use discretion and good judgement when making purchase while traveling on association business. If you wouldn't normally spend whatever you're about to spend on an item/meal/etc., when traveling on your own, don't spend it when traveling on behalf of BRR. We want you to have a great time and enjoy yourself, in appreciation for the time you're taking away from your business and family, so no need to skimp, but please don't go nuts. ☺

The following outlines reimbursable expenditures for those traveling on behalf of Boise Regional Realtors® (BRR). This policy was adopted by the Finance Committee in 2010, with minor revisions and notes since. This policy is designed to:

- Ensure compliance with minimum Internal Revenue Service (IRS) requirements.
- Ensure that those traveling are reimbursed on a fair and equitable basis.
- Avoid undue record keeping and reimbursement delays.

BRR **will not** reimburse expenses submitted which are not in compliance with IRS requirements or this Travel Policy. A memo will be attached to your reimbursement check indicating how much was not in compliance with instructions to resubmit any items to BRR's Director of Operations. If you feel there are special circumstances, exceptions may be approved at the BRR Board of Director's discretion.

All reimbursement requests must be submitted on BRR's travel/expense reimbursement form within ten (10) calendar days of a completed, approved trip. Forms submitted after ten (10) calendar days may or may not be approved. Under no circumstance will expenses be reimbursed more than thirty (30) calendar days after completion of an approved trip.

Maximum travel reimbursement amount is determined annually by the Board of Directors through the budget approval process. Travel advances will be considered on a case-by-case basis and must be approved by the Chief Executive Officer. Such requests must be submitted in writing at least thirty (30) calendar days prior to the travel date, and if approved, a check will be issued at least seven (7) calendar days prior to the travel date and must be picked up at the BRR office. Should you have any questions regarding these procedures, please contact BRR's Director of Operations at angela@boirealtors.com or 208-890-7977.

RECEIPTS

BRR will not reimburse any expenses over \$25.00 without the original receipt to accompany that expenditure, except ground transportation (i.e., tax, bus, airport limo). However, we strongly recommend that you retain receipts for all expenditures, regardless of dollar amount, to assist with accounting, reconciliation, and any audits, related to charges on BRR credit cards and reimbursements. Your original receipts must be submitted to BRR's Director of Operations no later than ten (10) calendar days after the qualifying travel or expense took place.

- **AIR TRANSPORTATION:** BRR requires receipts for all baggage fees and any air transportation not booked through BRR's corporate travel agent.
- **LODGING:** BRR requires original receipts which include line item expenditures and proof of payment.
- **MEALS AND GROUND TRANSPORTATION:** BRR requires original receipts for all expenditures over \$25.00, except ground transportation (i.e., taxi, bus, airport, rideshare, limo) without the original receipt to accompany that expenditure.
- **GUEST ENTERTAINMENT:** Reimbursable for current President and Chief Executive Officer ONLY.

AIR TRANSPORTATION

BRR's Corporate travel agency should be used for all member air travel, and the airfare will be charged directly to BRR. In certain situations, the member may use their own personal credit cards for airfare. In these cases, the member must complete an expense report for reimbursement, after business travel is completed.

- Reservations are for coach class only.
- Purchase tickets a minimum of fourteen (14) calendar days prior, whenever possible.
- It is the responsibility of the person traveling to confirm all travel details made by BRR and/or our travel agent.
- Changes to travel arrangements after confirmation may be at the expense of the person traveling.
- Airline baggage fees are reimbursable up to \$100 per trip. *(Added 2016.)*

LODGING

- Rooms will be booked at pre-approved conference hotels, when applicable.
- Incidentals are the traveler's responsibility and should be paid upon check out.
- Original receipts with proof of payment are required for reimbursement if not billed through BRR.
- Lodging within a 50-mile radius of Boise, Idaho is not eligible for reimbursement.
- It is the responsibility of the traveler to confirm all travel details made by BRR and/or our travel agent.
- Changes to travel arrangements after confirmation may be at the expense of the traveler.

Should you need to cancel a hotel reservation, it is your responsibility to contact the Director of Operations during BRR's business hours, or the hotel if after BRR's business hours, so that BRR is not charged a "no-show" fee. If a "no-show" fee is charged it may be at the expense of the traveler. *(Added 2018)*

MEALS AND GROUND TRANSPORTATION

- Reasonable meal and daily ground transportation costs reimbursed up to \$150 per day; receipts to be provided. *(Updated 2017)*
- Airport Transfers (taxi, ride share, train, shuttle, etc.): Actual cost; receipts to be provided. *(Updated 2019)*
- Mileage: IRS allowable, not to exceed the cost of airfare. Intended to cover all costs associated with operating a personal vehicle for association purposes, including gas. *(Updated 2021)*
- Parking/Tolls: Actual cost; receipts to be provided, if possible.
- Rental Car: Consult BRR's CEO if you need to rent a car. Rental cars are reimbursable only when other methods of transportation are not obtainable. If car rental is necessary, the collision damage waiver must be purchased at the traveler's expense to ensure the traveler will not be liable for out-of-pocket expenses should an accident occur. Also, gas should be refilled prior to returning the vehicle, whenever possible. *(Updated 2021)*

Use discretion when choosing your method of transportation to and from the airport (i.e., in many cases, if you will be out of town for five (5) or more days, it might be less expensive to use a friend/family member or an airport shuttle versus parking your car at the airport). If you choose to drive to an approved conference or meeting in lieu of flying, reimbursement will be based on reasonable costs, but in no case will you be reimbursed for costs, which in total, exceed the applicable airfare.

GUEST ENTERTAINMENT

- **Reimbursable for current President and Chief Executive Officer ONLY**, who will list guest names and company, along with the business purpose on their receipt and/or expense reimbursement form. Guests are considered to be other industry professionals or BRR members not budgeted for travel.

- Under no circumstances will BRR pay for travel costs, meals, conference fees, entertainment, etc., for spouses, partners, children, friends, etc., of travelers. If a spouse, partner, child, friend, etc., attends an event, meal, etc., the traveler must arrange to pay separately and will be reimbursed for only their portion of the expense. If this practice is not followed, BRR reserves the right to invoice travelers for any expenses incurred for a spouse, partner, child, friend, etc. *(Updated 2019)*

TIPS

- Actual cost up to \$2 per bag for skycap, doorman, and bellman.
- Up to 15% for taxi, depending on distance and service. Up to 20% for dining.

TELEPHONE

- Any BRR business calls are reimbursable.
- Personal calls are NOT reimbursable.
- Air-to-ground calls are NOT reimbursable.
- Reimbursable calls should be made from your cell phone, hotel phone, or a pay phone.

PERSONAL TRAVEL

If you plan to include personal travel in conjunction with your business trip, please contact the Director of Operations and/or our travel agent for assistance coordinating flights, and reimbursing BRR for any difference in the cost of a flight or other expenses. BRR **will not** reimburse any expenses related to personal travel (extra parking, meals, etc.). *NOTE: Personal entertainment (shopping, concert tickets, drinks with friends or family not associated with the event, etc.) is not reimbursable by BRR and should not be charged to a BRR credit card. (Added 2016)*

STATE AND NATIONAL ASSOCIATION MEETINGS

Elected State Directors – BRR members elected to serve as state directors and who attend IR meetings outside of Boise may request up to \$250 per year using BRR's Travel/Expense Reimbursement Form to offset travel expenses. Additional reimbursements may be made at the BRR Board of Director's discretion. Reimbursements are made on a first-come, first-served basis and are not guaranteed. Travel costs and other expenses that are covered or reimbursed by IR or NAR will not *also* be reimbursed by BRR. *(Updated 2017)*

National Committee Members – BRR members who serve on national committees and attend NAR meetings may request up to \$500 per year using BRR's Travel/Expense Reimbursement Form, to offset travel expenses. Additional reimbursements may be made at the BRR Board of Director's discretion. Reimbursements are made on a first-come, first-served basis and are not guaranteed. Travel costs and other expenses that are covered or reimbursed by IR or NAR will not *also* be reimbursed by BRR. *(Updated 2017)*

ASSOCIATION CREDIT CARDS

Some BRR staff use association credit cards for travel in addition to other business-related expenses or purchases. Some Board Officers use association credit cards for travel on behalf of the association as budgeted. The President is also allowed to use the association credit card for meetings and association-related entertaining (as budgeted). Credit cards are issued to the President-Elect and Vice President but are kept at BRR and given out before a trip, and then returned to BRR afterwards with all receipts. *(Added 2018)* Any items charged to a BRR credit card that do not follow these policies will be owed by the member to BRR, and could be placed on the member's account, unless otherwise approved by BRR's CEO or President.