



Volunteer Reimbursement Form

Name & Class: _____
 Address: _____
 Event: _____
 Event Date: _____

For AA Staff use-
 Staff Approved Signature: _____
 Account #/Dept: _____ / _____
 Received/Approved Dates: _____ / _____

Reimbursement Expenses:

Electronic form will automatically tally daily totals and expense total for your report. For plane tickets, use return date. For hotels, daily expense should include taxes and fees for that day. Meals should include tip. Other gratuities are baggage tips, maid service, etc.

Items:	Date:						Notes
		Enter Amount	Enter Amount	Enter Amount	Enter Amount	Enter Amount	
Breakfast							
Lunch							
Dinner <i>Note: per diem meals maximum = \$75</i>							
Hotel Room <i>(incl. room + taxes + fees per night)</i>							
Plane Tickets							
Ground Transportation - Hired <i>(rental, shuttle, bus, train, limo, taxi)</i>							
Mileage Miles x \$0.535 <i>Put mileage on top cell</i>							
Parking							
Tolls							
Gratuities (explain in notes)							
Other (explain in notes)							
							Expense Total
Daily Totals:							

Check Option	Reimbursement Options Please check (X) one option and fill in \$ __ amount	Total Reimbursement	
<input type="checkbox"/>	Reimburse me the total reimbursable expenses.		Reimbursement
<input type="checkbox"/>	Send me no reimbursement . (Please complete and attach Form A . A copy of this report and a signed copy of Form A will be sent to you for tax purposes.)		Requires Form A
<input type="checkbox"/>	Credit the Alumnae Association's Founder's Fund with the net amount as a donation.		Founder's Fund
<input type="checkbox"/>	Credit the Alumnae Association's Founder's Fund for amount shown as a donation in my name and send remainder to me as partial reimbursement		Founder's Fund Reimbursement
<input type="checkbox"/>	Credit the Mount Holyoke Fund with the net amount as a donation.		Mt Holyoke Fund
<input type="checkbox"/>	Credit the Mount Holyoke Fund for amount shown as a donation in my name and the remainder to me as partial reimbursement .		Mt Holyoke Fund Reimbursement
<input type="checkbox"/>	Credit the Alumnae Association's Founder's Fund for amount shown as donation in my name and credit the Mount Holyoke Fund for amount shown as donation in my name and send the remainder to me as partial reimbursement .		Founder's Fund Mt Holyoke Fund Reimbursement
	Balance left:		This should be 0

Signature: _____ Today's Date: _____

Send this form with receipts within 30 days of event. Please sign and mail along with all original receipts to: [your liaison], Alumnae Association of Mount Holyoke College, Mary Woolley Hall, 50 College Street, South Hadley, MA 01075-1486



Form A of Volunteer Reimbursement

Alumnae Association of Mount Holyoke College

Form A is for tax purposes. Please complete only when “no reimbursement” is requested on expense report. If you are making a donation to the Founder's Fund or the Mount Holyoke Fund, you do not need to complete this form.

Please complete this form by filling in your name, the date(s) of your volunteer activity, and the nature of your volunteer work. Send the completed form to:

Alumnae Association of Mount Holyoke College
50 College Street
South Hadley, MA 01075-1486

We will sign and return the original to you.

Dear _____ ,

Thank you for your volunteer work on behalf of the Alumnae Association of Mount Holyoke College and for the expenses you incurred in the course of your volunteer activities, which have not been reimbursed by the Association.

In particular, we appreciate your services provided on _____ , for the purpose of _____ . No goods or services were provided to you in exchange for your contribution.

Please note that you can claim your volunteer expenses, as allowed by Internal Revenue Code, on your federal tax return by filing form 1040 and itemizing on Schedule A. To do so, you must maintain adequate records of your unreimbursed expenses, including mileage log(s) and receipts for transportation, meal and lodging expenses. IRS Publication 526, *Charitable Contributions*, has more information on records that substantiate a donor's contribution deductions.

Karen Northup-Scudder
Senior Director of Finance and Administration

Date



Expense Policy

for Association Officers, Committee Members, and Volunteers
Alumnae Association of Mount Holyoke College

Reimbursement Philosophy

In an effort to manage the Alumnae Association's volunteer travel expenses and focus our financial resources on the delivery of services to all alumnae, the Association is asking all volunteers to travel as economically as is reasonably possible. This includes, but is not limited to:

- Booking flights in advance to secure good rates, and flying coach.
- Leasing compact cars only if it is more economical than airport shuttles, carpooling when possible.
- Selecting transportation to and from airports based on cost as well as convenience.
- Choosing economical parking, such as "long-term" parking at the airport rather than "short-term."
- When staying overnight on campus, using Willits-Hallowell (or a nearby hotel if Willits is full), and sharing the room with another alumna if possible.
- Choosing economical dining options.

We understand that some of our volunteers will choose not to follow our travel guidelines. In those cases, the Association will ask the volunteer to share the costs, with the Association's portion based on the estimated cost had the travel guidelines been followed.

We hope this policy will allow our volunteers to travel in a manner that accommodates their preferences and circumstances while also controlling Association costs.

Qualifying Expenses

The Alumnae Association will reimburse expenses for volunteers only. Expenses for spouses/partners or children who accompany the volunteer are not reimbursable.

Reimbursable Expenses

- Transportation: Auto mileage over 350 miles each way must be preauthorized.
- Transportation: Airfare, train, bus, car rental, mileage, taxi, limousine, airport shuttle
- Associated transportation: parking fees, tolls
- Hotel accommodations
- Meals
- Postage

Non-Reimbursable Expenses

- Alcoholic beverages

Reimbursement Options

We are frequently asked which of the available reimbursement options is best for the Alumnae Association. The answer is "some of each" Alumnae who choose not to submit for reimbursement assist the Association in controlling costs and meeting our operating budget. Alumnae who donate reimbursements to the Founder's Fund help us grow the fund, which we consider critical to providing for the long-term stability of the organization. Donations to the Mount Holyoke Fund advance the many goals of the College. We encourage volunteers to choose the reimbursement option that works best for them.

Questions

If you have any questions, please call Karen Northup-Scudder, Senior Director of Finance and Administration at (413) 538-2736 or email knorthup@mtholyoke.edu.

-The Association will reimburse/pay for a shared double room, or for half the cost of a single room should the alumna choose not to share a room.

-The Association will reimburse for meals incurred while en route to your meeting/event (for example, during a layover between flights), and for meals purchased once you have arrived on campus. Note that most meals are provided while you are on campus. The Association does not reimburse for a meal purchased in lieu of one provided. We generally do not pay for meals purchased prior to an alumna leaving to come to campus, or after an alumna arrives back home.