

# Volunteer Reimbursement Form

Name: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City, State, Zip \_\_\_\_\_  
 Class or Club \_\_\_\_\_  
 Event/Event Date \_\_\_\_\_ / \_\_\_\_\_

**For Financial Services use:**  
 Voucher Number: \_\_\_\_\_

**For Alumnae Association Staff use:**  
 Received/Approved Dates: \_\_\_\_\_ / \_\_\_\_\_  
 CO - AU - ACCT: **70 -** \_\_\_\_\_ **- 84200**  
 Staff Approved Signature: \_\_\_\_\_

## Reimbursement Expenses:

Electronic form will automatically tally daily totals and expense total for your report. **Please be sure to download this PDF form to your computer in order to have your expenses automatically update on this form.** 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, housekeeping service, etc.

Items:	Date:					Sub-Account	Totals:	Notes:
	Enter Amount	Enter Amount	Enter Amount	Enter Amount	Enter Amount			
<b>Meals</b> <small>Note: per diem meals maximum = \$75</small>						-0083		
<b>Hotel Room</b> <small>(incl. room + taxes + fees per night)</small>						-0082		
<b>Plane Tickets</b>						-0081		
<b>Other Trans</b> <small>(rental, shuttle, bus, train, limo, taxi/Uber)</small>						-0085		
<b>Mileage</b>								
<b>Miles x \$0.575</b> <small>Put mileage on top cell</small>						-0084		
<b>Parking</b>						-0085		
<b>Tolls</b>						-0085		
<b>Gratuities</b> <small>(explain in notes)</small>						-0086		
<b>Other</b> <small>(explain in notes)</small>						-0086		
	Date:							<b>Expense Total:</b>
<b>Daily Totals:</b>								

## Reimbursement Donations Statement

We are frequently asked which of the available reimbursement options is best for the Alumnae Association. The Association is pleased to reimburse alumnae for approved expenses for their volunteer work. Alumnae who choose not to submit for reimbursement assist the Association in controlling costs and reducing our operating budget. Please note that the Association does not credit expense reimbursement directly to the Founder's Fund. And, Mount Holyoke College does not allow for such expenses to be credited directly to the College as gifts-in-kind in lieu of reimbursement. Volunteers should save their receipts and consult with a tax advisor to determine whether their expenses are deductible (see page five of IRS Publications 526 for more information). Or, volunteers can choose to be reimbursed and then consider a formal donation to the Association's Founders Fund or the College. We encourage volunteers to choose the reimbursement option that works best for them.

Check Option	Reimbursement Options	
<input type="checkbox"/>	Reimburse me the total <b>reimbursable</b> expenses.	Reimbursement
<input type="checkbox"/>	Send me <b>no reimbursement</b> . (Please complete and attach <b>Form A</b> . A copy of this report and a signed copy of Form A will be sent to you for tax purposes.)	Requires Form A

Signature: \_\_\_\_\_

Today's Date: \_\_\_\_\_

Send this form with receipts within 30 days of event. If sending materials electronically, please be sure your receipts are legible! If sending USPS, please sign & mail along with all original receipts. For Board of Directors send to Diane Stanton; for all other volunteer's/committee members, please send to Kathy Cadorette, 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.

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.

---

Nancy Perez  
Executive Director

---

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, Uber, Lyft
- Associated transportation: parking fees, tolls
- Hotel accommodations <sup>1</sup>
- Meals <sup>2</sup>

### Non-Reimbursable Expenses

- Alcoholic beverages

## Questions

If you have any questions, please call your liaison.

---

<sup>1</sup> 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.

<sup>2</sup> 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.