

# Tennessee Bar Association Young Lawyers Division Expense Reimbursement Policy

## I. GENERAL POLICIES

- A. Reimbursement Request Procedure. All requests for reimbursement must be submitted on a reimbursement request form within thirty (30) days after the expense is incurred. Expense Reimbursement Requests should be submitted to the Young Lawyers Division (Division) Treasurer.
- B. Supporting Documentation Required. Supporting documentation for all expenses (other than automobile mileage and gratuities incurred separately from meals) must accompany each request. Such documentation may be in the form of receipts, invoices from suppliers, law firm expense statements, credit card statements or canceled checks.
- C. General Limitation Approval. All expenses must be incurred for activities or in the performance of services or duties on behalf of the Division or the Tennessee Bar Association (Association). The Division President, Division Treasurer and Association Executive Director shall approve all reimbursements. Advance approval is strongly recommended for any expense not included in, or in excess of, the applicable budget.
- D. Annual/Mid Winter Meeting. If the Division meets in conjunction with the Association Annual Meeting, Mid-Winter Meeting or any other meeting with a registration requirement or fee, members will be reimbursed for travel if they register for the meeting.

## II. TRAVEL EXPENSES

- A. Airfare. Airfare will be reimbursed for distances of more than four (4) hours if traveled by car. Airfare will be reimbursed at lesser of the actual fare or standard coach fare at the 21 day advanced fare price. Reduced fares should be requested at all times. Penalties incurred for flight changes may be reimbursed if the fare was incurred in a reasonable attempt to reduce costs and matters beyond the traveler's reasonable control necessitated the change in plans. Advance purchase of tickets to obtain reduced fares may be reimbursed in advance of travel. Persons who elect to travel by air within shorter distances will be reimbursed at the automotive mileage rate. Airfare costing more than \$400 must be approved in advance. The Division will reimburse the cost of using a private airplane for division business provided that: (a) the use of the airplane is approved in advance by the Division President and Association Executive Director and (b) the cost of using the private airplane for official business does not exceed the cost of the equivalent coach-class commercial flight. If more than one person flies on the plane, only the actual costs of the flight can be reimbursed, consistent with (a) and (b) above, even if the Division would have paid for commercial flights for more than one person.
- B. Mileage. Automotive travel will be reimbursed at the current IRS business mileage rate. No reimbursement will be granted for the cost of rental automobiles unless authorized in advance by the Division President and Association Executive Director.
- C. Other Travel. Travel by bus, train, boat, helicopter or other unusual means will be reimbursed at the lesser of actual fare or applicable airfare or automotive rate.
- D. Taxi, Shuttle Fares; Parking and Tolls. Taxi, shuttle or train service between the airport and the meeting site will be reimbursed. Other intra-city taxi fares will be reimbursed only if incurred directly on Division business. Reimbursement for parking will be limited to \$35 per day.
- E. Lodging. Lodging will be reimbursed at the single occupancy room rate unless additional occupants also are directly entitled to reimbursement. With regard to events for which the Division or Association has negotiated a special rate, reimbursement will be limited to that rate even if the traveler registers too late for the special rate, upgrades to a room class not part of the room block or chooses to stay at a different facility and pays a higher rate. No reimbursement will be granted for lodging in one's own city of residence.
- F. Meals. Reimbursement for meals and beverages will be the actual cost (including tips) up to \$60 per day. The Division will not reimburse for meals when an official event is planned that offers food and beverage. Reservations for meals that are not cancelled within 24 hours of the event, except in emergency situations, will result in the per person cost of the meal being deducted from the board member's reimbursement.
- G. Tips. Reimbursement for gratuities other than with meals will be limited to \$10 per day.

## III. OTHER EXPENSES

- A. Telephone, Fax, and Photocopies. The actual out-of-pocket expense for telephone calls and facsimiles related to Division business will be reimbursed whether incurred in connection with travel or otherwise. Members are encouraged to provide facsimile services (other than actual out-of-pocket costs) to the Division free or at a reduced rate. Copies made by members utilizing a source other than the Association or contract suppliers must be approved in advance by the Division President and Association Executive Director. Photocopying will be reimbursed at the rate of up to \$.10 per copy not to exceed 500 copies per calendar month. Members strongly are encouraged to prepare materials for copying sufficiently in advance to be copied or printed at Association headquarters.
- B. Nonreimbursable Expenses. Entertainment expenses, in-room movies, phone and telecopy charges not for Division business, intra-city transportation not necessary for Division business, and any other personal or non-Division expenses are not reimbursable.

## IV. YOUNG LAWYER DELEGATES TO THE ASSOCIATION HOUSE OF DELEGATES

- A. Joint House of Delegates and Division Meetings. The delegates holding seats specifically designated for young lawyers in the Tennessee Bar Association House of Delegates should submit a standard Association Expense Reimbursement Request to the Association Accounting Department and be reimbursed for House of Delegate expenses from the Association budget. For expenses associated with Division meetings not covered by the House of Delegates, the delegates should submit reimbursement requests to the Division Treasurer. Delegates will be reimbursed by the Division in accordance with its reimbursement policies for expenses not covered by the House of Delegates.
- B. Other Division Meetings. Reimbursement for attendance at all other Division meetings will be at the discretion of the president.

## V. JOINT MEETINGS WITH ASSOCIATION BOARD OF GOVERNORS

- A. General Policy. The Division President and President-Elect will be reimbursed for Association Board of Governors meetings from the Board of Governors budget. Officers should submit a standard Association Expense Reimbursement Request to the Association Accounting Department. Expenses related solely to the Division will be reimbursed from the Division's meetings budget. Officers should submit a separate reimbursement form for those expenses to the Division Treasurer.

## VI. AMERICAN BAR ASSOCIATION MEETINGS

### A. General Policies.

- i. Funding Source. Division members who hold Association seats in the American Bar Association House of Delegates should submit a standard Association Expense Reimbursement Request to the Association Accounting Department and will be reimbursed from the Association budget. Expenses incurred for ABA Young Lawyer Division activities will be reimbursed from the Division's "ABA Participation" budget. Delegates should submit a separate reimbursement form for these expenses to the Division Treasurer.
- ii. Deducting ABA Reimbursement. Delegates who are entitled to partial reimbursement of their costs from the ABA should submit reimbursement forms to the ABA and deduct any reimbursement received from the request submitted to the Division or Association.
- iii. Applicability of Standard Policies. All requirements and limitations set out in the standard YLD reimbursement policy and reimbursement request form apply to reimbursement requests submitted for ABA YLD meetings. These include, but are not limited to, daily limits on food and parking, requirements for receipts, and advanced authority for rental cars and flights over \$400.

### B. Specific Meeting Policies.

- i. ABA Annual Meeting (August). The TBA Young Lawyers Division (YLD) President chooses five delegates to attend this meeting, at which the ABA and ABA YLD both hold meetings. The YLD Assembly takes place on Friday afternoon and Saturday morning. No funding is available from the ABA. Delegates are funded by the TBA YLD's "ABA Participation" budget. At the discretion of the TBA YLD president, reimbursements may cover all expenses or be capped at a pre-determined amount. In either case, reimbursements are limited to authorized expenses and are dependent on delegates becoming certified and attending both Assembly meetings.
- ii. ABA YLD Fall Conference (October). The TBA YLD President chooses up to five delegates to attend this meeting. This YLD only meeting focuses on program development and affiliate outreach. The TBA YLD delegates are given a two day per diem of \$100 per day from the ABA provided they attend the plenary session and at least one block of programming on Friday and one block of programming on Saturday. Supplemental funding is available through the TBA YLD's "ABA Participation" budget only if delegates qualify for the ABA per diem. At the discretion of the TBA YLD president, supplemental funding may cover remaining expenses in full or be capped at a pre-determined amount. In either case, reimbursements are limited to authorized expenses and delegate attendance at assigned meetings.
- iii. ABA Midyear Meeting (February). The TBA YLD President chooses five delegates to attend this meeting, at which the ABA and ABA YLD both hold meetings. The YLD Assembly takes place on Friday afternoon and Saturday morning. No funding is available from the ABA. Delegates are funded by the TBA YLD's "ABA Participation" budget. At the discretion of the TBA YLD president, reimbursements may cover all expenses or be capped at a pre-determined amount. In either case, reimbursements are limited to authorized expenses and are dependent on delegates becoming certified and attending both Assembly meetings.
- iv. ABA YLD Spring Conference (April/May). The TBA YLD President chooses up to five delegates to attend this meeting. This YLD only meeting focuses on program development and affiliate outreach. The TBA YLD delegates are given a two day per diem of \$100 per day from the ABA provided they attend the plenary session and at least one block of programming on Friday and one block of programming on Saturday. Supplemental funding is available through the TBA YLD's "ABA Participation" budget only if delegates qualify for the ABA per diem. At the discretion of the TBA YLD president, supplemental funding may cover remaining expenses in full or be capped at a pre-determined amount. In either case, reimbursements are limited to authorized expenses and delegate attendance at assigned meetings.