

# IEEE Bombay Section Expense Reimbursement Policy

---

V2.0 (2022)

Prepared by : Anand S Gharpure

## Contents

1.	OVERVIEW AND SCOPE.....	3
2.	RESPONSIBILITIES .....	3
3.	EXPENSE LIMITS.....	4
4.	COMMUNICATION.....	4
5.	LOCAL TRAVEL .....	4
6.	DOMESTIC TRAVEL .....	5
6.1.	TRANSPORTATION ENTITLEMENT.....	5
6.2.	HOTEL CHARGES (LODGING) .....	6
6.3.	PERSONAL ALLOWANCES (BOARDING) .....	6
7.	INTERNATIONAL TRAVEL.....	6
7.1.	TRANSPORTATION ENTITLEMENT.....	6
7.2.	HOTEL CHARGES (LODGING) .....	6
7.3.	PERSONAL ALLOWANCES (BOARDING) .....	6
8.	EXECOM MEETINGS .....	7
9.	GENERAL TERMS.....	7
10.	MODALITIES .....	8

## 1. Overview and Scope

IEEE & IEEE Bombay Section appreciates the spirit of volunteering among its members and values the time and efforts of its volunteers. IEEE Bombay Section also appreciates the member-volunteers recognize the fact that IEEE Bombay Section is not-profit organization for benefit of the members and therefore do not provide for the luxury but for the necessity while seeking to reimburse volunteers for expenses incurred for undertaking section-related activities.

This Policy is intended to be used as a guideline to regulate and monitor such expenses (communications, traveling, boarding and other expenses) incurred by IEEE members ("Volunteers"), while organizing events/undertaking routine activities for IEEE ("Official Work"). This policy applies to expenses incurred by member volunteers of IEEE Bombay Section, as well as other non-member volunteers, where the section has agreed to reimburse such costs.

Expenses incurred for routine section activities are included. The events that are covered would be approved by the Execom from time to time. Members officiating for section events are also covered under this policy.

All expenses will be linked to specific budgets (Section, Society Chapters, Affinity Groups or Event) and would need recommendation/approval of the budget-owner or execom as the case maybe.

The general guidelines given in this policy document are designed to support the intent of the program. Each Volunteer has a responsibility to follow these guidelines with good judgment and personal integrity. The section will review and update this guideline on a time-to-time basis. The expenses within the policy guidelines doesn't need further approval for reimbursement/release of the payment on the submission of the bills however any excess limit which is not pre-approved need the approval of the Office Bearers and/or Execom.

## 2. Responsibilities

It is the responsibility of Section Office bearers and volunteers to ensure these guidelines are followed.

Specifically, Chair / Chair-elect / Secretary with Treasurer & Execom will be are responsible for:

1. Approving the Budgets and expenses.
2. Pre-Approving Excess amount in case of extra-ordinary situation and to be placed before Execom during next Execom.
3. Limiting the number of volunteers to those necessary to undertake the official work.

Treasurer will be are responsible for:

1. Ensuring that this Policy is followed by volunteers seeking authorization of expenses.
2. Reviewing expenses to ensure compliance with the Policy.
3. Granting advances, if approved, in timely manner.
4. GST Invoices have section GST Number pre-printed before releasing the payment.
5. Any excess amount which was not pre-approved, to be placed before Execom before disbursement.
6. GST Invoices should be sent as soon as invoice is received or no later than 7<sup>th</sup> of Next Month

7. Individual Claims with GST not received before 7<sup>th</sup> of Next Month should be reimbursed without GST only.
8. No Individual claims to be reimbursed post 3 months of the expenses.
9. All Advances should be settled within 90 days of issue & on 31<sup>st</sup> March every year irrespective of days.

Volunteers are responsible for:

1. Complying with the policies and procedures outlined in this Policy.
2. Controlling expenses.
3. Ensuring submission of accurate Expense Reports.
4. Identifying and paying for personal expenses.
5. Submitting the GST Number for Travel while booking.
6. Submitting the GST Number for Purchase such as Memento, Stationery etc.
7. Submission of bills before 5<sup>th</sup> of the next month for expenses made during previous month.
8. Submission of Declaration in the absence of bill / invoice (subject to Max Rs. 500/-)
9. Determining that the official work is essential and that the benefits of such expense cannot be achieved through other economical means.
10. All advances are settled within 90 days as well as on 31<sup>st</sup> March every year.

### 3. Expense Limits

1. All expenses would be at actuals, subject to limits and submission of vouchers.
2. Any excess baggage expenses, in addition to the usual airline or railway entitlement are not normally provided. In particular cases, where justified by needs, these may be authorized by the Section Chair on recommendation of Execom / Budget Owner.
3. Post facto approvals should not be encouraged.
4. Sub Section, Chapters, Affinity Groups are part of IBS are being governed by the limit as mentioned in this document.
5. Special Projects Grants, Chapter Proposal Grants are also being governed by the limits as mentioned in this document.
6. Student Branch rebates, if transferred directly to Student Branch Accounts, are exempted from these limits.

### 4. Communication

1. Volunteers would be reimbursed local communication charges (phone and Internet) for section-approved activities however with the advent of technology, members are encouraged to use their own devices during domestic travels
2. All reimbursement requests must be accompanied by vouchers/proofs, if exceeding Rs.500/- per month (combined costs).
3. The limits are Rs.500/- per month each for Internet and phone charges.

### 5. Local Travel

This would cover expenses within the city/town of residence as well as official visit (if not provided by Host) of the volunteer.

1. Volunteers are encouraged to Pool the rides wherever feasible/possible.
2. Metered taxi / Auto / Bus / Train at Actuals
3. Volunteers are encouraged not to opt for Surge Rides of Ola/Uber or similar private operators.
4. Use of own small car at Rs.12/- per km and large car at Rs. 15/- per km or two-wheeler at Rs.5/- per km plus toll-taxes as applicable.
5. Use of small car is encouraged up to 3 Persons (including Volunteers/Guests) and Large Car is recommended over 4 persons (including Volunteer/Guests). Small car is generally capped at Rs.12/- per km and large car is generally capped at Rs. 15/- per km with minimum 300 kms per day plus toll-taxes as applicable. Volunteers are required to negotiate for lower rates.
6. Volunteers are also encouraged to ensure the Minimum Distance is being covered, if opted for commercial vehicles.
7. Incidental expenses are permitted as per actual and up to Rs. 500/- per day

## 6. Domestic Travel

This would cover travel within the country and outside the city/town of residence of the volunteer

### 6.1. Transportation Entitlement

Category	Air*	Rail	Road
Class	Economy	AC 2T/CC	AC Taxi

1. \*Air travel is permitted if the corresponding train journey is for more than 8 hours and less than 14 Hours with Overnight connections not available.
2. \*Air travel is permitted if the corresponding Air Fares are less than 130% of non-dynamic AC 2T/CC without any approval.
3. \*Air travel is permitted if the volunteer claims an amount equal 130% of non-dynamic AC 2T/CC or lower at actual without any approval.
4. \*Air travel is permitted for less than 8 hours, if plans for being finalized within 7 days of event during Off-Peak Period or within 15 days of event during Peak Period subject to pre-approval of the Execom / Budget-Owner.
5. All volunteers are encouraged to limit the choices of Air Travel such that per Km cost should be less than 8/- for busy route (Bombay-Delhi), 10/- for regular route (Bombay-Bhopal) and 12/- for Remote Route (Bhopal-Goa via Delhi).
6. If the journey by entitled class is not practicable, in such case the journey may be performed by the next higher class subject to pre-approval of the Execom / Budget-Owner.
7. Volunteers are encouraged to pool rides to/from Airport whereas feasible/possible.
8. Air Travels & Trains Travels entails the GST benefit for the section and volunteers should

submit the GST while booking.

## 6.2. Hotel Charges (Lodging)

All efforts should be made to stay in a Guesthouse, wherever available. Hotels in Maharashtra States entail the GST Benefits for the section and volunteers should submit the GST.

Location	Per Night Limits (inclusive of GST)
Metropolitan Cities	RS. 6,000/-
Municipal Corporation Cities	RS. 4,000/-
Rest of India	RS. 3,000/-

## 6.3. Personal Allowances (Boarding)

Location	Stay in Hotel	Guest House Stay
Metropolitan Cities	RS. 2,000/-	RS. 1,500/-
Municipal Corporation Cities	RS. 1,750/-	RS. 1,250/-
Rest of India	RS. 1,500/-	RS. 1,000/-

# 7. International Travel

This would cover travel outside India. In case the admissible expenses for a particular destination are insufficient to meet the living expenses, advance approval need to be obtained from the section chair / Chair Elect with the recommendation of IPC/Secretary/Treasurer

## 7.1. Transportation Entitlement

Category	Air	Rail	Road	Local Journey
Class	Economy	Coach Class	AC Taxi	On actual

## 7.2. Hotel Charges (Lodging)

Location	Per Night Limits (inclusive of GST)
Global Cities / Mega Cities (London, New York, Tokyo, Frankfurt, Paris etc)	USD 250
Rest of the World	USD 200

## 7.3. Personal Allowances (Boarding)

Location	Allowance (per Day)
Global Cities / Mega Cities (London, New York, Tokyo, Frankfurt, Paris etc)	USD 150
Rest of the World	USD 100

## 8. Execom Meetings

1. All locally resident Execom members of the Execom Meeting place will be reimbursed flat RS. 1000/-to cover incidentals for attending the section Execom meetings (physically), typically held 12 times in a calendar year without any submission of bills.
2. The reimbursement shall be made at each Execom with proper receipts.
3. All Non-local Execom Members are eligible for the reimbursement as per Domestic Travel norm outside city.

## 9. General Terms

1. The Personal Allowance would be reimbursed on actuals, upto the limits mentioned above.
2. Itemized original receipts are required for all expenses. In cases receipts are not available; the volunteer must provide an explanation for the expense in the travel claim form, noting that the failure to provide a receipt for any item over RS. 500/ USD 15 may result in denial of reimbursement.
3. Tips/ gratuities would be allowed up to reasonable limits, based on practices of the city/ country of travel. This would be included in the limits specified above. Volunteers are expected to understand local practices and avoid excess/ improper tipping. In no event should tips exceed RS.200/- per day (for domestic/local) USD 15 per day (for International).
4. Meals purchased for other volunteers who are traveling for IEEE sponsored activities may be included in the travel settlement form. This will be allowed only if the volunteer specifies the names of volunteers for whom the meal was purchased and such expenditure would not otherwise exceed the individual entitlements.
5. Incidental Allowance of USD20 will be paid to cover any incidental expense for international transit time over 3 hours. This amount is also required to be settled by appropriate vouchers or a proper explanation if vouchers are not available.
6. Airport transfer or airport pick-up & drop will be reimbursed on actuals.
7. Inter-city travel costs within a foreign country in the course of the trip will be reimbursed on actual
8. All other IEEE Event/Activity related expenses will be reimbursed at actuals. This would include communication expenses (like internet access, temporary mobile phone connection charges, phone calls etc.), stationery expenses, expenses due to meetings and

the like.

9. Local travel/ conveyance while on tour will also be reimbursed at actuals. Car rentals will be allowed for local travel while on foreign trip.
10. Laundry expenses at actuals will be allowed for trips that last more than 4 days.
11. Any expense pertaining to personal entertainment and services (eg. mini-bar, spa, barber, non-complimentary health clubs, sporting events, country clubs, social events, personal invitations, etc.), theft of personal effects, sightseeing and personal side trips and the like will not be reimbursed.
12. In case any activity is undertaken along with the business travel of a member, only such expenses that are solely incurred for IEEE Official work may be claimed. Travel expenses of one side may be claimed, if not already reimbursed by the business travel
13. Any exception needs to be approved by the Section Chair / Chair Elect on recommendation of IPC/ Treasurer/Secretary

## 10. Modalities

1. Official domestic/international tours should be approved in advance.
2. For International travel, cash/ travellers Cheques may be drawn in advance
3. Claims need to be submitted to admin along with prior approval (as applicable) within 1 month of incurring expense or return from travel, whichever is later.
4. Travel approvals and Expense claims shall be submitted in prescribed formats, which would be available for download from the section website