

United Way of Southwest Minnesota

Expense Reimbursement Policy

1. Purpose

The Board of Directors of United Way of Southwest Minnesota (UWSWMN) recognizes that employees (“Personnel”) may occasionally be required to travel or incur expenses to conduct organizational business and further our mission. UWSWMN reimburses expenses for staff only. Board members are not eligible for reimbursement.

This policy ensures:

- Adequate cost controls
- Appropriate travel and expenditures
- A consistent process for timely reimbursement of authorized expenses

Personnel are expected to:

- Use discretion and good judgment
- Spend UWSWMN’s resources as carefully as their own
- Report expenses accurately and provide required documentation

2. Expense Report Requirements

Expense reports must be submitted at the end of each month.

Reports must include:

- The individual’s name
- For travel: dates, origin, destination, purpose, and description of UWSWMN-related activities
- Names and affiliations of individuals for whom expenses were incurred
- An itemized list of all expenses

3. Receipts

Receipts are required for all reimbursements.

Receipts must be itemized and include:

- Vendor name
- Description of services or purchases
- Date
- Total amount (including tips, if applicable)

Credit card statements alone are not acceptable documentation.

4. Cell Phone Use

The CEO shall receive a monthly cell phone reimbursement as approved by the Board. Employee reimbursement for cell phone use may be authorized by the CEO when business needs require it.

5. General Travel Requirements

Advance Approval

- Air travel or any overnight travel requires supervisor approval
- Out-of-state travel requires approval from the CEO or Board Chair

Necessity of Travel

Personnel and supervisors must consider:

- Benefit to UWSWMN
- Costs versus value
- Alternatives such as virtual participation or local training

Personal or Spousal Travel

Personal travel may be combined with business travel only if doing so does not:

- Increase UWSWMN costs
- Complicate travel arrangements

Expenses for spouses, family, or friends are not reimbursable.

6. Air Travel

- Book early to secure reduced fares
- Reimbursement is limited to the lowest-cost coach fare for direct, non-stop flights when available

Saturday Stays

Not required. If chosen:

- Lodging and meal expenses may be reimbursed only up to the airfare savings
- Fare difference documentation must be submitted

Frequent Flyer Miles

Personnel may retain miles and denied-boarding compensation. Selecting more expensive fares solely to earn miles is prohibited.

7. Lodging

UWSWMN will reimburse the single-room rate for reasonable, standard accommodations. Luxury or premium hotel stays are not reimbursable.

8. Out-of-Town Meals

Reimbursement includes:

- Reasonable actual meal costs (including tips)
- Up to a daily per-diem of \$60.00

Necessary gratuities not included in meals may also be reimbursed.

9. Ground Transportation

Personnel must choose the most economical option:

1. Courtesy cars
2. Shuttles or buses
3. Taxis
4. Rental cars (approval required and must be cost-effective)

10. Personal Cars

Mileage reimbursement is based on the current IRS standard mileage rate.

For trips where airfare is typical, reimbursement must not exceed the lowest available round-trip coach airfare.

11. Parking and Tolls

Reimbursable:

- Parking fees
- Tolls
- Hotel parking

Not reimbursable:

- Parking tickets
- Valet service (unless required)
- Car washes

12. Entertainment & Business Meetings

Prior approval from a designated officer or director is required.

Documentation must include:

- Date and location
- Nature of the expense
- Names and affiliations of attendees
- Business purpose and topics discussed
- Vendor receipts

13. Non-Reimbursable Expenses

UWSWMN will not reimburse expenses that are lavish, excessive, or inappropriate, including:

- Travel insurance
- First-class airfare or upgrades
- Luxury lodging
- Limousine services
- Alcoholic beverages
- Movies or in-room entertainment
- Club memberships
- Sporting events (unless pre-approved)
- Spa or fitness services
- Clothing or personal items
- Expenses for spouses, friends, or relatives
- Overnight retreats without Board approval

Review of Policy

This policy will be reviewed at least every three years, with revisions requiring Board approval.

Approved by the Board of Directors on:

April 20, 2026