

Oregon State Bar Expense Reimbursement Policy

1. General Policy

- a. This policy applies to participation at conferences and meetings or other official Bar business as member of a specified Board, or as an employee of the Oregon State Bar.
- b. Members of the Board of Governors, Board of Bar Examiners, State Professional Responsibility Board, and Disciplinary Board shall be reimbursed for their expenses in accordance with this policy when acting in their official capacities. Expenses of board or committee members or employees shall not be reimbursed when attending meetings or conferences in a non-official capacity of the bar.
- c. Expenses of spouses or guests shall not be reimbursed except for: (1) specifically budgeted conferences and meetings; (2) bar-sponsored functions where their attendance is specifically expected; and (3) as otherwise approved by the Board of Governors.
- d. Requests for expense reimbursement **must be received by the bar not later than 30 days** after the expense is incurred. If an expense reimbursement form is not submitted within 30 days after the meeting, it must include justification as to why it was not timely submitted. If this requirement is not met, reimbursement will not be paid.
- e. **Supporting documentation**, e.g. receipt or ticket, **is required** for air, bus, taxi, train, rental car transportation, parking and lodging. Credit card bills **cannot be accepted** in lieu of receipts. **Documentation must show details of purchase.**

2. Out-of-State Travel

- a. Out-of-state travel for Board members shall be reimbursed for those persons and meetings set forth in the bar's annual budget or as otherwise approved by the Board of Governors.
- b. Employees must obtain approval of the Executive Director prior to traveling out of state.

3. Reimbursable Expenses While on Official Business

- a. Transportation
 - (1) Use of personal automobile shall be reimbursed at the allowable IRS rate.
 - (2) Actual cost of air coach fare.
 - (3) Actual cost for taxi, bus, or other public transportation.
 - (4) Actual cost of car rental at economy car rate when other transportation is not readily available.
 - (5) Actual cost of parking (receipt must be attached or note parking was paid through a meter).
- b. Lodging - Actual cost for a moderately priced double occupancy room, except when the location of the meeting or conference requires other arrangements. Lodging of members or employees at personally-owned residences, vacation homes or timeshare condos are not reimbursable. Fees for pet, fitness center, resort usage and special cleaning are not reimbursable.

c. Meals

- (1) reimbursement for **meals without receipts** shall be made at actual cost within the limits of the following schedule:

	In Oregon	Out-of-state
<u>Total per day</u>	<u>\$66.00</u>	<u>\$71.00</u>
Breakfast	\$11.00	\$12.00
Lunch	\$16.00	\$18.00
Dinner	\$34.00	\$36.00
Incidentals	\$ 5.00	\$ 5.00

- (2) In the event that the meals exceed the maximum limits, **DETAILED RECEIPTS** must be submitted with explanation in order to receive reimbursement and must be approved by the Chief Financial Officer or the Executive Director.

- (3) Meals purchased for members of the bar or other persons in the course of official bar business shall be reimbursed at actual cost with submission of detailed receipts, the names of attendees and a description of the business purpose of the event.

- (4) Official dinners, meetings or banquets of the Oregon State Bar at which eligible persons and their spouses/guests are specifically expected to attend shall usually be paid for by the Bar and, if not, shall be eligible for reimbursement.

d. Miscellaneous

- (1) Telephone, postage, office expense, registration fees, and other legitimate business expense items shall be reimbursed at actual cost with submission of DETAILED RECEIPTS and explanation of purpose of expense.

- (2) Gift and gift card purchases must be accompanied by detailed receipts indicating the business purpose of the gift, and the name of gift recipient(s).

- (3) Personal expense items shall not be reimbursed by the Oregon State Bar.

e. Non-Reimbursable Expenses

- (1) Alcoholic beverages: bar funds (including funds of sections) shall not be used to pay the cost of alcoholic beverages.
- (2) Movie rentals and other entertainment related fees will not be reimbursed.
- (3) Lodging of members at their own residences, vacation homes or timeshare condos are not reimbursable.
- (4) Fees for pet, fitness center, resort usage and special cleaning are not reimbursable.
- (5) Fees resulting from parking or traffic tickets are not reimbursable.