



# SOUTH DAKOTA HISTORICAL SOCIETY FOUNDATION

## **Travel Expenditure Policy**

Adopted: 7/23/2007

Amended: 6/13/2008

Amended: 9/29/2010

Amended: Name Change, 1/2/2012

Amended: 4/4/2014

Amended: 10/21/2016

## **Definitions:**

1. "Designated city area," an area extending five miles beyond the municipal boundaries of Pierre, Sioux Falls, Aberdeen, Watertown, Brookings, and Rapid City;
2. "Direct route," the shortest practical route of travel between two points as determined by the official state mileage chart dated September, 1976, for in-state travel or the current **Rand McNally Road Atlas** mileage chart for out-of-state travel or as determined by standard map mileage for points not identified on the mileage charts;
3. "Employee/Consultant" an individual employed with the South Dakota Historical Society Foundation or contracted to complete work on behalf of the Historical Society Foundation, and or an individual employed with the South Dakota State Historical Society but completing work associated with one of the accounts of the South Dakota Historical Society Foundation.
4. "Indirect route," a route of travel between two points, which includes points not on the shortest practical route of travel;
5. "In-state travel," all official Foundation travel within South Dakota;
6. "Interrupted travel," additional travel for personal reasons that is not a necessary part of official travel;
7. "Interview expense," lodging, meals, transportation, and any other expenses necessary to reimburse a prospective employee/consultant for travel from the prospective employee/consultant's home to the location of an interview for employment by the South Dakota Historical Society Foundation. The term does not include any expenses incurred by the spouse of the prospective employee/consultant.
8. "Out-of-state travel," all official Foundation travel with a destination outside South Dakota;
9. "Post of duty," the location where an employee/consultant is permanently assigned for work and permanently resides.
10. "Signature," an original handwritten signature, not a stamp or mechanical duplication;
11. "Standard map mileage," mileage listed on the current official South Dakota state highway map published by the state Department of Transportation.

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12. "Transportation expenses," the costs of all necessary official travel on regular commercial airliners, chartered aircraft, privately owned motor vehicles, railroads, buses, and other usual means of conveyance, including fares and such expenses incidental to travel while on Foundation business as baggage transfer fees, tolls, and taxicab fares.

## General Provisions:

**1. Allowance for use of privately owned motor vehicle.** In lieu of actual transportation expenses, an employee/consultant shall be paid **at the IRS-approved mileage reimbursement rate** for use of a privately owned motor vehicle on official business outside the city limits of the employee/consultant's designated post of duty. The mileage rate covers all expenses incidental to the operation of a motor vehicle, including gasoline, oil, tires, repairs, towing, and insurance. The Chairperson of the Board of Directors or President may approve the use of a rental car for use in lieu of mileage so long as the rental cost is advantageous to the Foundation.

**2. Reimbursement at higher rates.** An employee/consultant may be reimbursed at higher rates than the applicable out-of-state or in-state rates for travel, lodging, or meals if the **Chair or President** determines that the higher rates would result in a savings to the South Dakota Historical Society Foundation. Prior approval of travel expenses by the **Chair or President** is required if an employee/consultant is to be reimbursed at higher rates.

**3. Computation of Mileage:** The mileage computation shall be the actual mileage provided by the computation of the direct rate mileage plus the business mileage in a designated city area (if applicable) less the mileage for interrupted and/or personal travel. If an employee/consultant for his or her own convenience, travels by an indirect route or interrupts travel by a direct route, the extra mileage amount shall be borne by the employee/consultant.

**4. Registration fees allowable expense.** Registration fees for meetings shall constitute a reimbursable expense if the employee/consultant was authorized by the President to attend on behalf of South Dakota Historical Society Foundation. If meals are included in the registration fee, the employee/consultant may not be reimbursed for the meal allowances for those meals paid through the registration fee.

## **In-State Travel Rates:**

**1. Lodging Reimbursement Rate:** An employee/consultant shall request a "nonprofit rate", state rate (currently \$55 or \$70 depending on the time of year), government rate or "corporate" rate. The Historical Society Foundation will reimburse the actual cost of lodging up to a maximum of **\$125** plus tax a day. An employee/consultant will not be reimbursed for a failure to cancel a reservation.

**2. Meal allowance Reimbursement Rate:** An allowance for meals while traveling within the state of South Dakota is a maximum of **\$35** per day.

**3. Other Meals:** An employee/consultant may purchase meals for others, when in the judgment of the employee/consultant, it is a business meeting and conducting the work of the Historical Society Foundation with the guest. When meals for guests are involved, the allowance for meals may be waived if the employee/consultant provides receipts and the names of the guests shall be placed on the receipt along with the purpose of the meeting.

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## **Out-of-State Travel Rates:**

- 1. Lodging Reimbursement Rate:** An employee/consultant shall request a “nonprofit”, government rate, or “corporate” rate. The Historical Society Foundation will reimburse the actual cost of lodging up to a maximum of \$150 plus tax a day. An employee/consultant will not be reimbursed for a failure to cancel a reservation.
- 2. Meal allowance Reimbursement Rate:** An allowance for meals while traveling outside the state of South Dakota is a maximum of **\$50** per day.
- 3. Mileage Allowance for Out of State:** An employee/consultant driving a privately owned or leased automobile out of state shall be paid **at the IRS-approved mileage reimbursement rate** for the use of the vehicle and also be allowed meals and lodging up to a maximum of two days each way for travel between the post of duty and the business destination. Allowable mileage, meals, lodging shall not exceed the cost of the most economical commercial airfare available per person traveling.
- 4. Air Travel:** Air travel (commercial airliners or chartered aircraft) rates shall be on the class available that is most economical to the Historical Society Foundation.

## **Reimbursement**

- 1. Claims for Reimbursement:** All claims for reimbursement of traveling expenses while on official South Dakota Historical Society Foundation business shall be submitted on forms provided by the South Dakota Historical Society Foundation, itemized in accordance with these policies, signed by the employee/consultant, and approved by the **Chair or President**. Original copies of receipts of expenditures shall be submitted with claims for reimbursement, except for the allowance of meals.
- 2. Credit Card Payments:** All payments made on the South Dakota Historical Society Foundation credit card shall be for official business purposes only. Whenever possible, an employee shall use the credit card for lodging expenses and meal expenses involving guests. An employee shall provide original receipts for all charges on the credit card with information requested in these policies.

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## TRAVEL REIMBURSEMENT FORM

Date: \_\_\_\_\_

Employee/Consultant Name: \_\_\_\_\_

Social Security or Tax ID #: \_\_\_\_\_

Date and Time Travel Began: \_\_\_\_\_

Date and Time Travel Ended: \_\_\_\_\_

Beginning Destination:

Communities Visited: \_\_\_\_\_  
(If more than one city please include all communities, i.e. Spearfish-Rapid City-Lead)

Ending Destination: \_\_\_\_\_

Purpose of Travel:

\_\_\_\_\_  
(If attending a conference, the agenda must be attached. If meals are provided as part of the conference registration, they cannot be claimed.)

Auto Miles Claimed: \_\_\_\_\_ x .535 (2017 rate) = \$ \_\_\_\_\_

Meals Claimed:

In-State:  
Maximum: \$35 per day

Total In-State Meals \$ \_\_\_\_\_

Out of State Meals  
Maximum: \$50 per day

Total Out-of-State Meals \$ \_\_\_\_\_

Taxis, buses, rental cars, etc. (Receipts must be attached) \$ \_\_\_\_\_

Hotel Expenses \$ \_\_\_\_\_  
(In-state rate up to \$125+ tax, Out of State-up to \$150+ tax)

Total Reimbursement Request \$ \_\_\_\_\_

\_\_\_\_\_  
Employee/Consultant Signature

\_\_\_\_\_  
President / Chair Signature