



American Planning Association
California Chapter

Making Great Communities Happen

APA California Expense Policies

Meetings and Conferences:

The Chapter will pay for the following expenses for Board members attending Board meetings and the annual retreat:

Board Meetings/Retreat: The Chapter pays for the following Board meeting/retreat expenses for Board members: meals provided by APA California for all Board members, and travel expenses such as plane tickets, mileage at the IRS approved mileage rate, cab fares, parking and bridge tolls. The cost of the hotel room for one night for Board members will also be reimbursed if the Board meeting or retreat is held over two days. Expenses are paid upon submission to the Chapter bookkeeper of (paid) receipts or other written documentation of costs incurred.

Board Meetings held at the Annual State Conference: The Chapter pays travel costs for the Board meeting if the Board member's employer does not reimburse conference costs. Travel costs to Board meetings held at the annual conference do not include meals (other than meals related to the Board meeting or conference provided to the entire Board), or lodging for the conference.

The Chapter shall cover the cost of one night at the conference hotel for voting members of the Board who arrive the night prior to the Board meeting in order to arrive prior to the Board meeting's start time; however, Sections are responsible for costs incurred by the Section Directors.

Expense Forms

Member expense forms can be found on the APA CA website at www.apacalifornia.org in the "Board Binder" under "Board Activities". Forms should be submitted to the Chapter bookkeeper within 30 days of the expense. Reimbursements are made during the calendar budget year only. Failure to submit a reimbursement request within the calendar budget year will forfeit the reimbursement unless approved by the VP of Administration and/or the Board. Completed forms should be emailed to Laura Dee simplybookkeepingpro@outlook.com.

Elected and Appointed Positions

The Chapter pays for the following specific additional expenses for Board positions depending on the position and the budget allocated to that position for that year. (Please refer to APA Budget for actual budgeted amounts for line items relating to your portfolio).

President: Expenses and travel costs incurred by the President to attend Section Board meetings, meet with affiliated organizations or pay for expenses related to special programs or projects. (Line Item 200) Travel costs and expenses incurred by the President or his/her designee to attend two National APA Chapter President Council meetings per year, including National conference fees, travel and meal costs, and hotel accommodations. (Line Item 201)

President-Elect/Past President: Costs incurred by the President-Elect or Past President for travel and other miscellaneous expenses. (Line Item 202)

Student Representative: Expenses incurred by the Student Rep for student programs and conference expenses. (Line Item 204)

Legislative Review Teams/VP Operations: Travel costs and expenses incurred by the VP Policy and Legislation and lobbyist to attend Legislative Review Team meetings; expenses incurred for other legislative and policy related meetings, events and programs; mileage reimbursement for Legislative Review Team members attending Legislative Review Team meetings upon written request. (Line Item 302)

National Legislative Representative: Registration and travel costs incurred by the National Legislative Representative to attend the National APA annual conference (if the representative's employer does not pay the cost) and National legislative workshops and conferences. (Line Item 303)

Professional Development Operations: Costs incurred by the VP Professional Development for travel and other miscellaneous expenses (other than costs related to workshop programs). (Line Item 400)

Public Information: Costs incurred by the VP Public Information for travel and other miscellaneous Public Information expenses. (Line Item 501)

Administration: Costs incurred by the VP Administration for travel and other expenses related to administration, including costs to allow VP Administration/State Awards Coordinator to meet once with the Awards Jury to choose award recipients to, including mileage or airfare for jury. (Line Item 600 and 601)

Membership Inclusion Director: Costs incurred by the Membership Inclusion Director to carry out the Membership Inclusion Program. (Line Item 604)

Marketing Director: Costs incurred by the Marketing Director to carry out the Marketing Program. (Line Item 605)

Chapter Historian: Costs incurred by the Chapter Historian for printing, mailing, travel and other expenses incurred to conduct the Chapter Historian program, and to maintain the APA California Archives. (Line Item 900)

Planning Commissioner: Costs Incurred by the Planning Commissioner Representative for expenses incurred in carrying out the duties of the position. (Line Item 10001)

Conferences: Costs incurred by the VP Conferences for printing, mailing, travel and other expenses incurred in carrying out the duties of the position. (Line Item 2002)

Sections: Costs incurred to purchase the most recent version of QuickBooks Pro accounting software and keep the software updated yearly if the Sections do not have the funds to buy the updates. (Line Item 106)

Expense Forms

Member expense forms can be found on the next page and on the APA CA website at www.apacalifornia.org in the "Board Binder" under "Board Activities". Forms should be submitted to the Chapter within 30 days of the expense. Reimbursements are made during the calendar budget year only. Failure to submit a reimbursement request within the calendar budget year will forfeit the reimbursement unless approved by the V.P of Administration and/or the Board. Completed forms and copies of paid receipts should be emailed to the attention of Laura Dee to simplybookkeepingpro@outlook.com or mailed to Laura Dee, Simply Bookkeeping, P.O. Box 1784, Discovery Bay, CA 94505.



AMERICAN PLANNING ASSOCIATION
CALIFORNIA CHAPTER

APA California Expense Claim Form - Please print clearly.

Make check payable to: _____

Mail reimbursement to:

Name: _____

Company: _____

Address: _____

City/Zip Code: _____

DATE OF EXPENSE	DESCRIPTION	AMOUNT	BUDGET LI #
TOTAL			

* Mileage reimbursement rate for 2018 is \$0.53 per mile.

Note: Copies of **PAID** receipts must be attached for all expenses, except mileage. Completed forms and copies of paid receipts should be emailed to the attention of Laura Dee to simplybookkeepingpro@outlook.com or mailed to Laura Dee, Simply Bookkeeping, P.O. Box 1784, Discovery Bay, CA 94505.

PRINT NAME

SIGNATURE

Date

Telephone Number