



OAMR EXPENSE POLICY

Revised & Adopted: April 8, 2008

OBJECTIVE: To provide standards regarding reimbursement of OAMR-related expenses and to provide the OAMR Treasurer guidelines for payment of said expenses.

GENERAL PROVISIONS:

1. All reimbursed expenses are incurred for official OAMR business only.
2. Expenses must be submitted in a reasonable timeframe; generally 90 days from occurrence. Receipts must be accompanied by requests for reimbursement; scanned copies, emailed to the Treasurer, are acceptable.
3. All excess payments or travel advances must be returned in a reasonable timeframe.
4. Vehicle travel reimbursement shall be at the Federal mileage rate.
5. Airfare shall be coach fares.
6. Lodging shall be reimbursed for actual costs, not to exceed single-room rates. Lodging shall include the night prior to the start of the event through the final night of the event, unless otherwise noted.
7. Meals. Actual costs of meals incurred in the course of conducting OAMR business will be reimbursed. Members will consider fiscal responsibility to the organization and use sound judgment when requesting reimbursement. The following guidelines shall apply:
 - a. Gratuities are reimbursable
 - b. Detailed receipts must be provided for all meal reimbursements.
8. Alcoholic beverages will not be paid for or reimbursed by OAMR for any OAMR function. This policy is not meant to limit outside sponsorship or donations for social events.
9. The Treasurer may request review by the President or the Executive Board for reimbursement requests prior to issuing the reimbursement.

POLICY EXCEPTIONS: Expense policy exceptions or approval for expenses in excess of the adopted budget may be made by the Executive Board on a case-by-case basis, to meet OAMR business needs.

APPLICABILITY: This policy applies to all OAMR members and authorized individuals conducting OAMR business.

PAYMENT OF EXPENSES:

- I. CONFERENCE EXPENSES.** The following expenses will be paid for guests attending the Annual Conference:
- A. Complimentary Conference Registration, Annual Academy Registration and all meals:
 - 1. OAMR President
 - B. Complimentary Conference Registration (includes all meals, except as noted):
 - 1. President or designee from other Region IX states (California, Washington, Alaska and Hawaii).
 - 2. Margery Price.
 - 3. Northwest Clerks Institute Director.
 - 4. IIMC Region IX Directors.
 - 5. OAMR 1st Vice-President (Conference Committee Chair).
 - 6. President's Award of Distinction recipient from the previous year's conference.
 - 7. Recorder of the Year recipient from the previous year's conference.
 - C. Complimentary Conference Registration, up to 3 nights lodging and travel to and from the nearest airport to conference center/hotel:
 - 1. IIMC President or designee.
 - D. Honored Guests Dinner:
 - 1. OAMR Executive Board.
 - 2. Out-of-State guests.
 - 3. Active OAMR members who are OAMR Past Presidents.
 - 4. Northwest Clerks Institute Director.
 - 5. Margery Price.
 - E. Up to 4 nights complimentary lodging:
 - 1. Host Recorder (as designated by host region).
 - 2. OAMR President (if not included in facility contract).
 - F. Conference Speakers
 - 1. Conference speaker fees paid shall not exceed the budgeted amount without Board approval. In addition to the fee, conference breakfast or lunch closest to the presentation will be provided.
 - 2. Non-paid speakers may be provided the conference breakfast or lunch closest to the time of the presentation; a gift, not to exceed \$15.00 provided by the Conference Committee; and/or an honorarium not to exceed \$50.00, at the discretion of the Conference Chair.
 - 3. Travel is not normally reimbursed; however vehicle mileage may be reimbursed at the IRS rate, at the discretion of the Conference Committee and if budgeted funds are available.
 - G. Miscellaneous Conference Expenses:
 - 1. Gifts, not to exceed \$40.00:

- a. President or designee from other Region IX states.
 - b. Margery Price.
 - c. Northwest Clerks Institute Director.
 - d. IIMC Region IX Directors.
 - e. IIMC President or designee.
2. Corsages or boutonnieres for the Annual Banquet for all incoming Executive Board members, out-of-state guests, the Host Recorder, Installing Officer and past presidents.
 3. Presentations for Immediate Past President (to be made at the Annual Banquet):
 - a. A gift, not to exceed \$100, selected by the 1st Vice-President.
 - b. President's Plaque.
 4. One (1) complimentary vendor booth for IIMC.
 5. Vendors will receive two tickets to attend the Vendor event.

II. REGION IX DIRECTOR. Expenses for the IIMC Region IX Director, from Oregon, will be paid as follows:

- A. IIMC Annual Conference Expenses
 1. Round-trip airfare.
 2. Hotel accommodations.
- B. In the event there are budgeted funds remaining after the expenses for the Region IX Director to attend the IIMC Annual Conference, the Region IX Director may use those funds as needed for other expenses incurred in her/his duties.
- C. Region IX members pay an annual assessment to fund the travel expenses of the Region IX Directors; therefore, their travel costs to Region IX states are not included in this Policy.

III. OAMR PRESIDENT AND 1ST VICE-PRESIDENT.

- A. OAMR President (or designee):
 1. Region IX states annual conferences (Alaska, California, Hawaii & Washington):
 - a. Round trip airfare.
 - b. Lodging.
 - c. Meals.
 - d. Gifts for incoming and outgoing President of each Association.
 - e. Miscellaneous expenses related to the event.
 2. IIMC Annual Conference:
 - a. Round trip airfare.

- b. Lodging for Conference. Lodging in advance of the conference to attend Academy Sessions or other personal events is not reimbursable.
 - c. Meals.
 - d. Conference registration. (Academy sessions are not reimbursable.)
- B. OAMR 1st Vice-President:
 - 1. IIMC Annual Conference:
 - a. Round trip airfare.
 - b. Lodging for Conference. Lodging in advance of the conference to attend Academy Sessions or other personal events is not reimbursable.
 - c. Meals.

IV. OAMR REGION DIRECTORS.

- A. The annual budget shall provide an allocation for expenses incurred by OAMR Region Directors to facilitate a Region meeting. This allocation will be shared equally among the designated OAMR regions.
- B. Any expenditure over the proportional amount must be pre-approved by the President.

V. COMMITTEE CHAIRS.

- A. The annual budget shall provide an allocation for expenses incurred by OAMR Committee Chairs in the performance of their duties.

VI. OTHER EXPENSES.

- A. Future Conference Site Tours. Expenses incurred by the 2nd Vice-President, or designee, as follows:
 - 1. Transportation.
 - 2. Lodging (if not provided by facility).
 - 3. Meals.
- B. Member consideration. OAMR will send flowers/plant or a donation to a charity of choice, not to exceed \$50, in the event of:
 - 1. Death of an OAMR member or his/her family member.
 - 2. Illness of member.
 - 3. Birth or adoption of a child of a member.
 - 4. Retirement of active OAMR member.