

The Roothbert Fund, Inc.

475 Riverside Drive, Room 1622
New York, NY 10115
phone: 212.870.3116
www.roothbertfund.org

TRAVEL REIMBURSEMENT FORM PLEASE READ TRAVEL REIMBURSEMENT POLICY ON REVERSE

NAME of Traveler (Print)

Address of Traveler:

Purpose of Travel: _____

Dates of Travel ___ / ___ / ___ to ___ / ___ / ___

TRAIN/BUS TICKETS (attach receipts):

Intercity Train _____

Intercity Bus _____

Local commuter train _____

Public transportation (bus, subway) _____

Other _____

TOTAL \$ _____

AUTO MILEAGE:

Outbound From: _____ To: _____

Mileage _____ x Multiplied by 58¢ per mile = \$ _____

Return From: _____ To: _____

Mileage _____ x Multiplied by 58¢ per mile = \$ _____

TOLLS

Highway, bridge and tunnel tolls incurred (attach receipts):

\$ _____ \$ _____ \$ _____ \$ _____

TOTAL TOLLS \$ _____

Signature _____

Date _____

GRAND TOTAL \$ _____

FOR REIMBURSEMENT, please complete and submit this form, along with all necessary receipts, to:
The Roothbert Fund, Inc., 475 Riverside Drive, Room 1622, NY, NY 10115

TRAVEL REIMBURSEMENT POLICY

TRAVEL TO BOARD MEETINGS

Any Roothbert Fellow on grant, and any Officer or Director of the Board of the Roothbert Fund may request reimbursement for travel expenses (other than simple commuting costs) when:

- such travel is required to carry out Fund responsibilities, and
- takes place at the request or upon the approval of the Board of Directors of the Fund

The Fund will reimburse Board members for the cost of travel to or from any meeting of the Board, or any committee meeting of the Board, on which that member may serve.

TRAVEL TO A PENDLE HILL RETREAT

In order to foster the fellowship which is so essential to the Fund's mission, the Fund requires each Roothbert Fellow on grant to attend at least one Pendle Hill Retreat during the first year he or she is on grant. **The Fund will reimburse a Fellow's travel costs incurred the first time that a Fellow attends a Pendle Hill retreat while on grant.** These expenses should not exceed \$250. (Note: The Fund welcomes and encourages Fellows to attend subsequent Pendle Hill Retreats, whether or not the Fellow is currently on grant, and will cover the costs of food and lodging at Pendle Hill. However, he or she is responsible for his or her own travel costs to and from Pendle Hill.)

For the purposes of this Policy, unless otherwise specifically approved by the Board of the Fund or the Executive Committee, the term "cost of travel" shall mean either:

- a. the cost of a round-trip, general admission bus or rail ticket** from the depot nearest the traveler's home or office to the depot nearest the location to which the traveler is required to travel, along with the basic cost of public transportation (not taxicabs) between the bus depot or train station and the ultimate destination of the traveler; or
- b. the cost of mileage and tolls, if the traveler drives an automobile.** The traveler should record the number of miles traveled round trip between the traveler's home (or office) and the traveler's destination and multiply it by the amount per mile allowed by the Internal Revenue Service for business purposes (currently 58¢ per mile), adding this total to the cost of tolls paid during travel. (Note: Incidental miles for side trips or travel while at Pendle Hill are not included.)
- c. the cost of an air ticket,** if such mode of transportation, together with transportation to and from the airport, is cheaper than the above and permission to purchase an air ticket is granted in advance by an officer of the Fund.

The Treasurer of the Fund is entitled to limit any mileage reimbursement above to the mileage between two points as estimated by the Automobile Association of America, or a similar agency. In no event shall the Fund reimburse more than the normal cost of travel from the nearer of the Fellow's permanent address or academic address (as set forth in the records of the Fund) to the final destination.

The following expenses are not eligible for reimbursement under any circumstances:

- a. insurance, car rentals, fuel, parking, food, limousines, gratuities or any other cost associated with transportation not included above.** Use of taxis is only permitted for traveling to and from an airport when purchase of an air ticket has been authorized.
- b. travel by any person accompanying the Fellow to Pendle Hill (unless reimbursement for the travel of such accompanying person is specifically approved by the Board in advance)**

No travel reimbursement will be granted unless it is requested on the attached Travel Reimbursement Form, and is accompanied by receipts for all reimbursable expenses.

The Board of Directors may amend this policy from time to time and shall have full authority to make such exceptions to the same as it, in its sole authority, shall deem necessary or appropriate.

Complete the Travel Reimbursement Form on the reverse side and submit it to the Fund along with all necessary receipts.