



DLC \_\_\_\_\_

# SEIU LOCAL 1000 DLC EXPENSE CLAIM

Name (print) \_\_\_\_\_ Date \_\_\_\_\_

Mailing Address \_\_\_\_\_ City \_\_\_\_\_ Zip \_\_\_\_\_

Email Address: \_\_\_\_\_ Phone: \_\_\_\_\_

Date _____				
Location _____				
Time Depart _____				
Time Return _____				
Activity _____				
Expense _____				
1. Room .....	LODGING	LODGING	LODGING	LODGING
2. Incidentals .....				
3. Breakfast .....	MEALS	MEALS	MEALS	MEALS
4. Lunch .....				
5. Dinner .....				
6. Common Carrier .....	TRAVEL	TRAVEL	TRAVEL	TRAVEL
7. Airporter .....				
8. Personal Car .....				
9. Parking .....				
10. Bridge Tolls .....				
11. Taxi Cabs .....	MISCELLANEOUS	MISCELLANEOUS	MISCELLANEOUS	MISCELLANEOUS
12. Internet/phone .....				
13. Other (explain) .....				
<b>TOTAL</b>				

Date	Item	Comment

I hereby certify that this is a true statement of travel expenses incurred by me in accordance with the current travel policy of SEIU Local 1000 during the period of this claim, that all items shown were for official business of SEIU Local 1000 and that no expenses herein were received or paid from any other source.

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
TITLE

Date Paid \_\_\_\_\_

Check Number \_\_\_\_\_

Expense \_\_\_\_\_

Comment \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Total expenses this page \_\_\_\_\_

Total attached pages \_\_\_\_\_

Grand total expenses \_\_\_\_\_

Less - Travel advances \_\_\_\_\_

Balance Due | Member DLC \_\_\_\_\_

**NOTE:** THIS SECTION FOR ACCOUNTING USE ONLY

APPROVED \_\_\_\_\_



# SEIU LOCAL 1000 DLC Expense Claim Instructions

- General:
- 1) Expense claims must be submitted no later than the calendar month following the time the expenses were incurred.
  - 2) Any expense paid by another claimant shall be noted on the expense claim.
  - 3) Each claimant must sign the certification statement at the right of the claim form.
  - 4) The DLC president must sign in the "Approved" box at the lower right of the claim form. Expense claims for DLC presidents must be approved by the DLC treasurer.
  - 5) Expense claims which are not accompanied by required receipts, authorization sign-in sheets (for meetings) and details will not be paid.
  - 6) The most economical use of DLC funds, consistent with the convenience of the claimant and the schedule of the meeting, shall control.

Date: Indicate each date on which expenses were incurred.

Location: Show the location at which expenses were incurred.

Depart: Show the hour at which you departed for a meeting or other activity.

Return: Show the hour at which you returned from a meeting or other activity.

Activity: Describe the purpose of the expenditures.

- Lodging:
- 1) The regular allowance is up to \$50.00 plus tax per night or the negotiated rate. Lodging other than General Council lodging shall not be allowed if residence is within 40 miles/40 minutes from meeting location. Only actual expense within the above limits is reimbursed, and receipts are required.
  - 2) A maximum \$10.00 may be claimed for incidental expenses incurred during any 24-hour period involving a lodging claim (i.e. per night of travel).

Meals: 1) Meal expenses may be allowed up to the following rates:

Breakfast	Lunch	Dinner
\$10.00	\$11.00	\$19.00

- 2) Breakfast may not be claimed if departure is after or return is prior to 8:00 a.m.  
Lunch may not be claimed if departure is after or return is prior to 12:00 noon.  
Dinner may not be claimed if departure is after or return is prior to 7:00 p.m.
- 3) If meals are claimed for more than one person, show the number of meals claimed and list the names of persons for whom meals are purchased (use comment space at bottom of claim) or attach a sign-in sheet.
- 4) Receipts are required if there is no overnight travel.

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- Travel:
- 1) Indicate the mode of transportation and cost. Common carrier (plane, bus, etc.) is the authorized method of transportation but private automobiles may be authorized if a common carrier is not available, is more costly, or would be unreasonably inconvenient.
  - 2) If private automobile is authorized and used, indicate the number of miles traveled (in the comment space at bottom of claim) and use SEIU Local 1000's allowance of the standard IRS rate (50.0¢ per mile as of July 2010).  
If travel is made in another claimant's automobile, travel expense will be allowed only to one claimant.
  - 3) For mileage claims, indicate the starting and ending address or provide a mapped route printout with a mileage total. This can be obtained from websites such as [maps.google.com](http://maps.google.com), [www.mapquest.com](http://www.mapquest.com) and [maps.yahoo.com](http://maps.yahoo.com).
  - 3) Transportation receipts, when applicable, must be submitted with claim.
  - 4) The most economical use of DLC funds, consistent with the convenience of the claimant and the schedule of the meeting, shall control.

- Misc:
- 1) Taxi fares are authorized only when no other transportation is practical or available, or when the fare for several riders is not more than the Airporter.
  - 2) Long distance telephone charges must identify the date, place and party called. If the call is in excess of \$1.00, vouchers or other supporting evidence must be provided.
  - 3) Parking expenses are reimbursed, but amount in excess of \$5.00 require receipts.
  - 4) Bridge tolls are reimbursed, and no receipts are required.
  - 5) Other actual and necessary expenses of an unusual nature, upon approval of the DLC executive board, may be reimbursed when appropriately recorded and adequately explained.

- Donations:
- 1) Donations are included in non-chargeable expenses which are limited to 10% of budgeted revenue for each year. Non-chargeable expenses are generally discouraged and should be kept to a minimum.
  - 2) All donations must be supported by approval of the DLC executive board. Proper approval includes: (a) confirmation a quorum was present, (b) confirmation a motion was passed, and (c) details of the motion including the organization's name and donation amount.
  - 3) Donations may be made to IRS registered non-profit organizations provided they benefit the community relations of SEIU Local 1000 and are not of a partisan political nature. Qualified tax-exempt organizations should provide an IRS tax exemption letter or a donation letter with their IRS issued non-profit number.

**SEE NEXT PAGE**

- Misc. Purchases: 1) Non-recurring, non-ordinary or unusual expenses exceeding \$500 must be approved by the executive board of the DLC and evidence by meeting minutes (see Donations above for requirements of meeting minutes). The purchases include but are not limited to equipment, t-shirts and SEIU memorabilia.
- Incomplete Claims: 1) Claims missing required receipts, sign-in sheets, explanations, details, approval, etc. may be short paid or returned.
- DLC and Local 1000 Expenses: 1) DLC paid expenses must always be claimed on a DLC Expense Claim form. Local 1000 expenses must always be claimed on a Member Expense Claim form (or Employee Expense Claim form for staff).
- 2) Expenses claimed incorrectly may be delayed or denied reimbursement.
- 3) Questions regarding the division of expenses should be directed to DLC Finance.

**Mail completed, signed, and approved claims to:**

SEIU Local 1000  
DLC Finance  
1808 – 14th Street  
Sacramento, CA 95811

**Contact:**

DLC Finance  
cbrackett@seiu1000.org  
(916) 554-1287