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Revised: 06/14/2023

DEPARTMENT OF PACIFIC AREAS
POLICY MEMORANDUM
FOR

TRAVEL – LODGING – EXPENSE REFRAYMENT

PURPOSE: To establish a uniform policy by which authorized Department of Pacific Areas (hereinafter, DPA) individuals may receive expense defrayment for travel and lodging while performing official DPA functions.

BACKGROUND: The history of expense defrayment for travel and lodging has been established by various motions at Conventions and/or during Council of Administration (hereinafter, Council) meetings. This revision is presented to inform members on the DPA policy for Convention Travel, Council Meetings, and other Commander directed travel.

APPLICABILITY: This policy shall apply to all DPA members entitled to expense defrayment due to authorized travel and lodging as elected, appointed, or directed representatives of the DPA. The following positions within the DPA are authorized expense defrayment for travel and lodging when performing official duties; Commander, Senior Vice Commander, Junior Vice Commander, Quartermaster, Adjutant, Judge Advocate, Chaplain, Surgeon, Immediate Past Department Commander, Service Officer, Inspector, Chief of Staff, District Commanders, Audit Committee members, Deputy or District Inspectors and other members as directed by the Department Commander or governing body.

RESPONSIBILITIES - DEPARTMENT:

A. **Commander-** The Commander shall have governance of the following:

1. Has overall approval authority to ensure all requests for expense defrayment are authorized and is appropriate with this policy memorandum.
2. May direct non-budgeted travel only when it is in the best interest of the DPA.
3. Retains the right to adjust any of this policy if financial circumstances demand.
4. In the absence of the Commander the Senior or Junior Vice Commander will assume the responsibilities of the approving authority.

B. Quartermaster (hereinafter, QM) -The QM shall ensure:

1. All requests for expense defrayment will be reviewed for completeness and is appropriate for reimbursement and documentation.
2. That payments made to authorized members are made in a secure and timely manner.
3. Upon request by claimant that completed copy of the expense claim is returned in kind.

C. Budget Committee - The Budget Committee composed of the QM as Chairman, SVC, JVC and IPDC (the JA may be included for policy guidance) shall be responsible for the following:

1. Budget sufficient funds for line items that require travel and lodging.
2. Update as needed the line items in the budget that require travel and lodging.
3. Make recommendations to the Council for approval on amendments to the Budget concerning any line item as they occur.
4. In coordination with the host District and Post, agree on the hotel room rate for members attending the Convention or Mid-Term meeting.

POLICY: The policies set forth herein shall be adhered to unless circumstances demand as outlined in paragraph A above are encountered and then the Commander shall rule:

A. Travel-

1. Expenses for land and air travel shall be defrayable from the member's home Post location to the event site and back. The exception to this policy is if expected revenue for the budget calls for restraint at the incoming Budget meeting or at other times during the ensuing year, then land and/or air travel expense, or any portion thereof, may not be authorized if so, directed by the Council. Should this occur then notification shall be given by electronic communication to those concerned and shall be indicated on the Form 11.
2. Air travel defrayment will be based on the economy class rate using the most direct route. Travel agency fees WILL NOT be reimbursed. In country air travel may be authorized by the Commander as defined under section on Responsibilities - Department Commander herein. Fees for visas and/or airport taxes will be reimbursed, however, immigration fees based on one's immigration status in the member's country of residence will not be reimbursed.
3. Land travel will be performed by the most economical means consistent with adequate safety and comfort.
4. In event of commercial transportation is use (i.e., taxi, local transport, bus), a receipt is required to be Submitted for reimbursement.
5. Overweight expenses shall be considered for persons carrying supportive records/supplies, Convention books, award plaques or other items that are required for use at the Convention or mid-term by the Department.
6. POV mileage rate shall be at the rate set in accordance with IRS stated allowance for mileage as listed on the expense form.

7. The elected incoming Department Commander, Senior Vice Commander and Junior Vice Commander will be authorized economy airfare to the next National Convention, as well as a stipend equal to that of selected National Committee members.
8. The Department Commander, Senior Vice Commander, Junior Vice Commander will be authorized economy airfare and hotel reimbursement for the Western Conference meeting in the Fall.

B. Lodging -

1. Lodging expense defrayment rate will be based on the number of nights indicated below. The rate shall be based on a standard room rate as set in "Responsibilities", paragraph C.
2. Members electing to stay in other than standard rooms will be required to pay any additional room costs.
3. Members shall stay at the DPA designated hotel to be eligible for expense defrayment. If one hotel cannot accommodate all members eligible for expense defrayment, the Commander shall set a daily lodging expense defrayment rate that applies to all hotels in the event area.
4. Lodging will only be paid for the actual days a member is present, or for the event period, whichever is less. The days authorized for lodging defrayment expenses at the Convention and Mid-Term shall be a minimum of five (5) and two (2) respectfully for members defined under "applicability" above.
5. The DPA Commander's lodging expenses will be defrayed at actual cost for the number of nights in paragraph 4.

C. PDCs - The incoming budget approved by the Council shall reflect how much expense defrayment PDCs are authorized for the ensuing year. Notification shall be made by the Budget Committee Chairman to all concerned PDCs within thirty (30) days of any budget approval if amounts authorized are less than the maximum set below. The following shall apply to all PDCs who do not receive expense defrayment as defined in the above policy in paragraphs **A and B**.

1. Those attending the convention may be authorized a maximum of \$700.00 when traveling from outside the host District.
2. If residing in the host District area and not located in the immediate area of the Convention site the PDC's may be authorize a maximum of \$500.00.
3. PDCs residing in the immediate area of the Convention site shall not receive any expense deferment unless they perform duties listed under the "Applicable" paragraph above.
4. Any PDCs attending the mid-term may receive a maximum of \$500.00 if not living in the immediate area of where the mid-term is held.

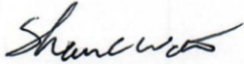
D. Audit Committee - The Department By-Laws stipulate an audit annually, therefore, the Audit Committee shall be reimbursed only for expense defrayment for the annual Department audit. If special audits are directed by the Commander or Council, the expense defrayment shall be considered by the Budget Committee and presented to the Council for approval. The Audit Committee Chairman shall be authorized reimbursement for travel and lodging to the Mid-term C of A.

- E. **Other Members:** Are those who may be members representing excused Council members, Deputy Inspectors and Assistants, Sgt at Arms or Officer of the Day as well as other members directed by the Department Commander or governing body. They shall be governed by this policy for expenses incurred in performing their duties.
- F. **DPA Form-11 (See attached form for reference.)** -The DPA Form-11 (hereinafter, form) is the official form that is used for defrayment expenses is available on the Department website. The following are specifics:
1. **Scheduled Events** -At scheduled events such as the Convention and Mid-Term, officers shall complete and return a signed form by hand delivery, postal mail, or email with attached PDF file to QM in order to receive payment in a timely manner prior, at, or after an event.
 2. **Payment Method** - The QM shall normally remit money requests by check, however, electronic transfer may be used with a U.S. financial institution (Bank/Credit Union). When requesting payment by electronic transfer it should be indicated in the remarks area of the form; 1) financial institution name, 2) name on account, 3) routing number, and 4) banking account number. (Note: Routing number can be found at bottom of a check from your financial institution. It is always the first nine (9) numbers indicated at the bottom left-hand side of a check.)
 3. **Advance Defraval** - If circumstances dictate the Department Commander may authorize advance payment for air travel providing it is requested and indicated on the form. If the claimant does not show up for the event a refund of moneys shall be rendered in kind back to the Department.
 4. **Other Members** -Those other members referenced in paragraph E. to this policy shall utilize the form and submit by hand delivery, postal mail or email with attached form signed in PDF file to the QM.
 5. **Receipts or Certification** - When filling out the form, the applicant shall provide proper receipts or certification of the expenses incurred and attach to the form.
 6. **Money Rate** - Money rate conversion to dollars may be provided by the applicant for the country of departure, however, the QM reserves the right to make final determination of rates for both departure and host countries based on international rates at time of form submission.

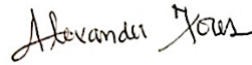
APPROVAL: This Policy Memorandum for Travel -Lodging-Expense Defrayment shall be effective upon approval of the Department Convention or Council. It shall be a standing policy that may be amended or revised by majority vote of the Convention or by the Council.

This Policy Memorandum for Travel – Lodging – Expense Defrayment as revised was approved by the Department Council on June 14 2023.

Official:



Shawn Watson
Adjutant, DPA



Alexander Fores
Commander, DPA

One Attachment: DPA Form – 11

Cc: DPA Convention
File



DPA Form-11
TRAVEL/EXPENSE REIMBURSEMENT REQUEST
Convention, Mid-Term or Other

Name: _____ Address: _____

Phone: _____ E-mail: _____

Post No: _____ District: _____

Department Position: _____

Item	Details	Amount Claimed	Amount Paid
* R/T Air Fare	From: _____ To: _____	\$ _____	\$ _____
Inland Transport		\$ _____	\$ _____
Departure Tax	Country of Departure: _____	\$ _____	\$ _____
Departure Tax	Country of Meeting: _____	\$ _____	\$ _____
Hotel Charges		\$ _____	\$ _____
** Other	Specify: _____	\$ _____	\$ _____
Total Claim		\$ _____	\$ _____

* Copy of actual ticket and credit card or travel agent receipt required.

** Attach evidence or signed statement.

Preferred Method of Reimbursement: Check Direct Deposit

Name of Bank/ Credit Union:	Routing No.
Name on Account:	Account No.

INFORMATION REQUIRED FOR ELECTRONIC TRANSFER

Claimants Signature: _____ Date: _____

For DPA QM Use Only:

Date Paid: _____ Amount: _____ Check or Voucher No. _____

DPA QM: _____ (NAME) _____ (SIGNATURE)