

Representative Travel Guidelines

(DRAFT 4)

These are the guidelines for representative travel money disbursement, which are intended for use by the YM representatives to other organizations and the YM assistant clerk.

Summary of Guidelines for Representatives

The assistant clerk oversees the disbursement of travel funds.

Any official representative may request travel money from SEYM. However, not all travel can be fully covered by the Yearly Meeting. When more travel money is requested than is available, the assistant clerk will prioritize and pro-rate the disbursements, considering guidelines set by the Yearly Meeting.

The responsibilities of the representatives with respect to obtaining travel money are:

- Make requests for travel money to the assistant clerk

- Submit receipts to the SEYM administrative secretary

- Report to the Yearly Meeting

Complete Guidelines for Assistant Clerk and Representatives

The assistant clerk oversees the disbursement of travel funds for Yearly Meeting representatives to other organizations. He or she should also maintain contact with all of the representatives and provide nurture and counsel to them.

The Yearly Meeting General Fund allocates two budget lines for representative travel monies, designated for annual travel and triennial travel.

The triennial travel money is specifically designated for travel by representatives to triennial functions, especially the FWCC and FUM triennial meetings. If there is unused budgeted triennial travel money left at the end of the fiscal year, it is carried over to the next fiscal year.

The annual travel money is designated for travel by any designated and approved representative of SEYM to another organization. This includes travel by the FWCC and FUM representatives to meetings other than the triennial meetings. Annual travel money is budgeted for one year only. If unused, it does not carry over.

The assistant clerk should contact each SEYM representative at least once per fiscal year to do the following.

- Determine whether the representative expects to travel to any meetings during the year

- Find out whether the representative will request travel money

- Discuss the travel money disbursement policies with the representative

- Find out whether the representative has any concerns about the organization he/she is representative to or his/her ability to represent the YM. Attempt to resolve problems or bring them to the attention of the Yearly Meeting.

- Provide other assistance to the representative as needed

- Remind the representative that she/he should make a report to the YM

Any official representative of the YM may request travel money for travel to official meetings of the organization he/she is a representative to. The request is submitted to the assistant clerk, who may approve the request depending on the availability of travel money and the needs of all the representatives.

Representatives should also request assistance from their home meetings. The ideal sharing of the cost is 1/3 from the YM, 1/3 from the home meeting and 1/3 from the individual, but this standard formula need not be followed in all cases. There will be circumstances, such as very expensive trips, local meetings that have several representatives, etc. when the YM will need to cover a larger share of the expense. Representatives are encouraged to ask for what they need.

A representative who wants to request travel funding should contact the assistant clerk with the request, including an approximate amount, before the trip. He/she should contact the assistant clerk with the final amount after the trip. The assistant clerk approves disbursement by notifying the representative and the YM secretary. The representative sends the secretary receipts for expenses. The secretary sends the representative a check and notifies the assistant clerk that the representative has been paid. The representative may also request some or all of the travel money disbursement before the trip is made, if needed. The representative should request disbursement of travel money during the fiscal year in which the trip is made. (The SEYM fiscal year runs from June 1 through May 31).

The assistant clerk may, at his/her discretion, approve travel money for any official representative, within the constraints of the available travel money. If there are more requests than there is money available, then the assistant clerk should prioritize and pro-rate the disbursements, using the following guidelines as well as his/her own best judgement and knowledge of individual circumstances.

Travel to meetings of organizations' governing boards, on which the representatives sit, have the highest priority

Travel by each representative to one official meeting per year of the organization he/she is a representative to is prioritized above additional trips by any representative in the same fiscal year.

Travel to regular business meetings of the organizations has priority over travel to other meetings such as consultations, symposiums, etc.

If one trip combines both a business meeting and personal enrichment or leisure, then the expenses should be pro-rated so that the Yearly Meeting contributes an appropriate amount for the business portion of the trip.

The Yearly Meeting also receives requests for travel assistance for purposes such as sending someone to a youth gathering, for which there is no approved YM representative. If someone is approved at Gathering or a RM as a representative to a particular one-time meeting during the year, then that person is considered as an official representative of the YM and may request travel money. Such a request will be considered by the assistant clerk along with all other requests from official representatives. If a situation arises when there is no opportunity for action by the YM before the event, the request should be referred to the Executive Committee, with a recommendation from the Assistant Clerk. The EC may decide whether to grant travel assistance and determine what budget category to take it out of.

Each official representative of SEYM (whether or not he/she requests travel money) and anyone else who receives travel assistance from the Yearly Meeting should report to the YM regarding their trips or other forms of representation. There are several ways of reporting. The following are preferred, because they reach the most people:

an article in the SEYM newsletter

a special interest session at the Gathering

a written report in the Documents in Advance for the Gathering

a (succinct) verbal report in a plenary session at Gathering

Other ways of reporting are a written report in the DIA for a RM or a verbal report at RM, an article on the SEYM website or the SEYM Peace web site.