

Carleton College Statement of Volunteer Expenses

Please submit this form along with original supporting documents and receipts to the sponsoring office within 30 days after the date of the meeting for which the expenses were incurred. See reverse side for the College's expense policy.

Please Print Clearly

Name _____ Class _____

Address _____

City _____ State _____ Zip _____

Daytime Phone _____ Evening Phone _____

E-mail Address _____

Report of Expenses for _____
(meeting name and dates)

Eligible Expenses:

a. _____ miles in a personal vehicle @ \$0.14 per mile = \$ _____

b. Transportation between MSP Airport and Northfield (up to \$100) = \$ _____

c. Airfare = \$ _____

d. Lodging = \$ _____

Total Expenses = \$ _____

The IRS requires that ORIGINAL supporting documents/receipts be attached. Faxed or e-mailed receipts are not acceptable.

In accordance with Carleton College Policy, volunteers may receive a letter from the college to document your volunteer expenses and/or reimbursement for expenses incurred while conducting College business. While volunteers are strongly encouraged to contribute their expenses, the College does not wish to limit the participation of any volunteer because of financial restriction.

Expenses incurred only by volunteers are reimbursable. Please check an option below:

(For both a partial reimbursement and a donation, please write the percentage you would like for each on the line before each option)

_____ **Reimbursement** - For reimbursement of your expenses, please submit your request (with receipts) within 30 days, initial here _____ and sign below. You must also submit a completed and signed IRS W-9 form.

_____ **Donation** - To receive a letter from the College to document your volunteer expenses, please initial here _____ and sign below. Donated expenses do not require a receipt for Carleton, but you may wish to keep them in your tax files. Please note that the choice of an expense letter will result in a charitable contribution to the full extent allowed under current federal income tax law.

Date _____ Signed _____

Carleton College Volunteer Expense Policy

In accordance with Carleton College policy, volunteers may receive reimbursement of expenses incurred while conducting College business. Beginning in fiscal year 2017-18, we will encourage volunteers to submit their travel expenses either for reimbursement or to receive a letter from the College that they can use for tax purposes. We will no longer be transferring the equivalent of those expenses from the AAF/Alumni Relations office budgets to the AAF for individual gift credit.

Volunteers are strongly encouraged to contribute their expenses. However, the College does not wish to limit the participation of any volunteer because of financial restrictions. Alumni engagement is important to the College. Our goal is to ensure that all volunteers can participate, not necessarily to cover all the costs associated with attendance. Please note that you will need to pay up front for your associated travel expenses.

You may be reimbursed for the following expenses:

- Air Travel: The cost of your three-week advance-purchase round-trip coach airfare. We encourage you to purchase the lowest available airfare from your home city. We have a general guideline cap of \$400 for fares, but recognize that from some cities' fares may be higher. Contact staff if you have any questions.
- Transportation between the Minneapolis/St. Paul airport and campus: Round-trip cost of transportation, up to \$100. We encourage volunteers to carpool when possible.
- Car Travel: Mileage between your home and campus at 14 cents per mile (the IRS approved rate for volunteers), or the cost of a three-week advance-purchase round-trip coach airfare, whichever is less.

The following are considered ineligible expenses for reimbursement. However, you may be able to deduct these types of expenses on your taxes:

- Travel to/from the airport from your home; airport parking
- Lodging en route to a meeting (if you drive long-distance to campus)
- Food and beverages en route, or other than those provided during the business portion of the on-campus meeting
- Airline fees for checked baggage
- Mileage, if you've rented a car (mileage is included in the cost of the rental)
- Care arrangements for children or pets; gifts for hosts (e.g., if you stay with friends or relatives)

Please note that the IRS requires original receipts for all expenses for the College to be able to process a reimbursement. Unfortunately, this means that faxed or emailed copies of receipts are not sufficient. We would appreciate receiving your expense statement within 30 days.

Please contact the Alumni Relations office at alumni-office@carleton.edu or 800-729-2586 with any questions about this policy. We're grateful for the time you commit to supporting Carleton!

FOR OFFICE USE ONLY

To: Business Office

Date: _____

From: _____

Account Number: _____

- The amount \$ _____ is authorized to be charged to above account payable to this volunteer.

Staff Signature _____

Date _____

Updated August 2017