

## AMTA Michigan Revised Financial Policy

February 1, 2020

This policy went into effect beginning Saturday, September 21, 2019, and was amended during a chapter board meeting on February 1, 2020 and was voted on by the AMTA Michigan board following recommendations of the Financial Committee composed of:

- Carrie Mayo Buechler, Financial Administrator
- Hal Pape, Member
- Susan Gamalski, Member
- Wendy Woerner, Member

The following information is to be used to determine allocation of funds during the annual budget meeting. All expenses are based on the premise that sufficient funds are/will be available. Any adjustments must be approved by a majority of the Chapter Board.

### **Reimbursement Amounts**

The following defines each of the categories and the amounts covered (any exceptions will be noted).

#### Transportation

Includes airfare/train/bus (100%) or mileage (50% of GSA), tolls, parking, shuttle/taxi/Ridesharing from site to site which includes events and local area travel for meals.

No baggage fees are covered

#### Hotel

Shared room split as 50% coverage per volunteer except where noted

#### Meals (for out-of-state activities)

50% of GSA including travel days.

#### Payment/Reimbursement

All the above should be submitted within 30 days of occurrence, or within 90 days maximum.

Receipts are to be attached to RFP and forwarded to Michigan Chapter Financial Administrator [amta.mi.fa@gmail.com](mailto:amta.mi.fa@gmail.com) **and to** Chapter Accounting [chapteraccounting@amtamassage.org](mailto:chapteraccounting@amtamassage.org)

Mileage is to be calculated via Google/Bing maps with exact itinerary included from home to site and reverse. Include the link in your documentation.

If a per diem rate is agreed upon for Meal Allowance, no receipts are needed.

If any volunteer is active in more than one position, their reimbursement will be given for a single position.

If you have questions about any of the reimbursements, please speak to the Chapter FA before submission.

## AMTA Michigan Revised Financial Policy

February 1, 2020

### Convention Coverage

Expenses for the entire board will be covered for convention as well as those for Delegate(s) and Chapter Meritorious per the amounts/percentages noted below. No classes or convention registration will be covered; instead an exhibit hall pass will be issued.

Expenses for Committee Chairs will only be covered for those instances in which activity at convention will benefit the committee work.

CVOP is in the process of changing content due to the implementation of Chapter Advancement Initiative (CAI). Each year the board will determine which volunteers will benefit from attending and allocate funds accordingly.

<b>Convention Expenses</b>	Attend	# of nights	Transportation	Hotel Full/Split	Meals	Hall Pass
President	Yes	5	Yes	Full	50%	Yes
Board Members (2)	Yes	5	Yes	Split	50%	Yes
Financial Admin.	Yes	5	Yes	Split	50%	Yes
Secretary	Yes	5	Yes	Split	50%	Yes
Delegates (2)	Yes	2	Yes	Split	50%	Yes
Chapter Meritorious	Yes	2	Yes	Full	50%	Yes
Committee Chairs	TBD	TBD	TBD	TBD	TBD	TBD

All chapter volunteers in attendance must attend Chapter Leadership and the Opening Session. Board Members must attend opening, keynote(s), and closing sessions. In addition, Dinner Dance attendance is required for Board Members and tickets will be purchased for them if needed.

### June Meeting Coverage

The amounts allocated and the volunteers chosen to attend this event in Evanston will be determined during budget meetings once the topics and agenda have been chosen. Since this is an expansion of the Presidents Meeting, the chapter president (or his/her representative) will also be covered.

## AMTA Michigan Revised Financial Policy

February 1, 2020

### Additional Chapter Events (Spring/Fall Classes), Board Meetings, CAI and Leadership Trainings

Board meetings are now scheduled for the evening before the start of education events. Hotel and meals will be covered for the entire board. No transportation expenses will be reimbursed.

All board members should attend both Spring and Fall Education Events. Hotel and meals will be covered for the entire board. No transportation expenses will be reimbursed. If they are working/volunteering/assisting with the event, they may attend classes at no charge. The Education Committee Chair will not be charged registration for any education event.

Delegates should attend Annual Meeting during Spring Event and provide a brief report. Committee Chairs are encouraged to attend Annual Meeting and provide a brief report. Any and all expenses covered for Delegates and Committee Chairs will be identified annually during the budget meeting.

A determination will be made before every Spring and Fall Event as to how many volunteers are needed. Depending on their participation and assistance, a reduction in the class fee may be offered. The amount of reduction is to be determined in advance by recommendations from the Education Committee with approval by the Board.

Past presidents may receive free tuition to education events excluding any fees or supply costs. They are to contact Chapter President before the end of the Early Bird Registration date and if space is still available their registration will be confirmed.

A certificate of attendance from the instructor will only be issued for those volunteers who meet the attendance requirements, and not just sitting on the sidelines observing.

<b>Additional Events (Education, Training)</b>	Attend	# of nights	Transportation	Hotel Full/Split	Meals (beyond attendee offerings)
President	Yes	3	No	Full	Yes
Board Members (2)	Yes	3	No	Split	Yes
Financial Admin.	Yes	3	No	Split	Yes
Secretary	Yes	3	No	Split	Yes
Delegates (2)	Annual Meeting	TBD	No	TBD	No
Committee Chairs	Annual Meeting	TBD	No	TBD	No

All volunteers are to attend the CAI Training and any similar offerings. Based on location and method (face-to-face or virtual), a determination of expenses covered (hotel, meals) will be made during budget meeting. There should be no cost for any volunteer to attend.

## AMTA Michigan Revised Financial Policy

February 1, 2020

### **Additional Budget Considerations**

In 2019, a Dolly Wallace Professional Membership Scholarship was started for one Michigan Member to receive Registration and 2 nights hotel at no charge for the Spring Education Event. No transportation or additional expenses are covered. Transportation, hotel, registration and meals were provided to Dolly Wallace to attend and hand out the award. A determination will be made annually to determine if funding is available for this to continue.

In the past, it was mandated that all active volunteers were required to submit an article for the newsletter. Due to the redesign of the newsletter, this is no longer always feasible. Alternate and appropriate activities will be discussed during board and budget meetings and chosen for their ability to provide information to the members.

Chapter Ambassador is part of the Membership Committee budget. It allows for the Chapter President or other chosen Board Member to travel to different locales to meet with members who aren't close to scheduled events or who request a meeting/meet-up or who have never met with any AMTA member! Round-trip Mileage (50% of GSA), 1-night hotel and \$25 meal allowance are allotted for each locale. A maximum amount will be determined annually once sites have been chosen.

Approved this 21<sup>st</sup> of September 2019

Modified and approved this 1<sup>st</sup> of February 2020.

Carrie Mayo Buechler, Financial Administrator

Kathy Paholsky, President

Cindy Dort, Board Member

Jessica Carter, Board Member

Corey Rivera, Secretary