

NJCPA Leadership Reimbursement Policy *(revised September 2016)*

Recognition gifts: The NJCPA gives several recognition gifts to members holding leadership positions at the end of each term.

At the state-level, framed testimonials will be given to the outgoing President and Executive Committee members. In addition, the President will receive a personal gift. Outgoing members of the Board of Trustees, chapter presidents, committee chairs and group leaders will receive an unframed testimonial.

At the chapter level, recognition gifts are to be given in accordance with the following guidelines:

- Leaders other than president – not to exceed \$25
- Outgoing president (if chapter gives annual gifts) – not to exceed \$150
- Outgoing president (if chapter does not give annual gifts) – not to exceed \$500

Travel to the In-State Convention: The NJCPA will pay for the conference registration and related hotel room if a leader is required to attend and the leader takes the specified leadership program as determined by the Board of Trustees. If the leader can't make it for the entire conference, a pro-rated portion of the registration will be paid.

Related-Conference Attendance: The NJCPA realizes that other organizations (for example, but not limited to, the AICPA) may hold conferences where it is important for a representative of the NJCPA to attend. These are conferences that provide valuable information that support a committee/group's objectives. These conferences may take place outside of New Jersey and require an overnight stay. Related expenses will be reimbursed within the following parameters:

1. Reimbursement is limited to reasonable transportation and lodging.
2. The following will not be reimbursed: Conference registration fees, meals, phone calls, internet connection, or entertainment.
3. The reimbursement is limited to \$1,500.
4. The same person cannot be reimbursed for more than two consecutive years.
5. A report, oral or written, on the conference must be presented to the group/committee.

Reimbursement of the above expenses is limited to one conference per committee per year. In those rare cases where it may be necessary to have a committee representative at an additional conference the committee may submit a special request for reimbursement prior to the conference.

Other Travel: It is recommended that, other than those listed above, there be no reimbursements, mileage or otherwise, to members attending NJCPA events. The Executive Committee can make exceptions to this policy.

Social Events: It is NJCPA policy that any social function open to members be held at a financial break-even. This policy should be continued. A few Chapters hold social events that are by invitation only. While it is important to recognize the value of the networking and goodwill that these events bring, the cost must be contained to a reasonable amount. It is recommended that these events be limited to an annual cost of \$40 per leader in attendance. Spouses and guests should pay for the event at cost.

Chapter Board and Interest Group/Committee meetings: Expenses to conduct meetings for the Board of Directors should be kept to a minimum. Recognizing that both the size of boards and the frequency of meetings differ among chapters, no maximum dollar amount is specified.

Rather chapters should seek to keep these costs low by holding meetings immediately preceding a chapter event or holding them as breakfast meetings. Dinner meetings should be avoided.

Interest Group and Committee leaders may request that food be provided at an extended meeting that will take place over lunch or dinner.

CPE: Chapter and committee members who are part of the CPE program planning committee are permitted to attend the session free of charge. Members who are not part of the program committee are expected to pay for the event.
