Practice Discipleship Coach Expense Form Instructions

It is the desire of the ELCA Youth Ministry Network to financially support reasonable and necessary expenses for the ministry of Practice Discipleship in synods. Please consider how you might be good stewards of the amount budgeted for your synod, and how your synod might also invest in this ministry.

Below is a summary of expenses that will be covered and how to request reimbursement. If you have a request for an expense not listed, it is best to seek approval prior to the expense to make sure it is covered. Please contact your assigned Head Coach if you have any questions.

Reasonable and Necessary Expenses:
1. It is up to the discretion of the Practice Discipleship Team and the ELCA Youth Ministry Director to determine if an expense is reasonable and necessary.
2. “Reasonable” is deemed to mean efforts to practice good stewardship and conservation of financial resources of this church. Please be cautious about all expenditures, avoid the appearance of extravagance, and do not indulge in spending inappropriate for the work, programs, and activities of Practice Discipleship.
3. “Necessary” involves legitimate charges that arise from the work, programs, and activities of Practice Discipleship. Use good, cautious, common sense.

Receipts:
1. Receipts for all charges (except reasonable amounts for gratuities) must be sent along with the signed expense report to the address listed above.
2. Only original receipts can be accepted for reimbursement.
3. For receipts from meals: a detailed receipt of your meal order is required (vs. a receipt only showing the credit card charge). Alcoholic beverages will not be reimbursed.

Timely Filing:
1. Expense reports should be submitted for reimbursement within 30 days.
2. Reimbursement cannot be guaranteed for expenses incurred more than 90 days before submission of an expense report form.

Meals:
A traveler for Practice Discipleship purposes will be reimbursed for reasonable expenses for three meals per day. The ELCA Youth Ministry Network guideline is $40 per day. Tips of more than 15% may not be approved. The names of all those who attended the meal must be written on the back of the receipt. The ELCA Youth Ministry Network will not reimburse charges for alcohol.

Mileage:
Mileage is charged at the IRS charitable mileage rate at the time of travel. Current rate is $0.14 per mile.
**Personal Car/Rental Car/Airline Travel:**
The expectation for Practice Discipleship Coaches is that most travel will be expensed as car mileage. In some cases, a rental car/gas is the most economical option. For synods with a larger geographic area where air travel might be the more reasonable and economic option. **Airline tickets must be pre-approved.**

**Expense Form Details:**
1. Expense reports can be found on the PD2 Coaches website: 
   [www.elcaymnet.org/PD2Coaches](http://www.elcaymnet.org/PD2Coaches)
2. This is a fillable form. Once downloaded you can type in your answers, print, sign and send. Or you can print and fill in by hand.
3. **Region/Synod.** Please include the number of your region and letter for your synod. For example: 3E
4. **Pay To:** Expense forms should be filled out and signed by the person requesting the reimbursement. If the expense was paid by your synod, enter the synod name and the PD Coach signs the form.
5. **Date of Trainings/Meeting/Event:** List the date(s) in which the expenses took place.
6. **Purpose and Location:** List the purpose of the expenses (e.g., PD Training event) and the location if applicable.
7. **Receipts:** Use one line for each receipt you are submitting. Include:
   a. Date
   b. Vendor (where the receipt is from)
   c. Receipt Description. Use the general descriptions listed (transportation, hospitality, administrative expenses, other). If other, include a brief description. If a receipt includes more than one type of expense, list the one with the most expense. The purpose of this is to help us track what kind of expenses PD incurs in synods.
   d. Receipt Total. If you are not requesting full reimbursement for the receipt amount (due to personal expenses, etc), only write in the amount you are requesting for reimbursement. Be sure to re-calculate any tax.
8. **Mileage:** Enter the mileage driven on each date. You must include a Google Map (or similar) that shows the starting destination, end destination, and miles driven. If the actual miles do not match the miles shown on this map, include an explanation. (ex. Detour for road construction, etc) Use the current IRS charitable mileage rate ($0.14 per mile).
9. **Totals:** Enter and add your total receipt and mileage expenses.
10. **Signature:** The person who is requesting reimbursement must sign the form. If the check is to be made out to the synod, the PD Coach should sign the form.
11. **Include:**
   a. Original Receipts for all receipts listed.
   b. Map showing mileage for any mileage requested.
12. Please mail the expense reports to: Catherine Anderson
    Attn: PD Expenses
    Northeastern Minnesota Synod
    1105 E. Superior St., Upper Suite
    Duluth, MN 55802
Practice Discipleship Synod Budget and Allowed Expenses

- Each synod is budgeted $1000 for expenses occurring January 1, 2013 – January 27, 2014
- Expenses cannot be carried over to the next budget period.
- Expenses incurred before June 30, 2013 must be received no later than July 31, 2013 to be reimbursed.
- A very limited amount of additional funds is available upon request. Priority for these funds will be given to cover transportation costs for synods with a large geographic area in which to travel to training events. **Pre-approval is required.**

To help make the most of your available funds:
- This is a ministry of your synod. Encourage your synod to financially invest in the trainings to increase ownership.
- Consider asking strategic partners to partner in some of these expenses.
  - For strategic partners (like outdoor ministry), training events can be a promotion tool for their ministry.
- Consider other sources of funding
  - Thrivent (if not funds, napkins or other supplies?)
  - Synod Conferences
  - Synod Foundations
- Create a budget plan to allocate your funds to cover all trainings you are expected to provide. Plan ahead so you don’t run out before the end of the trainings.

Approved Expenses

- **Promotion of Training Events**
  - Printing, postage, envelopes, paper, folders, pens, other office supplies
  - Long Distance Calls (clear, marked receipt)

- **Local Training Events**
  - Trainer expenses
    - Mileage at IRS Volunteer rate (currently $0.14 per mile for 2013) OR rental car/gas as appropriate for longer distances
    - Housing
    - Meals
  - Hospitality (snacks, reasonable decorations, giveaways)
  - Material/supplies for curriculum
  - AV rental (LCD projector, screens, PA)
  - Subsidizing registration costs/scholarships (for trainings held in a retreat/overnight settings that incur expenses for housing and meals)

What can’t be Reimbursed:
- Car expenses (repairs, upkeep)
- Equipment such as computer, cell phones, and other non-consumable equipment
- Unreasonable giveaways that do not directly promote Practice Discipleship or equip leaders for ministry.
- **Contracting with someone or offering an honorarium to lead the trainings.**
- If you have a question – call and ask!

Questions:
Please contact your assigned Head Coach if you have any questions regarding approved expenses and procedures for submitting expense reports.

Synods 1A – 4A: Lisa Kramme, lisakramme@nebraskasynod.org, 402-669-6309 (Cell)
Synods 4B – 6E: Eric Carlson, carlson@seiasynod.org, 319-631-8031 (Cell)
Synods 6F – 9F: Tammy Jones West, Tammy@lutheranyouth.org, 828-308-1362 (Cell)