

Heritage & Opportunity Alliance, Inc.
HERITAGE & OPPORTUNITY ALLIANCE, INC.

REIMBURSEMENT AND EXPENSE POLICY

Preserving Heritage. Building Opportunity. Organizing Community Engagement.

Policy Number	HOA-POL-009
Effective Date	Upon Board Adoption
Approved By	Board of Directors
Applies To	Directors, officers, committees, advisory members, volunteers, employees, contractors, partners, and program participants as applicable

Purpose

This Policy establishes requirements for reimbursement of approved expenses incurred for Heritage & Opportunity Alliance, Inc..

Scope

This Policy applies to directors, officers, employees, volunteers, committee members, advisory members, contractors, program participants, and others seeking reimbursement for approved organizational expenses.

General Rule

Reimbursements may be paid only for actual, reasonable, documented, mission-related expenses approved under financial controls. Reimbursements are not compensation when limited to actual approved expenses.

Personal expenses, undocumented expenses, excessive expenses, alcohol, personal entertainment, fines, penalties, personal vehicle repairs, political contributions, and expenses outside approved purposes are not reimbursable unless specifically approved by the Board and lawful.

Pre-Approval

Expenses should be pre-approved when practical, especially travel, equipment, event purchases, youth activities, meals, printing, sponsorship expenses, contractor materials, or grant-funded costs.

Documentation

A reimbursement request must include the claimant name, date, purpose, amount, funding source if known, receipt or proof of payment, and approval signature. Missing receipts require written explanation and may be denied.

Mileage and Travel

Mileage may be reimbursed only when approved for organizational purposes and documented with date, destination, purpose, and miles. Rates may be set by the Board and may not exceed applicable tax or funder limits without Board review.

Timing

Requests should be submitted within a reasonable time after the expense, preferably within 30 days. Late requests may be denied unless approved by the Treasurer or Board.

Grant-Funded Expenses

Grant-funded reimbursements must comply with grant budgets, grant terms, allowability rules, documentation standards, and reporting obligations.

Records

The Secretary, Treasurer, or other Board-authorized records officer shall maintain records created under this Policy according to the Records Retention and Document Control Policy.

Records may include approvals, disclosures, invoices, receipts, reports, correspondence, minutes, incident reports, releases, agreements, restricted-fund logs, or other supporting documents.

Heritage & Opportunity Alliance, Inc.

Violations

Violations of this Policy may result in corrective action, reassignment, removal from a committee or volunteer role, termination of a contract, repayment, report to the Board, or other action permitted by law and organizational policy.

Retaliation against a person who raises a good-faith concern is prohibited.

Review and Amendment

This Policy may be reviewed at least annually and may be amended by the Board of Directors. The Board may adopt more detailed procedures, forms, checklists, and approval schedules consistent with this Policy.

Board Adoption

This Policy is adopted by the Board of Directors and remains in effect until amended, replaced, or rescinded by the Board.

Board Chair / President	Secretary
Name: _____	Name: _____
Signature: _____	Signature: _____
Date: _____	Date: _____