

	POLICY & PROCEDURE	POLICY NUMBER: 106
	Subject: TRAVEL-ATHLETE TRAVEL REIMBURSEMENT	REVISED DATE: 08/23/2023

A. Purpose

- a. Arizona Swimming (“AZSI”) has adopted an Athlete Travel Plan (the “Plan”) for funding limited travel expense reimbursement for eligible AZSI athletes traveling to and competing in certain national level USA Swimming meets (“Qualifying Meets”).
 - i. In April of 2012 Arizona Swimming House of Delegates made a provisional transfer of \$10,000 to open an athlete travel endowment fund. The organization was charged with developing a travel fund plan before May 31, 2013 or the money would revert to the AZSI General Fund.
 1. An Athlete Travel Plan was presented and adopted at the April 2013 House of Delegates thus meeting this requirement.
 - ii. The Plan covers Qualified Meet (see below) at locations outside the State of Arizona and within the United States.
 - iii. Cost for other athlete travel not specifically identified herein are not to be paid from the Plan.

B. Travel Fund Approval of Disbursements

- a. The Senior Committee shall approve the disbursements of the travel fund.
 - i. The Senior Committee shall meet, after notified by the AZSI office of receipt of applications by the submission deadline and the conclusion of Qualifying Meets. The Senior Committee will review and approve the applications.
 1. Such meetings shall be held in accordance to the requirements for committees contained in the By-Laws of AZSI.

2. The Committee shall review the applications and summary of proposed reimbursements provided to them by the AZSI office. Any objections shall be submitted to the office for follow-up with the applicant. If there are no objections the Senior Committee will approve the disbursement by providing the minutes of their meeting to the AZSI office.
3. The office will send disbursement to the applicants once approval from the Senior Committee has been received.

C. Plan Funding

- a. A portion of the AZSI Meet Surcharge which is charged to all participants in AZSI sanctioned or approved competitions are collected on behalf of the Plan.
 - i. Such fees are collected and paid to AZSI by teams hosting meets.
 - ii. One dollar from the meet surcharge fee is the amount of the allocation to the Plan from the Meet Surcharge collected. Funds collected on behalf of the Plan shall be transferred to the Plan at least annually.
 - iii. According to the terms of the policy as adopted by the AZSI House of Delegates, the funds received into the Plan are divided into two funds:
 1. 50% of the funds allocated to the Plan shall be held in the Athlete Travel Endowment Fund (the “Endowment”) such fund being Policy Restricted as listed in Section III, item e and
 2. 50% of the funds allocated to the Plan shall be held in the Athlete Travel Fund (the “Travel Fund”), also being restricted under the policy in Section III, item e.
 - iv. It is the purpose of the Endowment to provide a source of income for the Travel Fund. This 50 / 50 split of funds received shall continue at least until the balance in the Endowment reaches \$300,000.
 - v. Funds allocated to the Endowment shall be held and only the income generated from investment of the held balances in the Endowment shall be used for reimbursements of athlete travel

under the Plan.

1. Income from the Endowment shall be transferred to the Travel Fund no less often than annually.
- vi. Funds allocated to Travel Fund, together with income earned by the Endowment and subsequently transferred to the Travel fund, net of
1. Expenses such as bank charges, allocated personnel costs, postage and other items consisting of administrative burden, will be borne by the Plan and reimbursed to the AZSI General Fund at least annually for \$5,000.
 - a. Such expenses shall be deducted and paid prior to the allocation of funds under the Plan.
 - b. In no case shall the Endowment bear any administrative costs, all shall be reimbursed from Travel Fund.
 - c. The balance in the Travel Fund after payment of expenses will be available to reimburse athletes for travel costs ("Available Funds")
 - b. Plan funding may be reviewed by the Senior Committee or AZSI Board of Directors and the results of this review, together with any and all recommendations, shall be reported as described above to the Board of Directors.
 - c. At the end of each fiscal year, 66% of the amount of funds remaining in the Travel Fund after payment of allocations and administrative costs shall be transferred to the Endowment Fund.

D. Eligibility (collectively known as Eligible Athletes)

- a. In order to participate in the Plan, all athletes applying for any reimbursement of travel related costs under the Plan shall be 18 years of age or younger, members of an AZSI team and year-round members in good standing of USA / AZ Swimming for the periods described with the exception of Futures reimbursement which will be eligible for ½ of the established share allocation of other eligible meets.
 - i. Shares and proportional shares will be allocated based upon length of athlete's continuous registration with AZSI and memberships as

a roster athlete with an AZSI team. Calculation of such shall be based solely upon USA Swimming Time's database. The allocation of shares shall be:

1. One year or less swimming and registered with AZSI team – no funding
 2. Two years swimming and registered with AZSI team – 1/3 share (33.3%)
 3. Three years swimming and registered with AZSI team – 2/3 share (66.6%)
 4. Four years swimming and registered with AZSI team – 1 full share (100%)
- b. Athletes are eligible for a maximum of two shares per calendar year.
- c. To be eligible for reimbursement, an athlete shall compete in a no less than a minimum of four AZSI sanctioned meets (virtual or in person) as a roster member of an AZSI team during the previous consecutive 12-month period.
- i. Dual or Intrasquad meets do not count.
 - ii. Participation in such meets shall be verified through the USA Swimming Times database.
- d. Additionally, Athletes must qualify for and participate in a Qualifying Meet and such participation must be verifiable through the USA Swimming Times Database.
- i. Athlete must represent the AZSI team on which he is a roster member at the Qualifying Meet and
 - ii. Athlete must participate in at least one individual event at the Qualifying Meet for which he has achieved the meet time standard.
 - iii. Athletes who compete unattached or do not represent the AZSI team on which they are on the roster of an AZSI team at the Qualifying Meet will receive no funding under the Plan. The Board of Directors may waive this participation standard if:
 1. At least 7 days prior to the Board of Directors meeting immediately preceding the entry deadline for the

Qualifying Meet for which reimbursement is to be requested.

- a. the Athlete files a request for such waiver in writing with the AZSI office
- iv. No share or proportional share shall be available or awarded to an athlete that competes only in time trials or is a relay only swimmer at a Qualifying Meet.
- e. List of Qualifying Meets shall be as follows until any update to the policy:
 - i. Olympic Trials (in Trials years), USA Swimming Summer and Winter Nationals (and/or International Team Trials in applicable years) USA Swimming Summer and Winter Junior Nationals, US Open, and USA Swimming Futures when located outside of athlete's metropolitan area.

Should USA Swimming modify its policy regarding schedule of or number of meets, the Committee may make changes to schedule of Qualifying Meets with the advice and consent of the Board of Directors

E. Calculation of Shares

- a. Maximum amount available to athletes is based upon shares. The Committee will calculate available shares by Qualifying Meets. Each Share has a maximum, such maximum being determined by the Committee based on Available Funds.
 - i. Shares shall be equal to the product of the total Available Funds divided by total number of Eligible Athletes applying for reimbursement LIMITED to maximum reimbursement as determined by the Committee.
- b. At each of the semiannual meetings, the Committee shall determine the amount of funds available ("Available Funds) for disbursements to Eligible Athletes.
 - i. In no case shall the Available Funds exceed the amount currently in the Athlete Travel Fund.
- c. Limitations for calendar years are:

- i. From 2023 Forward one full Share shall not exceed \$500 and ½ share shall not exceed \$250.

- 1. Regardless of balance in Athlete Travel Fund, combined distributions to all Eligible Athletes shall not exceed \$30,000 for the year.

- d. The Committee will review the Share allocation to annually to determine funding of maximum shares, Available Funds, and make recommendations to the Board of Directors for action.

F. Travel Fund Disbursement

- a. Once the athlete submits the application for reimbursement attendance and participation will be verified. Once verified the athlete will be eligible to receive the reimbursement not to exceed one full share.

G. Reimbursement Process

- a. Eligible Athletes shall request disbursement of up to one full share for participation in Qualifying Meet within 30 calendar days after the close of competition of the Qualifying Meet.
 - i. Requests received late will not be processed and no disbursement will be available.
- b. Requests shall be submitted using the Athlete Travel Fund Request Form. Incomplete or unsigned applications will not be processed.
- c. Requests are reviewable by the Senior Committee and additional information may be requested prior to determination of final eligibility and payment.
- d. If the request for funding is denied the applicant by the Senior Committee the applicant and/or their parent will be notified by the AZSI office. The athlete may appeal such denial to the Board of Directors.
 - i. Such appeal shall be in writing and filed with the AZSI office at office@azswimming.org within 20 days of the denial.
- e. The Board of Directors decision on any appeal shall be final.

UPDATES

Date	By whom	Abstract	Section	Control #
4-21-2012	HOD	Travel Policy Endowment	All	NEW
4-20-2013	HOD	Travel Policy	All	14-7
12-08-2015	Office	Revision to Applic Forms		16-008
9-14-2016	BOD	Travel Policy	All	16-029
6-21-2017	BOD	Rev # Meets	All	16-033
10-19-2018	BOD	Address-Form		
8-19-2020	BOD	Committee Review	Various	20-8
11-17-2021	BOD	Committee &BOD Rev	Various	21-22
10-18-2022	BOD	BOD review update	Various	22-19
02-02-2023	BOD	Committee/BOD Review	E.c.i	23-001
08-23-2023	BOD	BOD Review/Hskpg	Various	23-005



Arizona Swimming, Inc.
Application for Athlete Travel Reimbursement

Instructions

**THE MOST OFTEN REASON FOR DENIAL OF REIMBURSEMENT IS
*****AN IMPROPERLY COMPLETED APPLICATION FORM*******

1. Please read the travel policy (106 - Athlete Travel Reimbursement) that is attached carefully. It is your responsibility to comply with all aspects of the policy and procedure.
2. The form must be signed by the parent of the athlete if the athlete is under 18. The form must be signed by the athlete if the athlete is 18 years of age.
3. Required participation in Arizona Swimming sanctioned competition will be verified through SWIMS. If you are uncertain as to which meets you participated in, contact your Coach for assistance. It is your responsibility to satisfy the participation documentation requirement and write in correct information. Some types of meets, such as Dual Meets and the Grand Prix may not qualify under the participation standard. Check AZSI Policy 106 for specific requirements.
4. Be specific as to the Qualifying Meet in which you participated and the events in which you competed. Your participation will be verified through SWIMS and is required in order to qualify for reimbursement.
5. The completed, signed application must be received by the AZSI office no later than 30 calendar days after the last day of the meet for which you are applying for assistance. No exceptions.

Office mailing address is:

**Arizona Swimming, Inc.,
301 E Bethany Home Rd., Suite A227
Phoenix, AZ 85012**

OR you may scan and email .pdf of application to office@azswimming.org

6. The Travel Fund Committee will review your application. They may contact you for additional information regarding your application, they will verify certain information on your application through SWIMS and they may contact others regarding your application.
7. Your reimbursement, if any, will be mailed to the address on record in the USA Swimming SWIMS database. If you have moved recently, it is your responsibility to report the change in address to your club or directly to Arizona Swimming in order to update your membership record and process your application. It is your responsibility to insure we have a correct address.

INCOMPLETE APPLICATIONS WILL CAUSE DENIAL OF REIMBURSEMENT MONIES



Arizona Swimming, Inc.
Application for Athlete Travel Reimbursement

READ CAREFULLY, COMPLETE FULLY AND RETURN TO office@azswimming.org or send by regular mail to address provided in policy.

Athletes Name: _____ **Your Member ID Number:** _____

FAMILY Email address: _____ **USA Swimming Club :** _____

ADDRESS: _____

Membership

I have continuously participated in USA/AZSI Swimming since: _____ (year)

Participation

***required to list four meets you have participated in within the territory of Arizona Swimming, LSC**

DO NOT LIST THE QUALIFYING MEET IN WHICH YOU ARE SUBMITTING THIS REQUEST FOR REIMBURSEMENT FOR.

I have participated in the following **AZSI Sanctioned Competitions** (**Arizona Meets NOT including Grand Prix**)

#1	_____	_____	_____
	Meet Name	Meet Location	Date
#2	_____	_____	_____
	Meet Name	Meet Location	Date
#3	_____	_____	_____
	Meet Name	Meet Location	Date
#4	_____	_____	_____
	Meet Name	Meet Location	Date

Note: Meets must be within 12 months immediately preceding the Qualified Meet where reimbursement is being requested.

Information Regarding Qualified Meet

I qualified for, and competed in: _____
(Meet Name/Location of which I am seeking travel reimbursement)

On these dates: _____
(dates of the meet)

At that meet I swam:

#1	_____	#2	_____
	Event Name		Event Name
#3	_____	#4	_____
	Event Name		Event Name

****Please list only four (Events will be verified through USA Swimming Time Database. **Time Trials & Relays only events do NOT qualify**)***

I _____ competed in the above-named qualifying meet on the dates indicated and did not receive any other reimbursement for my expenses at this meet. I understand that receipts may be requested by the Arizona Swimming Office.

Athletes Signature
(if 18 or older)

Date

Parent/Guardian Signature
(if Athlete is less than 18 years old)

Date

Actual Reimbursement is based upon annual share computation and limitations placed on it by AZSI Policy 106