



# OhioHealth

BELIEVE IN WE™

## Growing Global Leaders... Advancing Palliative Care



# Resource Management

**Frank D. Ferris, MD, FAAHPM, FAACE**  
ED, Palliative Medicine, Research & Education

**LDI C2 RC1**  
February 05-12, 2013

# Objectives

- **Resources needed to successfully**
  - Develop leadership skills**
  - Complete palliative care activities**
- **Utilize**
  - Receipt submission tool**
  - Financial Management tool**
- **Process for reviewing & reporting**
- **Allowable expenses using LDI stipend**

# **IDP – 3 Parts**

## **Part**

**1. Leadership Skills**

**2. PC Activities**

**3. Resources / Budget**

# Types of Resources ?

- 
- 
- 
- 
-

# Resources for Your IDP

- What resources will you need to be successful ?
- When will you need them?
- What will they cost ?  
How will you pay for them ?

|                                    | <b>LDI</b> | <b>Leadership Skills</b> | <b>PC Activities</b> |
|------------------------------------|------------|--------------------------|----------------------|
| <b>Personnel</b>                   |            |                          |                      |
| <b>Consultants</b>                 |            |                          |                      |
| <b>Supplies</b>                    |            |                          |                      |
| <b>Environment / Communication</b> |            |                          |                      |
| <b>Courses / Conferences</b>       |            |                          |                      |
| <b>Association Memberships</b>     |            |                          |                      |
| <b>Other</b>                       |            |                          |                      |

# Working with LDI...



|                                    | <b>LDI</b> | <b>Leadership Skills</b> | <b>PC Activities</b> |
|------------------------------------|------------|--------------------------|----------------------|
| <b>Personnel</b>                   |            |                          |                      |
| <b>Consultants</b>                 |            |                          |                      |
| <b>Supplies</b>                    |            |                          |                      |
| <b>Environment / Communication</b> |            |                          |                      |
| <b>Courses / Conferences</b>       |            |                          |                      |
| <b>Association Memberships</b>     |            |                          |                      |
| <b>Other</b>                       |            |                          |                      |

**• Upgrade internet service**

|                                    | <b>LDI</b> | <b>Leadership Skills</b> | <b>PC Activities</b> |
|------------------------------------|------------|--------------------------|----------------------|
| <b>Personnel</b>                   |            |                          |                      |
| <b>Consultants</b>                 |            |                          |                      |
| <b>Supplies</b>                    |            |                          |                      |
| <b>Environment / Communication</b> |            |                          |                      |
| <b>Courses / Conferences</b>       |            |                          |                      |
| <b>Association Memberships</b>     |            |                          |                      |
| <b>Other</b>                       |            |                          |                      |

- **Health, dental, travel insurance**

# **Your Leadership Skills...**

|                                    | <b>LDI</b> | <b>Leadership Skills</b> | <b>PC Activities</b> |
|------------------------------------|------------|--------------------------|----------------------|
| <b>Personnel</b>                   |            |                          |                      |
| <b>Consultants</b>                 |            |                          |                      |
| <b>Supplies</b>                    |            |                          |                      |
| <b>Environment / Communication</b> |            |                          |                      |
| <b>Courses / Conferences</b>       |            |                          |                      |
| <b>Association Memberships</b>     |            |                          |                      |
| <b>Other</b>                       |            |                          |                      |

**• Local coach for a specific skill**

|                                    | <b>LDI</b> | <b>Leadership Skills</b> | <b>PC Activities</b> |
|------------------------------------|------------|--------------------------|----------------------|
| <b>Personnel</b>                   |            |                          |                      |
| <b>Consultants</b>                 |            |                          |                      |
| <b>Supplies</b>                    |            |                          |                      |
| <b>Environment / Communication</b> |            |                          |                      |
| <b>Courses / Conferences</b>       |            |                          |                      |
| <b>Association Memberships</b>     |            |                          |                      |
| <b>Other</b>                       |            |                          |                      |

**• English lessons**

|                                    | <b>LDI</b> | <b>Leadership Skills</b> | <b>PC Activities</b> |
|------------------------------------|------------|--------------------------|----------------------|
| <b>Personnel</b>                   |            |                          |                      |
| <b>Consultants</b>                 |            |                          |                      |
| <b>Supplies</b>                    |            |                          |                      |
| <b>Environment / Communication</b> |            |                          |                      |
| <b>Courses / Conferences</b>       |            |                          |                      |
| <b>Association Memberships</b>     |            |                          |                      |
| <b>Other</b>                       |            |                          |                      |

• **Books, journals**

# **SDH Elective Week after RC2 or RC3...**

**Explore a  
comprehensive program  
based on the WHO  
Public Health Model...**

| TIME             | Monday October 31<br>Keck I   | Tuesday November 1   | Wednesday November 2   | Thursday November 3  | Friday November 4   |
|------------------|---|--|--|--|---|
| 7:30 AM          | Pickup from Front Door of Hotel to SDH  |  |  |  |   |
| 8:00 AM          | WELCOME/INTRODUCTIONS<br>(H. McNeal, F.Ferris)  | Meet with your ride-along as scheduled   | Meet with your ride-along as scheduled                                     | Meet with your ride-along as scheduled   | Meet with your ride-along as scheduled  |
| 8:15 - 9:00 AM   | SD Hospice/IPM Overview and History<br>(F. Ferris)                                    | CLINICAL EXPERIENCE<br>(8 AM - 3:00 PM)  | CLINICAL EXPERIENCE<br>(8 AM - 3:00 PM)                                    | CLINICAL EXPERIENCE<br>(8 AM - 3:00 PM)  | CLINICAL EXPERIENCE<br>(8 AM - 3:00 PM)   |
| 9:00 - 10:00 AM  | The Population-Based Approach to Care and its Application to SDH/IPM<br>(F. Ferris)   |  |  |  |   |
| 10:00 - 10:30 AM | <b>BREAK</b>  |  |  |  |   |
| 10:30 - 11:00 AM | Care in the In-Patient Setting: Palliative Care Consult Services<br>(G. Elia)         |  |  |  |   |
| 11:00 - 11:30 PM | IPM and International Program<br>(F. Ferris)  |  |  |  |   |
| 11:30 - 12:00 PM | Providing Care After-hours<br>(Admissions,Triage, Team 7, Crisis Care)<br>(Carol Bos) |  |  |  |   |
| 12:00 - 12:30 PM | Pharmacy and Therapeutics<br>(R. Pirrello)  |  |  |  |   |
| 12:30- 1:30 PM   | <b>LUNCH<br/>On Your Own</b>  |  |  |  |   |
| 1:30 - 2:00 PM   | Palliative Psychiatry<br>(S. Irwin)   | CLINICAL EXPERIENCE<br>(12:30 PM - 3:30 PM)                                    | CLINICAL EXPERIENCE<br>(12:30 PM - 3:00 PM)                                | CLINICAL EXPERIENCE<br>(12:30 PM - 3:00 PM)                                    | CLINICAL EXPERIENCE<br>(12:30 PM - 2:00 PM)   |
| 2:00 - 2:30 PM   | Patient Care in a Home Setting<br>(Sharon O'Mary)                                     |  |  |  | <b>Please begin to make your way to Bldg 404, Mission Valley</b>  |
| 2:30 - 3:00 PM   | Tour of Access Center<br>(N. Johnson)   |  |  |  | Bldg 404, Boardroom<br>Foundation / SDHIPM Funding<br>Marketing / Community Outreach<br>(K. Pacurer, CEO & T. Bruckner) |
| 3:00 - 3:30 PM   | <b>BREAK</b>  |  |  |  |   |
| 3:30 - 4:00 PM   | Volunteer Services<br>(K. Heinrich)   | <b>Please begin to make your way back to SDHIPM<br/>Keck Conference Room 1</b> | Keck I<br>Center for Grief Care / Education<br>(L. Ison)                   | <b>Please begin to make your way back to SDHIPM<br/>Keck Conference Room 1</b> | Pediatric Services<br>(H. Hall)   |
| 4:00 - 5:00 PM   | Wrap-Up, Q & A<br>(F. Ferris, S. Moore)   | Daily Review/Summary/Reflections<br>(F. Ferris, S. Moore)                      | (F. Ferris, S. Moore)  | Daily Review/Summary/Reflections<br>(F. Ferris, G Buckholz)                    | Bldg 404, Boardroom<br>Week Review/Summary/Reflections/<br>Evaluations<br>(F. Ferris, G Buckholz)                       |
| 6:00-9:00 PM     | Call your ride-along to confirm where to meet in the morning.                         | Call your ride-along to confirm where to meet in the morning.                  | Dinner, Antica Tratorria, La Mesa<br>We will meet at 5:30 at the 4311 Bldg | Call your ride-along to confirm where to meet in the morning.                  | End of Program  |



|                             | LDI | Leadership Skills | PC Activities |
|-----------------------------|-----|-------------------|---------------|
| Personnel                   |     |                   |               |
| Consultants                 |     |                   |               |
| Supplies                    |     |                   |               |
| Environment / Communication |     |                   |               |
| Courses / Conferences       |     |                   |               |
| Association Memberships     |     |                   |               |
| Other                       |     |                   |               |

**SDH Elective Week  
after RC2 or RC3**

- Airfare & taxi ( paid )
- Hotel
- Meals

# EAPC 2013 INVITATION

13<sup>th</sup> WORLD CONGRESS OF THE EUROPEAN ASSOCIATION FOR PALLIATIVE CARE



30.5.– 2.6.2013 PRAGUE  
CZECH REPUBLIC  
SEE YOU IN PRAGUE!

## Scientific Committee

Lukas Radbruch, Germany (Chair)  
Ladislav Kabelka, Czech Republic  
(Chair of the Organising Committee)  
Joachim Cohen, Belgium

Agnes Csirkos, Hungary  
Stein Kaasa, Norway  
Wojcek Leppert, Poland  
David Oliver, United Kingdom

Sheila Payne, United Kingdom  
Sabine Pleschberger, Austria  
Esther Schmidlin, Switzerland  
Ondrej Slama, Czech Republic



EUROPEAN ASSOCIATION  
FOR PALLIATIVE CARE

www.eapcnet.eu



Czech Society for  
Palliative Medicine  
member of J. E. Purkyně  
Czech Medical Association

www.paliativnimedicina.cz

Congress Organiser:  
**INTERPLAN AG**

Email: eapc2013@interplan.de

|                                    | <b>LDI</b> | <b>Leadership Skills</b> | <b>PC Activities</b> |
|------------------------------------|------------|--------------------------|----------------------|
| <b>Personnel</b>                   |            |                          |                      |
| <b>Consultants</b>                 |            |                          |                      |
| <b>Supplies</b>                    |            |                          |                      |
| <b>Environment / Communication</b> |            |                          |                      |
| <b>Courses / Conferences</b>       |            |                          |                      |
| <b>Association Memberships</b>     |            |                          |                      |
| <b>Other</b>                       |            |                          |                      |

**Conference w Poster - EAPC Prague 2013**

- Airfare
- Taxi
- Hotel
- Meals
- Registration

# **Your Palliative Care Activities...**

|                                    | <b>LDI</b> | <b>Leadership Skills</b> | <b>PC Activities</b> |
|------------------------------------|------------|--------------------------|----------------------|
| <b>Personnel</b>                   |            |                          |                      |
| <b>Consultants</b>                 |            |                          |                      |
| <b>Supplies</b>                    |            |                          |                      |
| <b>Environment / Communication</b> |            |                          |                      |
| <b>Courses / Conferences</b>       |            |                          |                      |
| <b>Association Memberships</b>     |            |                          |                      |
| <b>Other</b>                       |            |                          |                      |

- **Clinical team**
- **Administrative support**

|                                    | <b>LDI</b> | <b>Leadership Skills</b> | <b>PC Activities</b> |
|------------------------------------|------------|--------------------------|----------------------|
| <b>Personnel</b>                   |            |                          |                      |
| <b>Consultants</b>                 |            |                          |                      |
| <b>Supplies</b>                    |            |                          |                      |
| <b>Environment / Communication</b> |            |                          |                      |
| <b>Courses / Conferences</b>       |            |                          |                      |
| <b>Association Memberships</b>     |            |                          |                      |
| <b>Other</b>                       |            |                          |                      |

- **Office or conference space**

|                                    | <b>LDI</b> | <b>Leadership Skills</b> | <b>PC Activities</b> |
|------------------------------------|------------|--------------------------|----------------------|
| <b>Personnel</b>                   |            |                          |                      |
| <b>Consultants</b>                 |            |                          |                      |
| <b>Supplies</b>                    |            |                          |                      |
| <b>Environment / Communication</b> |            |                          |                      |
| <b>Courses / Conferences</b>       |            |                          |                      |
| <b>Association Memberships</b>     |            |                          |                      |
| <b>Other</b>                       |            |                          |                      |

- **Supplies, education tools**
- **Meals ( limited )**

|                                    | <b>LDI</b> | <b>Leadership Skills</b> | <b>PC Activities</b> |
|------------------------------------|------------|--------------------------|----------------------|
| <b>Personnel</b>                   |            |                          |                      |
| <b>Consultants</b>                 |            |                          |                      |
| <b>Supplies</b>                    |            |                          |                      |
| <b>Environment / Communication</b> |            |                          |                      |
| <b>Courses / Conferences</b>       |            |                          |                      |
| <b>Association Memberships</b>     |            |                          |                      |
| <b>Other</b>                       |            |                          |                      |

- **IAHPC Membership**



# Exercise 1

**List 5 resources / expenses  
you hope to pay for  
with your LDI Stipend...**

**What will your  
Resources cost ?**

**Which expenses will you pay  
for with your LDI Stipend ?**

# Examples of Allowable Expenses...

|                                    | <b>LDI</b> | <b>Leadership Skills</b> | <b>PC Activities</b> |
|------------------------------------|------------|--------------------------|----------------------|
| <b>Personnel</b>                   |            |                          |                      |
| <b>Consultants</b>                 |            |                          |                      |
| <b>Supplies</b>                    |            |                          |                      |
| <b>Environment / Communication</b> |            |                          |                      |
| <b>Courses / Conferences</b>       |            |                          |                      |
| <b>Association Memberships</b>     |            |                          |                      |
| <b>Other</b>                       |            |                          |                      |

- **Upgrade internet service**

**2012: 10 x \$30 = \$300**

**2013: 12 x \$30 = \$360**

|                                    | <b>LDI</b> | <b>Leadership Skills</b> | <b>PC Activities</b> |
|------------------------------------|------------|--------------------------|----------------------|
| <b>Personnel</b>                   |            |                          |                      |
| <b>Consultants</b>                 |            |                          |                      |
| <b>Supplies</b>                    |            |                          |                      |
| <b>Environment / Communication</b> |            |                          |                      |
| <b>Courses / Conferences</b>       |            |                          |                      |
| <b>Association Memberships</b>     |            |                          |                      |
| <b>Other</b>                       |            |                          |                      |

• **Health, dental, travel insurance**  
**2012: \$300**  
 • **2013: \$300**

|                                    | <b>LDI</b> | <b>Leadership Skills</b> | <b>PC Activities</b> |
|------------------------------------|------------|--------------------------|----------------------|
| <b>Personnel</b>                   |            |                          |                      |
| <b>Consultants</b>                 |            |                          |                      |
| <b>Supplies</b>                    |            |                          |                      |
| <b>Environment / Communication</b> |            |                          |                      |
| <b>Courses / Conferences</b>       |            |                          |                      |
| <b>Association Memberships</b>     |            |                          |                      |
| <b>Other</b>                       |            |                          |                      |

- **English lessons**  
 $20 \times \$35 = \$700$

|                             | LDI | Leadership Skills | PC Activities |
|-----------------------------|-----|-------------------|---------------|
| Personnel                   |     |                   |               |
| Consultants                 |     |                   |               |
| Supplies                    |     |                   |               |
| Environment / Communication |     |                   |               |
| Courses / Conferences       |     |                   |               |
| Association Memberships     |     |                   |               |
| Other                       |     |                   |               |

**SDH Elective Week  
after RC2**

**Airfare & taxi ( paid )**

- **Hotel - 7 x \$120 = \$840**
- **Meals - 7 x \$50 = \$350**

|                                    | <b>LDI</b> | <b>Leadership Skills</b> | <b>PC Activities</b> |
|------------------------------------|------------|--------------------------|----------------------|
| <b>Personnel</b>                   |            |                          |                      |
| <b>Consultants</b>                 |            |                          |                      |
| <b>Supplies</b>                    |            |                          |                      |
| <b>Environment / Communication</b> |            |                          |                      |
| <b>Courses / Conferences</b>       |            |                          |                      |
| <b>Association Memberships</b>     |            |                          |                      |
| <b>Other</b>                       |            |                          |                      |

- **IAHPC 3-year Membership for Romania at 50% through LDI = \$65**



# Financial Stipends

- Anticipated

  - \$5000 per Leader over 2 years

  - \$3000 per consultative site visit

- Use fully justified in IDP

- All **activities & expenses** must be **preapproved** by the LDI Team Coach

- **Original receipts** required

**Not preapproved, no receipts → No \$**

# Exercise 2

**Project the cost of these  
5 resources / expenses...**

# **Budgeting...**

**List all projected expenses you hope to pay for with your LDI Stipend...**

# ...IDP P3: Financial - Budgeting...

## Financial Management Report February 2012

Name: Joe Schmo  
 Date Report Submitted: (1 Feb 2012)

Date Stipend Received: 1-Jan-2012  
 Amount Received (In US Dollars): \$2,000.00

| IDP Activity Explanation<br><i>What are you hoping to do?</i> | Projected Expenses<br><i>[how much do you think it will cost?]<br/>(In US Dollars)</i> | Approval of Projected Expenses<br>(Coach) | Date<br><i>(1 Jan 2012)</i> | Description of Expense<br><i>What did you spend your money on and how does it relate to your IDP activity?</i> | Actual Expenses<br><i>(In US Dollars)</i> | Amount of Stipend Remaining<br><i>(In US Dollars)</i> | Receipt Scanned and Attached<br><i>Yes/No</i> |
|---|--|---|-----------------------------|--|---|---|---|
|   |  |   |                             |  |   |   |   |
|   |  |   |                             |  |   |   |   |
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|   |  |   |                             |  |   |   |   |
|   |  |   |                             |  |   |   |   |

Total Amount budgeted:

Amount to Transfer to Next Month:

E-Mail this report, along with your receipts to [ldi@sdhospice.org](mailto:ldi@sdhospice.org) by the last day of every month.

If you have any questions, please contact your LDI team coach.

Types of expenses can be: airfare, hotel, taxi, meals, books, conference fees, health/dental/travel insurance, visa, education supplies.

Approved by LDI Team Coach:   
 Initials & Date

# **Exercise 3**

**Enter your projected  
expenses into your Excel  
Financial Report...**

**Submit  
your Projected  
Expenses to your  
Coach for approval...**

**Report  
your Expenses  
at the  
End of each Month...**

# Label Each Receipt

1. Date of expense
2. Purpose... related to IDP
3. Currency
4. Exchange rate to US dollars
5. Total in US dollars





# Reporting Expenses Monthly

## For each Receipt...



THE INSTITUTE FOR  
PALLIATIVE MEDICINE  
*at San Diego Hospice*  
INTERNATIONAL PALLIATIVE  
CARE LEADERSHIP  
DEVELOPMENT INITIATIVE

### Report your expenses at the end of each month

Clearly label each receipt in English with:

1. Date of expense
2. Purpose of this expense; how it relates to your LDI activities
3. Currency spent
4. Exchange rate and conversion to US Dollars ([www.xe.com](http://www.xe.com))
5. Record and circle the final US Dollar amount on the receipt

Attach **ONLY ONE** receipt to this page over this box

Scan or photograph this page and e-mail the image (jpg or tiff) to [LDI@sdhospice.org](mailto:LDI@sdhospice.org) (ensure that it easily readable)

Bring **ALL** your original receipts and these pages to each Residential Course in October 2012 and October 2013

|   |  |
|---|--|
| 1. Date of Expense.   |  |
| 2. Purpose of spending the money as it relates to your LDI activities |  |
| 3. What currency did you spend?                                       |  |
| 4. What is the exchange rate to US Dollars? (show calculations)       |  |
| 5. Total US Dollars:  |  |

# Currency conversion...

[www.XE.com](http://www.XE.com)

# Reporting Expenses Monthly

# For each Receipt...



THE INSTITUTE FOR  
PALLIATIVE MEDICINE  
*at San Diego Hospice*  
INTERNATIONAL PALLIATIVE  
CARE LEADERSHIP  
DEVELOPMENT INITIATIVE

*Avialux*

**INVOICE No. 4**

DATE 29 april 2011

To: [REDACTED]

| Services                   | Quantity<br>BUC | Amount<br>EUR     | Total<br>EUR            |
|----------------------------|-----------------|-------------------|-------------------------|
| AIR TICKETING: KIV-LIS-KIV | 1               | 630,43            | 630,43                  |
|                            |                 |                   |                         |
|                            |                 |                   |                         |
|                            |                 |                   |                         |
|                            |                 | Total<br>services | <b>TOTAL<br/>630,43</b> |



Signature,

Make all that payable to **AVIA LUX**, bank account **2224710SV41338117100**  
mdl, BC Mobiasbanca-Gruppe Societe Generale SA, SWIFT CODE MOBBMD22

AVIA LUX S.R.L.  
[REDACTED]

Tel: + 373-22-50 04 04  
Tel/Fax: + 373-22-50 04 03

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|-----------------|---------------------------------------|
| <b>Date</b>     | <b>Apr 29 2011</b>                    |
| <b>Purpose</b>  | <b>EAPC Congress</b>                  |
| <b>Currency</b> | <b>Euro</b>                           |
| <b>Exchange</b> | <b>1 Euro = 1.33 USD</b>              |
| <b>Total</b>    | <b>€ 630.43 x 1.33 = US \$ 838.47</b> |

# ...IDP P3: Financial - Expenses...

## Financial Management Report February 2012

Name:   
Date Report Submitted:

Date Stipend Received   
Amount Received (In US Dollars)

| IDP Activity Explanation<br><small>What are you hoping to do?</small> | Projected Expenses<br><small>[how much do you think it will cost?] (In US Dollars)</small> | Approval of Projected Expenses (Coach) | Date<br><small>(1 Jan 2012)</small> | Description of Expense<br><small>What did you spend your money on and how does it relate to your IDP activity</small> | Actual Expenses<br><small>(In US Dollars)</small> | Amount of Stipend Remaining<br><small>(In US Dollars)</small> | Receipt Scanned and Attached<br><small>Yes/No</small> |
|---|--|--|-------------------------------------|---|---|---|---|
|   |  |  | Apr 29 2011                         | Flight to EAPC  | \$838.47  | \$1161.53   | Yes   |
|   |  |  |                                     |   |   |   |   |
|   |  |  |                                     |   |   |   |   |
|   |  |  |                                     |   |   |   |   |
|   |  |  |                                     |   |   |   |   |
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|   |  |  |                                     |   |   |   |   |
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|   |  |  |                                     |   |   |   |   |
|   |  |  |                                     |   |   |   |   |
|   |  |  |                                     |   |   |   |   |
|   |  |  |                                     |   |   |   |   |
|   |  |  |                                     |   |   |   |   |
|   |  |  |                                     |   |   |   |   |
|   |  |  |                                     |   |   |   |   |
|   |  |  |                                     |   |   |   |   |
|   |  |  |                                     |   |   |   |   |
|   |  |  |                                     |   |   |   |   |
|   |  |  |                                     |   |   |   |   |
|   |  |  |                                     |   |   |   |   |

Total Amount budgeted

Amount to Transfer to Next Month

E-Mail this report, along with your receipts to [ldi@sdhospice.org](mailto:ldi@sdhospice.org) by the last day of every month.

If you have any questions, please contact your LDI team Coach

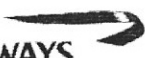
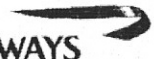

Types of expenses can be: airfare, hotel, taxi, meals, books, conference fees, health/dental/travel insurance, visa, education supplies.

Approved by LDI Team Coach

Initials & Date

# For Flights...

# Include Boarding Passes...

|   |                            |   |  |
|---|----------------------------|---|--|
| BRITISH AIRWAYS  |                            | BRITISH AIRWAYS                                  |  |
| [REDACTED]  |                            | NAME OF PASSENGER<br>[REDACTED]   |  |
| BA 856 13JUN PRAGUE PRG   |                            | EURO TRAVELLER<br>FROM LONDON LHR<br>TO PRAGUE PRG  |  |
| SEAT<br><b>18E</b>  | GATE CLOSES<br><b>1435</b> | GATE  |  |
| EURO TRAVELLER  |                            | FLIGHT NO. CLASS/DATE TIME<br>BA 856 M 13JUN1455  |  |
|   |                            | GATE GATE CLOSES SEAT SMOKE<br>1435 <b>18E</b>  |  |
|   |                            | PCS CK HT UNCK SEQ NO<br>0 0 0 073  |  |
| <b>BOARDING PASS</b><br>CARTE D'ACCES A BORD/BORDKARTE<br>ТАРГЕТ АС ПРАВАНАСІА ПРАВАНАСІА         |                            | SUBJECT TO CONDITIONS OF CARRIAGE, COPIES<br>AVAILABLE ON REQUEST. SEE IMPORTANT<br>NOTICES ON THE BACK OF THIS DOCUMENT.           |  |
|   |                            | == ETKT   |  |

# Exercise 4

Enter 2 of these 5 expenses  
into your  
Excel Financial Report...

**Photograph or  
scan each  
Receipt...**

**Email copy of receipts with  
Financial Report to LDI...**



**Place original  
receipts in  
Envelope...**

**Bring to next RC...**

**Examples of  
Expenses  
Not Allowable...**

# Expenses Not Allowed Include

- Food / materials for courses  
> \$100 / per event
- Business or First airfares  
( you can upgrade from Economy)
- Luggage, personal toiletries
- Charity donations

**Your coach is the final decision-maker**

**For more details,  
see the Financial  
Management  
Guidelines or  
consult your coach...**



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