How to Submit Expenses for Reimbursement

Once the Gathering is over, you are welcome to submit your expenses for reimbursement. Please follow these steps:

Step 1

List your expenses on our Expense Form. (Download excel file)

Please use the "Submitted by" and "Payee" boxes to clarify to whom the reimbursement check should be made out (an individual or an organization), and complete the following for each expense:

- Receipt # (Number receipts and combine them in order as a PDF.)
- Date of expense
- Purpose and Description (For example, "taxi to airport.")
- Amount of each expense (Total amount will auto populate.)

Step 2

Provide a receipt for each expense.

- The 2018 mileage reimbursement rate set by the IRS is 54.5 cents per mile. When requesting mileage reimbursement, be sure to note the mileage amount in the description field and include a copy of driving directions from Google Maps or a similar site in your receipts.
- Credit card statements will not be accepted as receipts.

Step 3

If the recipient is a new payee or has a new mailing address, enter the address and provide a completed W9 form.

Download a blank W9 form

Step 4

Email your signed W9 Form, PDF receipts, and the excel version of the Expense Form to Michelle Mengel at Michelle@fundforsharedinsight.org.

- After you send, assuming all information is approved, you should receive a reimbursement check in the mail from Rockefeller Philanthropy Advisors (our fiscal sponsor) within 30 days.

Note:

The following items will not be reimbursed: Incidentals or room service at the hotel, limo or town car service, entertainment expenses, airplane seat upgrades to business or first class