



Region X Travel/Expense Reimbursement Policy
Revised August 19, 2017

- I. Introduction –Region X recognizes that officer and committee activities are essential to maintaining volunteer involvement in ASHRAE. These activities provide real and tangible benefits to our membership, the public, the profession and our industry thereby making them worthy of financial support. The ASHRAE Society assists us in absorbing many of our transportation expenses with reimbursement for transportation to various society meetings, central training, allocated chapter visits and such, but there are often additional expenses incurred by the volunteer member (i.e. lodging, parking) Many of our members utilize personal funds or employer support to mitigate their travel expenses. However, there are occasions where members do not have the necessary resources to defray these costs, and Region X will assist members with those costs within the limits of this policy. The member acting and traveling on behalf of Region X shall always seek to minimize the cost to Region X.

The intent of this policy is to supplement the guidelines set forth in *Region X, ASHRAE Guidelines for Regional Finance*. The budget for travel reimbursements is set according to these guidelines and must be approved by the CRC yearly. This policy provides a description of how these budgeted funds are allocated and provides limits on its use. Additionally this policy will allow for the regional representatives from Region X to properly budget their travel on the behalf of the region.

II. General

- a. Policy – Region X Executive Committee is a volunteer group comprised of a DRC, RVC's, nominating committee members, YRC, Historian, Government Affair, Region Members Council Member, and Treasurer in order to support the efforts of our 14 regional chapters and Society. The Region carries out various activities and travels to society, regional and chapter meetings as defined subsequently. This policy identifies the costs which are reimbursable from the Region X general fund as approved by the Chapters Regional Committee.
- b. Time Frame to Submit Expenses to Region X – All requests for reimbursement of expense from regional funds must be submitted, in writing, with substantial support documentation (receipts) to the regional treasurer and DRC within 30 days from the date of the expense incurrence, but not more than 90 days.
- c. Time frame for receipt of reimbursement from Region X – Reimbursements shall be approved by the DRC and mailed to the recipient within 30 days of submittal.

- d. Society Reimbursed Expenses: There are expenses for Regional activities that are reimbursed by Society. The Region will not reimburse for any costs that may be submitted to Society. It is the individual's responsibility to ensure that they submit their society reimbursement request and get it approved by the DRC in a timely manner. The region will not reimburse the individual if they do not get their reimbursement submitted to society in time. Reference Appendix D of the Manual for Regional Operations for a complete and up-to-date to list of society reimbursed expenses. All claims should be submitted to ASHRAE's comptroller within 30 days of the travel date. Claims submitted after 90 days will not be reimbursed (see Society Transportation Reimbursement Voucher, page 2, Documentation).
- e. The maximum amounts shown below are set to encourage carpooling at the departure location and at the meeting/visit location to minimize expenses to the Region.
- f. Society Allocations – Each year the Region X Executive Committee is provided with an allocated number of chapter visits in which Society will reimburse for transportation expenses only, provided that transportation reservations are made in accordance with the Society travel reimbursement policy. This pool of visits is used for chapter visits, the regional planning meeting and other miscellaneous travel, as required, in the region. The DRC shall determine how many visits shall be used for each. Should the region exceed the number of society allocated chapter visits, Region will reimburse transportation expenses for chapter visits conducting Regional business provided that reservations follow the same policy procedures as laid out by Society travel reimbursement policy outlined by *Appendix D in Regional Operations Manual*. All claims should be submitted to ASHRAE's comptroller within 30 days of the travel date. Claims submitted after 90 days will not be reimbursed (see Society Transportation Reimbursement Voucher, page 2, Documentation).

III. Chapter Visits

- a. Society Allocations – The DRC shall determine how many region allocated visits shall be used for chapter visits. Society will reimburse for transportation expenses only, provided that transportation reservations are made in accordance with the Society travel reimbursement policy. With pre-approval of the DRC, should the region exceed the number of society allocated chapter visits, Region will reimburse transportation expenses for chapter visits conducting Regional business provided that reservations follow the same policy procedures as laid out by Society travel reimbursement policy outlined by *Appendix D in Regional Operations Manual*. All claims should be submitted to ASHRAE's comptroller within 30 days of the travel date. Claims submitted after 90 days will not be reimbursed (see Society Transportation Reimbursement Voucher, page 2, Documentation).
- b. Regional Reimbursed Expenses
 - i. Only official chapter visits coordinated with the DRC shall be reimbursed.

- ii. Total annual reimbursement for any Regional representative shall not exceed the amount set forth in the budget and approved by the CRC and shall only be used to cover the expenses outlined below.
- iii. Hotel – Many chapter visits can be completed without incurring an overnight expense, however, should one be required, the Regional representative will do their best to minimize expenses to the Region while ensuring their comfort and safety in a reasonable accommodation. It is recommended that Regional officers seek the advice of a local chapter representative when making hotel arrangements. Hotel reimbursements will NOT be made for more than one night except for extreme cases such as travel that cannot be reasonably completed in one night and allow the regional officer to complete their business efficiently (i.e. travel to and from Hawaii) and those exceptions must have prior DRC approval prior to completing travel.
- iv. Ground Transportation – Host chapter is responsible for providing ground transportation at destination chapter. Rental cars will not be reimbursed. Should the welcoming chapter not be able to provide ground transportation due to extenuating circumstances, reasonable taxi or public transportation receipts will be considered for reimbursement. Regional officers are guests to the chapters and should be treated as such by host chapters – this includes accommodating ground transportation and chapter should be reminded of such.
- v. Ground Transportation/Parking at Regional representative's home location – Regional representatives should consider multiple options such as public transportation, carpooling, taxi, ride-sharing, or airport parking to find the most financially efficient solution for their departure location.
- vi. Miscellaneous Costs – Host chapters should not charge regional officers meeting costs for attending chapter meetings, therefore this is not a reimbursable expense. Likewise, meals and other incidentals occurred while traveling on behalf of the region are not to be reimbursed by the region.

IV. President Elect Training/Regional Planning Meeting (PET/RPM)

- a. Society Allocations – The DRC shall determine how many region allocated visits shall be used for the Regional Planning Meeting. Society will reimburse for transportation expenses only, provided that transportation reservations are made in accordance with the Society travel reimbursement policy. Should the region exceed the number of society allocated chapter visits, Region will reimburse transportation expenses for attending the PET/RPM provided that reservations follow the same policy procedures as laid out by Society travel reimbursement policy outlined by *Appendix D in Regional Operations Manual*. All claims should be submitted to ASHRAE's comptroller within 30 days of the travel date. Claims submitted after 90 days will not be reimbursed (see Society Transportation Reimbursement Voucher, page 2, Documentation).
 - i. Transportation reimbursement is available for the following individuals:

1. Director and Regional Chair (DRC)
2. Region Members Council Representative (RMCR)
3. Five(5) Regional Vice Chairs (RVC) of:
 - a. Chapter Technology Transfer
 - b. Membership Promotion
 - c. Research Promotion
 - d. Student Activities
 - e. Grassroots Government Activities
4. YEA Regional Coordinator
5. Region-At-Large Sub-Region Chairs
6. Nominating Committee Member
7. Nominating Committee Alternate
8. Nominating Reserve
9. Regional Historian
10. CRC General Chair
11. Regional Treasurer
12. Additional person at the discretion of DRC

NOTE: The *incoming and outgoing* DRCs and RVCs are to attend the regional planning meeting. The newly elected incoming Nominating Committee Member, Nominating Committee Alternate and Nominating Committee Reserve shall also attend the regional planning meeting if deemed necessary.

b. Regional Reimbursed Expenses

- i. Only the expenses outlined below shall be reimbursed, with reimbursement of each category not to exceed the amount set forth in the budget and approved by the CRC.
- ii. Hotel – On most occasions, a single night hotel will be required. One night accommodations will be reimbursed for Regional representatives at a pre-approved/designated hotel at the standard room rate.
- iii. Ground Transportation – Ground transportation at the location of the meeting to be coordinated by the DRC prior to the Regional Planning Meeting (typically a shuttle or cab) with expenses to the region.
- iv. Ground Transportation/Parking at Regional representative's home location – Regional representatives should consider multiple options such as public transportation, carpooling, taxi, ride-sharing, or airport parking to find the most financially efficient solution for their departure location.
- v. Miscellaneous Costs – Meals that are not provided as a part of the business day and other incidentals are the responsibility of the individual and shall not be reimbursed by the region.

V. CRC (Chapters Regional Conference)

- a. Society Reimbursed Expenses

i. Transportation Policy is outlined by *Appendix D in Regional Operations Manual*. All claims should be submitted to ASHRAE's comptroller within 30 days of the travel date. Claims submitted after 90 days will not be reimbursed (see Society Transportation Reimbursement Voucher, page 2, Documentation). Transportation reimbursement by Society is available for the following individuals:

1. Director and Regional Chair (DRC)
2. Region Members Council Representative (RMCR)
3. CRC General Chair
4. Chapter Delegate
5. Chapter Alternate
6. Nominating Committee Member
7. Nominating Committee Alternate
8. Nominating Reserve
9. Five(5) Regional Vice Chairs (RVC) of:
 - a. Chapter Technology Transfer
 - b. Membership Promotion
 - c. Research Promotion
 - d. Student Activities
 - e. Grassroots Government Activities
10. YEA Regional Coordinator
11. Regional Historian
12. Regional Treasurer

b. Regional Reimbursed Expenses

- i. Only the expenses outlined below shall be reimbursed, with reimbursement of each category not to exceed the amount set forth in the budget and approved by the CRC.
- ii. Registration – Most Regional Officers will be required to participate in all events including the Welcome Dinner, Awards Dinner, President's Luncheon, and Workshops, thus requiring the full package which will be reimbursed by the Region. Note that you **MUST** attend all functions in order to receive full reimbursement and should you fail to participate and attend all CRC functions your reimbursement could be offset accordingly.
- iii. Hotel – On most occasions, three nights hotel accommodations will be reimbursed for Regional representatives at the pre-approved/designated CRC hotel at the standard room rate.
- iv. Ground Transportation – Regional representatives should consider multiple options such as public transportation, carpooling, taxi, ride-sharing, or parking to find the most financially efficient solution at the location of the CRC.
- v. Ground Transportation/Parking at Regional representative's home location – Regional representatives should consider multiple options such as public transportation, carpooling, taxi, ride-sharing, or airport

parking to find the most financially efficient solution for their departure location.

- vi. Miscellaneous Costs – Meals and other incidentals are the responsibility of the individual and shall not be reimbursed by the region. Exceptions may be made on a case-by-case basis at the discretion of the DRC.

VI. Society Annual/Winter Meeting

a. Society Reimbursed Expenses

- i. Transportation Policy is outlined by *ASHRAE Travel Reimbursement Policy and ASHRAE Society Rules and Regulations –Committee Service*. All claims should be submitted to ASHRAE's comptroller within 30 days of the travel date. Claims submitted after 90 days will not be reimbursed (see Society Transportation Reimbursement Voucher, page 2, Documentation). Reimbursement for transportation is available to the following people:
 - 1. Director and Regional Chair (DRC)
 - 2. Region Members Council Representative (RMCR)
 - 3. Nominating Committee Member
 - 4. Nominating Committee Alternate
 - 5. Nominating Reserve
 - 6. Five(5) Regional Vice Chairs (RVC) of:
 - a. Chapter Technology Transfer
 - b. Membership Promotion
 - c. Research Promotion
 - d. Student Activities
 - e. Grassroots Government Activities
 - 7. YEA Regional Coordinator
- ii. Transportation to the Annual Meeting will also be reimbursed by Society for both *incoming and outgoing* DRC, RMCR, and RVCs.
- iii. Regional Historian and Regional Treasurer are not currently reimbursed by Society per the Rules of the Board.

b. Regional Reimbursed Expenses

- i. Only the expenses outlined below shall be reimbursed, with reimbursement of each category not to exceed the amount set forth in the budget and approved by the CRC.
- ii. Registration – The reduced registration cost for the DRC shall be reimbursed by the region. Registration to Society Annual and Winter meetings for all other regional officers is NOT reimbursed by Society nor Region X. Individuals are responsible for their own conference registration fees.
- iii. Hotel – Where attendance is required and/or approved in the regional budget, hotel expenses will be reimbursed by Regional position, for the following maximum number of nights:

Annual Meeting:

2 nights- Nominating Committee Member, Nominating Alt. or Reserve, Regional Treasurer & Regional Historian.

3 nights- RVCs for RP, GGAC & CTTC, YRC Chair

4 nights- RVCs for MP, SA, (this includes centralized training for MP & SA)

5 nights- RMCR

Winter Meeting:

2 nights- Nominating Committee Member, Nominating Alt. or Reserve, Regional Treasurer & Regional Historian.

3 nights- RVCs for MP, RP, GGAC, CTTC, YRC Chair

4 nights- SA RVC,

5 nights- RMCR

The region will reimburse for additional night(s) only when preapproved in the budget. Regional representatives are encouraged to investigate other local discounted lodging options as well.

- iv. Ground Transportation at the location of the meeting – Society often arranges shuttles/discount ground transportation arrangements to/from the airport and the host hotel – it is highly recommended that Regional representatives utilize this courtesy or public transportation.
- v. Ground Transportation/Parking at Regional representative's home location – Regional representatives should consider multiple options such as public transportation, carpooling, taxi, ride-sharing, or airport parking to find the most financially efficient solution for their departure location.
- vi. Miscellaneous Costs – Meals and other incidentals are the responsibility of the individual and shall not be reimbursed by the region. Exceptions may be made on a case-by-case basis at the discretion of the DRC.
- vii. Travel for the Regional Historian and Regional Treasurer are not currently reimbursed by Society and any Region reimbursement shall be proposed CRC and included in the Regional budget. If not included in the budget, the Region shall not reimburse for travel.

VII. Miscellaneous Regional Travel

a. Centralized Training

i. Society Reimbursed Expenses

- 1. Transportation Policy is outlined by Appendix D in Regional Operations Manual. All claims should be submitted to ASHRAE's comptroller within 30 days of the travel date. Claims submitted after 90 days will not be reimbursed (see Society Transportation Reimbursement Voucher, page 2,

Documentation).

ii. Regional Reimbursed Expenses

1. Only the expenses outlined below shall be reimbursed, with reimbursement of each category not to exceed the amount set forth in the budget and approved by the CRC.
2. Hotel – If hotel is not covered by the Standing Committee travel policy then the Region will cover two nights of hotel expense at the hotel where the training is taking place.
3. Ground Transportation – Regional representatives should consider multiple options such as public transportation, carpooling, taxi, ride-sharing, or parking to find the most financially efficient solution at the location of the meeting.
4. Ground Transportation/Parking at Regional representative's home location – Regional representatives should consider multiple options such as public transportation, carpooling, taxi, ride-sharing, or airport parking to find the most financially efficient solution for their departure location.
5. Miscellaneous Costs – Meals and other incidentals are the responsibility of the individual and shall not be reimbursed by the region. Exceptions may be made on a case-by-case basis at the discretion of the DRC.

b. Members Council Meetings

i. Society Reimbursed Expenses

1. Transportation Policy is outlined by Appendix D in Regional Operations Manual. All claims should be submitted to ASHRAE's comptroller within 30 days of the travel date. Claims submitted after 90 days will not be reimbursed (see Society Transportation Reimbursement Voucher, page 2, Documentation).

ii. Regional Reimbursed Expenses

1. Only the expenses outlined below shall be reimbursed, with reimbursement of each category not to exceed the amount set forth in the budget and approved by the CRC.
2. Hotel – If hotel is not covered by the Standing Committee travel policy then the Region will cover two nights of hotel expense at the hotel where the training is taking place.
3. Ground Transportation – Regional representatives should consider multiple options such as public transportation, carpooling, taxi, ride-sharing, or parking to find the most financially efficient solution at the location of the meeting.
4. Ground Transportation/Parking at Regional representative's home location – Regional representatives should consider multiple options such as public transportation, carpooling, taxi, ride-sharing, or airport parking to find the most financially efficient solution for their departure location.
5. Miscellaneous Costs – Meals and other incidentals are the

responsibility of the individual and shall not be reimbursed by the region. Exceptions may be made on a case-by-case basis at the discretion of the DRC.

c. Nominating Committee Meetings

i. Society Reimbursed Expenses

1. Transportation Policy is outlined by Appendix D in Regional Operations Manual. All claims should be submitted to ASHRAE's comptroller within 30 days of the travel date. Claims submitted after 90 days will not be reimbursed (see Society Transportation Reimbursement Voucher, page 2, Documentation).

ii. Regional Reimbursed Expenses

1. Only the expenses outlined below shall be reimbursed, with reimbursement of each category not to exceed the amount set forth in the budget and approved by the CRC.
2. Hotel – If hotel is not covered by the Standing Committee travel policy then the Region will cover two nights of hotel expense at the hotel where the training is taking place.
3. Ground Transportation – Regional representatives should consider multiple options such as public transportation, carpooling, taxi, ride-sharing, or parking to find the most financially efficient solution at the location of the meeting.
4. Ground Transportation/Parking at Regional representative's home location – Regional representatives should consider multiple options such as public transportation, carpooling, taxi, ride-sharing, or airport parking to find the most financially efficient solution for their departure location.
5. Miscellaneous Costs – Meals and other incidentals are the responsibility of the individual and shall not be reimbursed by the region. Exceptions may be made on a case-by-case basis at the discretion of the DRC.

VIII. Employer Support Recognition

- a. At the end of each Society year the DRC will write a letter to the employer of each Regional representative in recognition of their financial support of Region X activities by way of travel allocations, time expenditures and employee dedication.

Note: All exceptions defined above for the DRC shall be made by the Regional Treasurer.