

PMI PHOENIX CHAPTER POLICY STATEMENT

Travel Reimbursement Policy

Approved by Board of Directors on: 3/25/19

Purpose

The PMI Phoenix Chapter (PMI PHX) has established this policy in order to provide the Directors and volunteers (traveler) with a guide to understand the Policies and Procedures relating to reimbursable business travel performed on behalf of the chapter. The policy describes the processes and forms to be used by Directors and volunteers when traveling on PMI Phoenix Chapter approved business.

Travel Reimbursement Rate Schedule

PMI Phoenix Chapter travel is approved by the President. In the cases where individual travel is required, the travel request is submitted via e-mail to the President for approval. Actual expenses incurred within the approval limits are reimbursed. Expenses incurred outside this policy are at the discretion of the President.

Travel Status

Travelers are in travel status when they are on PMI Phoenix Chapter business and more than 100 miles from their workplace or place of residence. Travelers can be reimbursed for mileage, tolls, and/or parking costs but will not be allowed meals or lodging within 100 miles of their workplace or place of residence. If a Director or volunteer is in travel status for less than 100 miles, meals and/or lodging are not allowed regardless of the distance traveled, unless approved by the VP of Finance or President.

Reimbursements for Meals and Reception

There may be instances where PMI Phoenix Chapter Directors or volunteers meet with persons during a meal, conference, or reception where the Director may purchase food or beverages, excluding alcohol, in consort with the activity. Directors or volunteers can be reimbursed for meal expenses within prescribed limits (see Per Diem Meal Rates). The PMI Phoenix Chapter will only pay for food and beverage costs, excluding alcohol, of other persons involved in the meeting, conference or reception at the discretion of the Board delegate and within the established budget, or with the approval of the VP of Finance or President.

Reimbursement for meals that are included as part of an event-registration fee are not reimbursable.

Per Diem Meal Rates

PMI Phoenix Chapter uses the GSA per diem rates for meals. The current GSA rates are available at <http://www.gsa.gov/portal/category/21287>. This table provides the daily rates for M&IE (meals & incidental expenses) specific to the location where the event is located. Daily expenses beyond the M&IE rates for the location will not be reimbursed without approval of the Board delegate, or prior approval of the VP of Finance or President.

In instances where the event fee includes some but not all daily meals (breakfast, lunch or dinner), the GSA has an apportioned rate for each meal based on the daily rate for the location. The apportioned meal rates can be found at <http://www.gsa.gov/mie>.

Air Travel

Air travel will be scheduled only when it is clearly in the best interest of the PMI Phoenix Chapter and is more cost effective than other means of travel. Travelers will avail themselves of special cost-saving airline fares whenever possible (such as Saturday overnight stays). In all cases, the traveler will seek the lowest cost coach fares and plan trips well in advance to ensure the most direct and the lowest fares available. Tickets for travel will be purchased at least two weeks prior to the event unless approved by the President. When a traveler, for his or her convenience, travels by an indirect route or interrupts PMI Phoenix Chapter

business-related travel, the additional expenses are the responsibility of the traveler. No transportation costs will be allowed between a traveler's residence and his or her workplace. PMI Phoenix Chapter does not does not reimburse for spousal accompaniment. Travelers should consider personal-vehicle mileage costs associated with using alternate airports and additional lodging and per diem costs associated with special rates (such as Saturday overnight stays).

Traveler's will be provided a travel budget for airfare and will be required to stay within that budget when purchasing tickets. If the budget is exceeded, the traveler must get approval from the President prior to incurring the cost and/or will be responsible for the amount over the published limit.

Travel between Residence and Airport

Travelers will be reimbursed for the following travel expenses incurred between residence and transportation terminals (bus stations, airports, etc.) when travelling for PMI Phoenix Chapter business needs and events:

- Actual cost incurred for bus or taxi/Uber. Tips will be included in the charges.
- Personal car mileage at the existing IRS mileage rate plus tolls and parking will be reimbursed and the traveler must provide receipts or supporting documentation to be reimbursed.

Rental Vehicles

Rental vehicles will be used when the trip destination is over 100 miles from the airport terminal and/or no prior arrangements have been made for ground transportation. The PMI Phoenix Chapter does not have a contract with any particular rental agency. The following guidelines should be utilized when renting a vehicle:

- Within 500 miles a compact vehicle will be rented.
- Over 500 miles, a compact or mid -size vehicle will be rented.
- No upgrades will be allowed unless there are specific mitigating circumstances to support the upgrade. All upgrades must have the prior approval of the President. Availability of funds will not be an adequate reason for an upgrade.
- Receipts will be obtained by the traveler for gasoline, insurance, tolls, or other expenses associated with the vehicle. The receipts will be submitted with the traveler's expense report and reimbursement will be made for appropriate items.
- The vehicle will be provided to the traveler with a certain level of gas that will be noted at the time the traveler accepts the vehicle. It is expected that the traveler returns the vehicle with the same level of gasoline in the tank, and if there is an extra charge it will not be reimbursed
- Premiums for any additional insurance will be reimbursed if the traveler deems necessary. If the traveler's personal liability coverage covers rental cars, then the traveler can opt-out of the rental car insurance policy. If the traveler does not have personal liability insurance coverage, then rental car insurance is mandatory.
- Traveler must have a valid driver's license.

The traveler signing the vehicle rental agreement accepts responsibility for the operation of the vehicle during the rental period. The vehicle will be operated only for official PMI Phoenix Chapter business or for the necessary incidentals (such as driving to the conference or hotel) related to the purpose of the trip. Under no circumstances will the vehicle be used for personal use or for travel not associated with PMI Phoenix Chapter business.

Personal Vehicles

Travelers are in "travel status" when they are on PMI Phoenix Chapter business and more than 100 miles from their workplace or place of residence. When a privately-owned vehicle is used for PMI Phoenix Chapter business, the traveler will be reimbursed at the current approved IRS mileage rate.

Reimbursement is allowed for all travel necessary to accomplish the purpose of the trip. When a traveler uses a personal car on PMI Phoenix Chapter business and is involved in an accident, the traveler's

insurance provides the primary source of coverage. The current GSA rate for reimbursement of personal vehicle usage can be found at <http://www.gsa.gov/mileage>.

Lodging

Travelers will be reimbursed for hotel stays and lodging based on the approved budget. PMI Phoenix Chapter Directors attending the annual PMI North American Leadership Institute Meeting or the annual PMI Region 7 Summit / Conference are authorized to stay at the event conference center. Travelers should check the conference center for special rates that may result in lower-lodging expenses. For other authorized PMI Phoenix Chapter travel, reimbursement while travelling out of the local area will be reimbursed based on the GSA lodging guidelines for the location. GSA Lodging rates can be found at <http://www.gsa.gov/portal/category/21287>.

Incidental Travel Expenses

Internet access and fax charges are not reimbursable by the PMI Phoenix Chapter unless it is for PMI Phoenix Chapter business.

Laundry, valet service, theater, banquet tickets and entertainment are considered personal items and will not be reimbursed.

Receipts

Receipts for hotel, airfare, ground transportation/parking and meals **are mandatory for reimbursement** by the PMI Phoenix Chapter per the Expense Reporting Process.

Expense Reports

Expense reports for all travel will be submitted to the VP of Finance using the standard PMI PHX Expense Report. Expense reports will be submitted within two weeks of the completion of the travel. The current version of the expense report (an excel spreadsheet) can be found by clicking [PMI PHX Expense Reimbursement Form](#)

Reimbursements in Advance of Travel

In instances where advance purchases are required (early-event registration, airline ticket purchases, etc), the traveler may request an early reimbursement by providing a copy of the receipt to the VP of Finance.

Expense Reimbursement Submissions

PMI Phoenix Chapter Officers and Volunteers can submit their scanned expense receipts and expense reports to the VP Finance directly, or via [Expense Report and Receipts Submission link](#). (Please inform the VP Finance that you have uploaded an expense report as there is no alert system signaling a new submission.