

Project Management Institute, Tallahassee, Florida Chapter Travel Reimbursement Policy

1. **TRAVEL REIMBURSEMENT POLICY.** The policy of the Project Management Institute, Tallahassee, Florida Chapter, Inc. (“the Chapter”) is to reimburse individuals for approved, reasonable, and necessary travel expenses incurred in conjunction with approved initiatives of the Chapter. It is the Chapter’s policy that all travel be conducted in the least expensive manner.
 - 1.1. **Approved Travel** is travel expenses that are preapproved by the Chapter President and either one or both the V.P. Programs and the V.P. Professional Development depending on the engagement.

2. **LONG DISTANCE TRAVEL**
 - 2.1. **Mileage Reimbursement.** The Chapter will reimburse mileage in a privately owned vehicle, and related tolls and parking. Mileage costs will be reimbursed at the current IRS approved rate for business miles driven.
 - 2.2. **Parking and tolls.** The Chapter will reimburse for parking and tolls associated with a long distance trip. Parking and Tolls totaling more than \$10 must have a receipt.
 - 2.3. **Air Travel.** The Chapter will pay for airfares to approved destinations. Travelers must use the lowest available airfare. Travelers will be reimbursed for special promotional tourism or economy fares as long as these fares do not exceed the lowest available coach fares. Airline tickets in excess of \$500.00 must be approved by the Chapter’s board of directors prior to travel. First class, international, and spouse travel is not reimbursable. In cases where cancellation fees/penalties are incurred as a result of a change of plans, the fees will be reimbursed if there is a valid business reason for the change of plans. Acceptable business reasons include the organization canceling or altering the trip or delays in flight connections. This explanation should be attached as documentation with the travel expense report. In instances where these fees/penalties are incurred without adequate explanation, the cost of the fees/penalties will not be reimbursed.
 - 2.4. **Lodging Costs.** Accommodations that meet business and personal needs, and offer good value should be selected whenever possible. Travelers should use standard single room accommodations at medium range hotels not to exceed \$105 per day rate. The additional cost of room upgrades (e.g.; suite, executive floor room with a view, etc) is not reimbursable. Receipts for all lodging must be attached to the expense report and itemized by expense category (meals, telephone, parking, etc.). Travelers will be reimbursed for actual lodging costs. Project Management Institute, Tallahassee, Florida Chapter
 - 2.4.1. **Hotel Phone Surcharges.** Personal phone calls to the Traveler’s home are not reimbursable. Only Chapter related calls are reimbursable. Travelers should use the hotel’s long distance phone service only as a last resort because hotel surcharges can be as much as 100% of the actual cost of the call.
 - 2.5. **Meals.** Meal reimbursement includes breakfast, lunch and dinner. Excluded are alcoholic beverages, entertainment expenses and other types of personal expenses not relating to these specific meals. Reimbursement is not to exceed \$50 per day.
 - 2.6. **Automobile Rental.** Automobiles should be rented only when the cost advantages are clearly justified (i.e. the cost of the rental car would be less than using taxis, etc.). Travelers are expected to use one of the lower cost car rental

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firms. All rental car receipts received by the traveler must be submitted with the expense report.

- 2.7. **Ground Transportation.** Generally, the Chapter prefers to pick speakers up at the airport. If this is not possible, taxicabs are usually the lowest cost and preferred method of ground transportation.
3. **NON-REIMBURSABLE EXPENSES.** Non-reimbursable expenses are identified throughout this policy. The following items are typically non-reimbursable expenses:
 - 3.1. First class, spouse and international travel
 - 3.2. Upgrades to air travel, car rentals, or hotel rooms
 - 3.3. Purchase of clothing, luggage, toiletries and other miscellaneous personal items
 - 3.4. Supplemental travel or car rental insurance
 - 3.5. Fines, penalties, or legal fees
 - 3.6. Personal entertainment or recreational expenses
4. **EXPENSE REPORTING & Reimbursement Approval Process**
 - 4.1. **Reimbursement Approval Process.** Expenses will first be reviewed and approved by the V.P.(s) handling the engagement. Most often this will be the V.P. Programs and/or the V.P. Professional Development. Once approved by the appropriate V.P., that V.P. will turn the expense report over to the President or President Elect for final approval. Then the President will request that the V.P. of Financial Affairs prepare a check.
 - 4.2. **Receipt Requirements.** All expenses submitted for reimbursement must be substantiated with receipts. The Chapter prefers that all receipts be imaged and submitted with a completed Chapter Travel Reimbursement form. In the event that it is impractical to obtain a required receipt or if such receipt has been inadvertently destroyed, the traveler should furnish a written statement to that effect, as well as an explanation of the expenditure involved.
 - 4.3. **Timely Submission of Report.** The suggested timeframe for expense report submission is within two weeks of travel. Travel & Expense Reports filed more than 60 calendar days after expenses are incurred will not be reimbursed without the approval of the President and the V.P. for Programs, and when appropriate, the V.P. for Professional Development.
 - 4.4. **Tips to Expedite Payment of Travel & Expense Report.** These TIPS are designed to help all travelers. Please refer to the Travel Policy above for specific information.
 - 4.4.1. Written explanations are needed for missing receipts or exceptions to the policy.
 - 4.4.2. Ensure the Traveler Name and purpose of trip are clearly identified.
 - 4.4.3. Expense reports should follow a logical order and itinerary and travel must match.
 - 4.4.4. Parking or Tolls adding up to more than \$10 must have receipts.
 - 4.4.5. Hotel bills need to be itemized by meals, telephone, parking, etc.
 - 4.4.6. Keep copies of all Expense Reports with receipts for your records.