

Policy Statement:

The PMI Pikes Peak Regional Chapter (PMI PPRC) has established this policy in order to provide the Officers 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 Officers and Volunteers when traveling on PMI Pikes Peak Regional Chapter approved business.

Travel Reimbursement Rate Schedule:

PMI Pikes Peak Regional 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.

Travel Status:

Travelers are in travel status when they are on PMI Pikes Peak Regional Chapter business and more than 35 miles from their workplace or place of residence. Travelers can be reimbursed for mileage, tolls, or parking costs but will not be allowed meals or lodging within 35 miles of their workplace or place of residence. If an Officer or Volunteer is in travel status for less than three hours, 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 Pikes Peak Regional Chapter Officers or Volunteers meet with persons during a meal, conference, or reception where the officer may purchase food or beverages, excluding alcohol, in consort with the activity. Officers or volunteers can be reimbursed for meal expenses within prescribed limits (see Per Diem Meal Rates). The PMI Pikes Peak Regional 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 portfolio leader 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 Pikes Peak Regional 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 that the event is in. Daily expenses beyond the M&IE rates for the location will not be reimbursed without approval of the portfolio leader, 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 Pikes Peak Regional 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 permit full use of lower fares. Travel must be by the most direct and cheapest route possible. Tickets for travel will be purchased at least two weeks prior to the

event unless approved by President. A person traveling by an indirect route not associated with the purpose of the trip will personally assume any extra costs incurred. No transportation costs will be allowed between a traveler's residence and his or her workplace.

Travelers should consider personal vehicle mileage costs associated with using alternate airports and additional lodging and per diem costs associated with some special rates (such as Saturday overnight stays)

Travelers 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 Pikes Peak Regional Chapter business needs and events:

1. Actual cost incurred for bus or taxicab. Tips will be included in the taxicab charges.
2. 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 Pikes Peak Regional Chapter does not have a contract with any particular rental agency.

1. Within 500 miles a compact vehicle will be rented.
2. Over 500 miles, a compact or mid size vehicle will be rented.
3. 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.
4. 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.
5. 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 return the vehicle with the same level of gasoline in the tank.
6. Premiums for any additional insurance will be reimbursed if the traveler deems necessary.
7. 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 Pikes Peak Regional 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 Pikes Peak Regional Chapter business.

Travel Reimbursement Policy
Policy ID: FIN001
Status: draft
Date: January 9, 2011

Personal Vehicles:

Travelers are in travel status when they are on PMI Pikes Peak Regional Chapter business and more than 35 miles from their workplace or place of residence. When a privately owned vehicle is used for PMI Pikes Peak Regional 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 Pikes Peak Regional 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 Pikes Peak Regional Chapter officers attending the annual PMI North American Leadership Institute Meeting or the annual PMI Region 6 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 Pikes Peak Regional 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 Pikes Peak Regional Chapter unless it is for PMI Pikes Peak Regional 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 Pikes Peak Regional 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 PPRC 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 [here](#).

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.

Definitions:

Portfolio Leader	If the PPRC President or VP of Finance are not in attendance at the event, this is the person designated by the chapter president as the lead representative for the Pike Peak Regional Chapter.
-------------------------	--



Travel Reimbursement Policy
Policy ID: FIN001
Status: draft
Date: January 9, 2011

Associated Procedures:

Step	Title	Purpose / Description
1	PMI PPRC Expense Report	Documenting and submitting travel expenses for reimbursement

References:

None.