IIA PHOENIX CHAPTER TRAVEL EXPENSE REIMBURSEMENT POLICY

The purpose of this document is to provide Chapter policy for reimbursing individuals (i.e. Speakers, Chapter Leaders and other authorized travelers on business travel) for travel expenses incurred for IIA business.

Chapter policy is to reimburse individuals for all ordinary, necessary, and reasonable travel expenses. When submitting expense reports for reimbursement, individuals are expected to neither lose nor gain financially. Individuals should keep in mind that when travel is required, it is their responsibility to avoid unnecessary expenses.

Travel Pre-Authorization
Travel plans should be pre-authorized by the President or his/her designee. An estimate of travel expenses to be incurred should be prepared so that comparison to budgeted amount can be completed. Travel involving the President should be reviewed by an independent officer. If travel involves all officers, an independent Board member should review the travel plan and estimated expenses.

Documentation Requirements
Individuals should submit travel expenses for reimbursement within a reasonable timeframe (generally, no more than 10 days) from the conclusion of the event. Receipts are required for all expenses greater than $25 along with any other supporting documentation stated in these guidelines (i.e., itinerary, etc.); however, individuals should submit all receipts whenever available to support expenses incurred. Just the credit card receipt is not sufficient. A detailed receipt of the expense is required. Expense reports and receipts may be submitted electronically.

Transportation
- Coach round trip airfare, via the lowest cost carrier, from the participant's city of residence to the event/meeting location, will be reimbursed. Costs that should generally not be reimbursed include:
  - Flight upgrades to the exit row, business class, first class etc.
  - Baggage fees, unless multiple nights of travel are required
  - Expenses associated with changing a flight
- The airline passenger receipt (usually the last page of the ticket packet) or the e-ticket, and the travel itinerary must be submitted as documentation to support air travel.
- If an individual desires to use a personal automobile instead for transportation between their home base and the event/meeting location, expenses will be reimbursed at the IRS mileage rate for the current year. The amount reimbursed will not exceed the cost of the available air coach transportation.
- Expenses related to parking or transportation to/from the airport or hotel are reimbursable.
- Rental cars may be used when other means of transportation are unavailable, more costly, or impractical. The use of a rental car must be justified as a business need and not as a matter of personal convenience. Other considerations for rental cars include:
  - All rentals should be for intermediate-size cars or smaller. Travelers should share cars to minimize costs when traveling in groups. Three or more people traveling together may rent a larger car.
  - Travelers are required to refuel rental cars prior to return to avoid gasoline-refueling charges at the rental location.
**Hotel**
- The cost of a standard, single room at the event's hotel or recommended hotel beginning the night prior to meeting until the night before the last day of the event, for the attendee only (one guest), will be reimbursed.
- Additional hotel charges for nights stayed following the conclusion of the event must be the responsibility of the individual. Any additional room charges for accompanying guests must be paid for by the individual.
- Certain expenses, such as premium movie channels, health club usage, and recreation fees, are the responsibility of the individual and are not reimbursable expenses.
- Early or late departure fees must be the responsibility of the individual.
- An itemized guest folio with zero ending balance must be included with the expense reimbursement report.

**Business Meals**
- The reasonable cost of business meals when they are "directly related to" or "associated with" the conduct of business, should be reimbursed. The following amounts (which include meal and tip) are deemed generally to be reasonable:
  - Breakfast - $15.00
  - Lunch - $25.00
  - Dinner - $50.00
- Expenses deemed lavish or extravagant will not be reimbursed. For example, meals will not be reimbursed if a meal is also being provided by the IIA.
- Receipts for meals must be supported by a detailed receipt and not just a credit card receipt. Restaurant check pull-off stubs are not considered acceptable receipts.
- Reimbursement request must contain the business purpose for the meal, and who attended the meal.

**Other Miscellaneous Items**
- Basic Wi-Fi expense (not enhanced/high-speed) for a reasonable duration while the individual is traveling on business.
- When required for services performed (e.g. restaurant servers and taxi or shuttle drivers), reasonable tips will be reimbursed up to a maximum of 20%.

**Expenses Not Eligible for Reimbursement**
Examples include, but are not limited to, the following:
- Travel expenses over $25 without a detail receipt (not just the credit card receipt)
- Spouse or companion expenses (meals, hotel charges, etc.)
- Alcoholic beverages (with the exception of a maximum of one drink included with dinner)
- Boarding for personal pets
- Limo Service or Parking/Traffic Violations
- Personal Entertainment or Recreation
- Personal Items (i.e. clothing, clothing rental, hair dryers, toiletries, dry-cleaning, etc.)

**Expense Statement Approval**
As with any other Chapter expense, expense statements must be approved by the President before payment is issued. Expense statements of the President must be reviewed by an independent officer.
that was not involved in the travel or expense. If the travel or expense involved all of the officers, then
the expense statement must be reviewed by a Board member.

Any exceptions to these guidelines must be approved by the Chapter President and/or Chapter Treasurer.

Policy Revision 0 (Initial)
Approved by the Board Of Governors _2/25/2020 during Q3 Board Meeting____________________