

REGION 6

TRAVEL EXPENSE REIMBURSEMENT POLICY

SUMMARY

General

1. Refer to Region 6 Policy on Travel Reimbursement if in doubt.
2. Reimbursements are for authorized delegates and invitees only.
3. Region 6 funds are for assistance only - solicit your company's support.

Expense Claims

1. Always use the latest IEEE expense form with major item receipts and vouchers attached.
2. Claims more than 30 days after travel may be disallowed.
3. Submit claims to Area Chairmen for Area meeting expenses verification (except for Region 6 Executive Committee members).
4. Submit claims for Student Activities meeting expenses to the Student Activities Chairman's approval.
5. Submit all A-95 forms directly to the Region 6 Treasurer for payment.

Region Meetings

1. Region 6 Regional Committee travel expenses must be approved, in advance, by Region 6 Treasurer for nonmembers or unauthorized delegates.
2. Travel advances for members must receive Region 6 Director approval.

Area Meetings

1. Attendance is by invitation only.
2. Region 6 Director approval is required for expenses estimated to exceed Area budget.

Student Activity Committee Meetings

1. Student Activities Chairmen will decide the number of days authorized for meeting (two days maximum).
2. Authorizations for more than one day must be made in advance.
3. Air travel is not authorized for student meetings.
4. Auto mileage reimbursement requires at least three students per vehicle.
5. Hotel rooms to be reimbursed should be occupied by two students, if appropriate.

REIMBURSEMENT POLICY AND LIMITS

Airline Costs

1. Round trip expenses to meeting location only.
2. Request lowest fare policy.
3. Make reservations at least two weeks but preferably one month in advance.
4. Air travel reimbursement requests must include the original passenger receipt from ticket (red carbon when ticket is handwritten).

Hotel Costs

1. Stay at hotels recommended by organizer, unless you get cheaper rates elsewhere.
2. Added hotel expenses for spouse are not authorized.
3. Submit hotel, meal, and local transportation receipts with A-95 form.

Car Rentals

1. Car rental expenses require advance approval from Region 6 Director, unless you can demonstrate savings to IEEE by using a rental car.
2. The reason for using a rental car and a statement of the cost savings must be attached to your expense report.

Personal Auto Expense

1. Travel over 50 miles is reimbursed at 44.5 cents per mile up to a maximum of least expensive air fare between points or equivalent if air service does not exist.
2. Only one person in auto may claim personal mileage reimbursement.

REGION 6

POLICY FOR REIMBURSEMENT OF TRAVEL EXPENSES

General Policy

1. Travel by volunteers is necessary for certain Region 6 activities. At the same time, it is clear that Region 6 resources cannot support all of the travel that is desirable. In order to use the Institute's limited travel resources effectively, these guidelines, based on the IEEE Travel Reimbursement Procedures Manual, apply.

2. Expenses for travel to any Region 6 meeting are reimbursed only for authorized delegates or invited attendees.

3. The Region budget includes limited funds for expenses related to meetings on Region 6 business. These funds are intended only to assist when it is vital for a member of the Region to attend and they have no other source of compensation for their expenses. The budget could not possibly survive reimbursement of all attendees at the various meetings. Region members are therefore urged to solicit the support of their companies and/or local sections in providing all, or part of, the necessary travel expenses. If everyone adheres to these recommendations, more IEEE members will be able to participate in regional activities.

Expense Claims

1. Expense claims must be submitted on IEEE Form A-95 (Region Expense Report) signed by the individual. Whenever vouchers or receipts are normally provided, they must be submitted with the claim. In the event that required receipts cannot be obtained, the "Unsupported Travel Expense" form must be submitted (see Addenda).

2. Turn in the expense form within one week after the travel has been completed. Extenuating circumstances, such as your company sharing some of the expenses, are acceptable for turning in the form late. Expenses submitted after 30 days may not be honored.

3. Submit the form directly to the Region 6 Treasurer, except when otherwise directed (see Area meeting and Student Activities Committee meeting). These will be audited for acceptance per this.

4. In some cases, the reimbursement will not cover all related expenses. However, by obtaining company support, or by assuming some minor share of the expenses and

working together, we can all make it possible for dedicated people to serve the IEEE without a large personal sacrifice.

Specific Policies for Region 6 Meetings

1. Regional Committee Meeting, held annually in accordance with the bylaws.

The attendee must be a member (or an authorized delegate) of the Region 6 Regional Committee. If not, advance approval for reimbursed attendance must be obtained from the Treasurer, who acts for the Region Director.

If deemed necessary by the Regional Director, advance cost authorization may be required of all members. If the total exceeds budget limits, a pro rata percentage reduction of all claims may be made by advance notification to attendees.

2. Area Meetings.

Authorization to attend must be made by invitation or approval of the Area Chairman acting for the Region Director.

The Area Chairman will monitor and estimate the costs in advance in cases where airfare is a major consideration in the number of people attending from a section. If these costs exceed budgeted funds, Region 6 Director approval is required.,

All Area meeting expense forms should be submitted to the Area Chairman for approval and attendance verification. The Area Chairman will forward the expense forms to the Region 6 Treasurer to complete the reimbursement process.

3. Student Activities.

The Student Activities Chairman will be responsible for deciding the number of days authorized for each individual at each meeting up to a maximum of two days. Each person must be notified in advance if they are authorized for more than one day.

Student activities expense reimbursement claims should be mailed to the Student Activities Chairman for approval and forwarding to the Region 6 Treasurer for payment.

Travel expense is limited to car mileage, and you should have at least three students in the vehicle. Air travel for student meetings shall be authorized by the Region Student Activities Coordinator or the Region 6 Director before the expense is incurred. Hotel rooms should be occupied by two students if possible or appropriate.

4. Other Meetings.

Attendance at other meetings for Region 6 business must have the prior approval of the Region director to receive expense reimbursement.

Reimbursement Policy and Limitations

1. Airline Costs. Payment is limited to round-trip fare to the meeting location. Request Super Saver flight fares wherever they apply. The airlines will not automatically give you these fares. You must ask for them. Staying over Saturday night usually results in less expenses to IEEE and is recommended when applicable. Make airline reservations one month or at least two weeks in advance. This action enables you to get the lower-priced seats since these low-priced seats fill up early. Use low-fare airlines whenever possible.

Airline Ticket Receipt: There is only one official flight receipt - this is the red carbon copy or ARC card marked "passenger receipt" behind the actual airline ticket. Whoever holds this red carbon receipt at the end of the year is the person or company or organization that can claim the official flight expense. If you share the cost between IEEE and your company, then your company should have this red copy. If you pay for the flight yourself, then you may keep the red copy. Otherwise, it is a mandatory requirement that IEEE have this copy.

2. Hotel and Meal Expense.

Stay at the hotel that is recommended by the meeting organizer. This allows IEEE members to meet one another before the official meetings; it also allows them to dine together and share IEEE information. If you desire to stay in a more expensive hotel, it is requested that you pay the additional costs and only bill IEEE for the equivalent cost of the recommended hotel. Also, if you bring your spouse, then you should only charge IEEE for the single room rate. Make the appropriate corrections to your hotel bill prior to sending it to IEEE.

Lodging, meal, and local transportation expense will be reimbursed at actual cost. Wherever possible, receipts should be obtained and attached to expense claims when submitted for payment. It is contemplated that reasonable judgment will be exercised in making these expenditures.

3. Car Rental.

Car rental is not an allowable expense without prior approval by the Region Director. The exception to this rule is when cheaper transportation is not available or you can demonstrate cost savings to IEEE by using a rental car. Attach a statement to your expense report giving the reason for using a rental car and detailing the cost savings to IEEE.

If air transport is the normal travel mode, but you wish to drive to take your companion along, the reimbursement will be limited to the cost of one Super Saver flight fare. Only

one person in a private vehicle may make a claim for reimbursement. Further, the vehicle must be adequately insured as defined by IEEE.

Travel over 50 miles will be reimbursed at the IRS approved mileage rate for business travel up to a maximum which is the equivalent of Coach Air Fare between points, or points of equivalent distance if no air service exists.

4. One-Day Limit.

Regional Committee Meeting and Area Meeting attendees will be authorized only ONE DAY expenses per meeting, except Hawaii and Alaska, which may be authorized two days. See Airline Costs for exceptions to this policy. Members living within a 50-mile radius of a meeting location will not normally be authorized any reimbursement for meals or hotel.

General Comments

Please share expenses with your company or employer if possible. This shows your company your active involvement with IEEE and gives you additional recognition. Plan ahead. Try to combine your IEEE business with a trip you are making to save time and dollars.

Policy Exceptions and Revisions

The Regional Committee authorizes the Region Director, with the advice and consent of the Region Budget Committee, to alter this policy if, in their judgment, it is reasonable to predict the expenditures will exceed the Region budget.

In special hardship cases, or where special circumstances warrant, these general policy statements may be waived by PRIOR approval of the additional expense reimbursement from the Region Director.

IEEE THE INSTITUTE OF ELECTRICAL AND ELECTRONICS ENGINEERS, INC.

REGION 6

**SPECIFIC POLICIES FOR
STUDENT TRAVEL TO REGION 6 MEETINGS**

Student Activities

Students should take advantage of any assistance available from local Sections to help fund travel to Section and Area meetings.

1. Fall Area Training Meetings

A. Students living within a 50-mile radius of the Area meeting location do not normally receive any travel or meal reimbursements.

B. Mileage will be reimbursed for one car/van from each student branch.

C. If distance traveled is more than 200 miles, one night's lodging and one day's meals will be reimbursed if necessary. Hotel rooms should be shared by two or more students where appropriate.

D. Student branch faculty advisors should travel with the students wherever possible and appropriate. Separate travel requests must have prior approval of the Area Chairman.

E. Where travel by air is absolutely necessary, prior approval of the Area Chairman and Region 6 Director or his designate is required. Air travel, if approved, is limited to one student leader and one faculty advisor from each branch. Meals and lodging for one day will be reimbursed if required. Travel from Alaska and Hawaii must be approved by the Region 6 Director prior to the meeting.

2. Spring Area Meetings and Contests

A. Students living within a 50-mile radius of the Area meeting location do not normally receive any travel or meal reimbursements.

B. Mileage will be reimbursed for two cars/vans from each branch if there are contestants in one or more Area Contests.

C. If distance traveled is more than 200 miles, one night's lodging and one day's meals will be reimbursed if necessary. Hotel rooms should be shared by two or more students where appropriate.

D. Student branch faculty advisors should travel with the students wherever possible and appropriate. Separate travel requests must have prior approval of the Area Chairman.

E. Where travel by air is absolutely necessary, prior approval of the Area Chairman and Region Director or their designate is required. Air travel is limited to one student leader, the faculty advisor, and one contestant for each contest being held. Meals and lodging for one day will be reimbursed as necessary. Any travel from Alaska or Hawaii must be approved by the Region Director prior to the meeting.

3. Student Paper Contest

A. Contestants living within a 50-mile radius of contest do not normally receive any travel reimbursements.

B. Mileage for each of the **five** Area contest winners will be reimbursed from their residences to contest, and lodging and meals for up to two days may be claimed as necessary.

C. Requests for travel by the Advisors of the five contestants must be made to the Region 6 Student Activities Chairman prior to the meeting.

D. Where air travel is necessary, reimbursement is limited to the lowest avoidable air fares and up to two days' lodging and meals.

4. Reimbursement Claims

All claims for travel (students and faculty advisors) should be mailed to the Region 6 Student Activities Chairman for approval and forwarding to the Region 6 Treasurer for payment.

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Signed

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