

# REGION 3 TRAVEL POLICY FOR TRAVEL PLANNING AND REIMBURSEMENT

(Operations Manual -- APPENDIX B.1)

Necessary and authorized travel expenses associated with Member and Geographic Activities will be reimbursed in accordance with policy and limitations specified herein.

Necessary and authorized travel includes travel that is required in support of regional activities and objectives and that has been authorized by the Regional Director and/or the Regional Executive Committee. This travel is generally limited to travel by Regional Committee and Regional Executive Committee members in attending Regional meetings as well as travel by Area/Council Chairs and Regional Committee Chairs in carrying out their responsibilities.

Reimbursement as covered below will be made upon submission of an expense report in the IEEE Volunteer Expense Reimbursement Platform (Concur) within 30 days of the incurred expenses. The following link provides access to Concur for creating an account, training, support, and usage. There are also smartphone applications available. Expense reimbursements are made via direct deposit to the bank account associated with the user's Concur account.

<https://ieee.org/concur>

Each Concur expense report submittal requires evidence of incurred expenses such as hotel statements, travel ticket stubs, etc. on the following basis:

- a. Receipts must be submitted for any single expenditure in excess of \$25.00. Receipts are scanned and attached in Concur. Electronic receipts are acceptable and are attached in the Concur report. Explain any expenses that are being shared with others.
- b. The reimbursement for personal auto use is the smaller of the round-trip mileage multiplied by the rate authorized by the IEEE Controller or the round-trip tourist airfare. IEEE's car rental program can be found at <https://www.ieee.org/membership/services/travel/car-rental.html>.
- c. The reimbursement for lodging is no more than one night's lodging for each day of the meeting as required for attendance at the meeting, at the IEEE single

occupancy rate, and at the IEEE contracted hotel if any. Note that lodging tax must be entered separately within Concur.

- d. Individual daily meal and beverage expenses are limited to US\$100. This is not to be interpreted as a per diem amount. Expenses that exceed the US\$100 daily threshold require a written explanation and Region Director approval. Where meals are provided by IEEE or the meeting, the daily limit will be reduced by \$23 for breakfast, \$27 for lunch, and \$50 for dinner.
- e. The reimbursement for ground transportation is limited to the cost of necessary taxi service, other ground transportation, and (long-term) airport parking.
- f. The reimbursement for telephone calls and incidental tips is limited to \$15.00 per trip.

*Spouse expenses are not reimbursable. A rental car in conjunction with air transportation is reimbursable only when the cost is justifiable and with the Region 3 Delegate/Director's prior approval.*

Under extenuating circumstances, the Region 3 Delegate/Director is authorized to approve expenses which vary from the above provided a written request showing justification for such variance is submitted **in advance of incurring the expense**.

All members authorized to travel on any IEEE activity are asked to seek the support of their employer for travel expenses and to request reimbursement from IEEE only when such support cannot be obtained.

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### **Document Notes**

If driving to a meeting, a rental car should be used if the total cost is less than that incurred using your personal car and claiming the mileage rate. Midsize cars are usually available at weekend (noon Thursday thru noon Tuesday) rates of less than \$50.00 per day, all taxes and fees included, from Hertz, National, Avis, Enterprise, Budget, and others.

Example: SoutheastCon requiring arrival before 5:00 PM Friday and departure after noon Sunday might require car rental late Thursday and return early Monday, incurring less than \$200.00 for rental. Assuming about \$14 gasoline cost per 100 miles then a rental car is less expensive than your personal car for any trip that is over 227 miles each way (at \$0.58 per mile).

Volunteers who rent cars should review the following web site. <https://www.ieee.org/content/dam/ieee-org/ieee/web/org/about/ieee-business-auto-liability-and-physical-damage-insurance-coverage-highlights-2018.pdf>

Note: The current reimbursement rate for auto mileage used in Concur is set by the Internal Revenue Service and can be found at <https://www.irs.gov/Tax-Professionals/Standard-Mileage-Rates>. The same web site shows a history of reimbursement rates.

Note: The directions for completing a request for reimbursement can be found at [Region 3 Volunteer Expense Reimbursement](#)

Commented [1]: This link provides old information and the old spreadsheet, so it needs to be updated.

According to Internal Revenue Service (IRS) publication 463, expense reports must be submitted within a reasonable period of time. The IRS defines a reasonable amount of time as adequately accounting for your expenses within 60 days after they were incurred. Due to the necessary approvals through the IEEE review chain, and in order to get reimbursements back to the volunteers as quickly as possible, Region 3 requires expenses to be submitted within 30 days. For expenses that were paid in advance, such as airfare, a reasonable period of time for submission is 60 days after the date of travel or the date of the event.

Please note, failure to submit travel expenses within a reasonable amount of time as defined by the IRS may result in non-payment.

See IEEE Travel and Expense Reimbursement Guidelines at the following website for additional information including travel advance treatment.

<https://www.ieee.org/content/dam/ieee-org/ieee/web/org/travel-expense-reimbursement-guidelines.pdf>

Updated: 14 September 2020– John Balsam

# Region 3 Volunteer Expense Reimbursement

Region 3 has limited funds available to reimburse travel and other expenses to volunteers in performance of their duties. Please perform the following steps in order to request reimbursement for official travel or other expenses.

## Prior to Incurring Travel or Other Expenses

1. Read the [IEEE Region 3 Travel Policy for Travel Planning and Reimbursement](#). Reimbursement will be made according to the policy. Exceptions to the policy require advance approval by the Region Director (below).
2. Confirm that funds are budgeted and available or get prior approval from the Region 3 Director (below).

## As Soon as Travel is Completed or Other Expenses are incurred

1. Within 30 days of the completion of the travel or incurring other expenses, complete and submit an expense report using Concur including all required expense attachments. If the travel is related to PACE, send an email to the Region 3 Professional Activities Chair with the amount requested for reimbursement..
2. Upon final approval of the Concur expense report, the approved amount will be deposited in the submitter's bank account via direct deposit.
3. Travel advances can be accommodated if necessary. Send your request to the Region 3 Treasurer (below).

## Student Travel

Region 3 typically budgets some funds each year to help subsidize student branch travel to SoutheastCon, but the guidelines and requirements are completely different from those for Region 3 Volunteers. See the [Region 3 Student Travel Policy](#) for details. If you have questions or need assistance, please contact the Region Student Activities Chair (below).

John Balsam Region 3 Treasurer <a href="mailto:jebalsam@ieee.org">jebalsam@ieee.org</a>	Jill Gostin Region 3 Director <a href="mailto:jgostin@ieee.org">jgostin@ieee.org</a>	Bailey Ulferts Region 3 Student Activities Chair <a href="mailto:bailey.ulferts@gmail.com">bailey.ulferts@gmail.com</a>	Jacquelyn Cunningham Region 3 Professional Activities Chair <a href="mailto:jdnc@ieee.org">jdnc@ieee.org</a>
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*John Balsam*

Modified: 14 September 2020

# Motion to approve updated Region 3 Travel Policy and Reimbursement Documents

**Move to approve the Region 3  
Volunteer Expense Reimbursement  
Document and the Region 3 Travel  
Policy Document as presented**