



## TRAVEL REIMBURSEMENT POLICY

The Board of Directors of IREM Utah Chapter 33 encourages its officers and staff to actively participate in the annual IREM national conferences. Officers and staff who attend IREM Conferences, paid for by IREM Chapter 33, shall be called "Sponsored Attendee(s)."

The following policies are set forth to specify those expenses which are approved and reimbursable as legitimate Chapter related business travel expenses for Sponsored Attendees.

### **Eligibility: Regional Conference**

The Regional Conference is focused on Chapter Improvement and Leadership Training for the current year. The Board of Directors of IREM has approved the current President, President Elect and IAE as Sponsored Attendees of the Regional Conference. If any of the approved attendees cannot attend as Sponsored Attendees, they must decline attendance 90 days prior to the event in order to allow another member to be appointed by the Board, and to schedule the trip in a timely fashion. The appointment of a replacement Sponsored Attendee is at the discretion of the Board and not mandatory.

### **Eligibility: Global Summit**

The Global Summit is focused on strategic planning and offers topics and sessions that support the leadership efforts for the upcoming year. Therefore, it is the decision of Chapter 33 to approve the current President, President-Elect, Secretary/Treasurer, and IAE as Sponsored Attendees of the Global Summit. If any of the approved attendees cannot attend, they must decline the trip 90 days prior to the event, in order to allow another member to be appointed by the Board, and to schedule the trip in a timely fashion. The appointment of a replacement Sponsored Attendee is at the discretion of the Board and not mandatory.

### **Conference Participation**

IREM Utah Chapter 33 Sponsored Attendees act as agents of IREM Chapter 33 during travel. Sponsored Attendees are expected to attend conference sessions, returning with data and information that is primarily of value to the membership as a whole, with individual or personal preferences for attending specific sessions a secondary consideration.

The role of the current President is to shadow the President-Elect during all conference sponsored activities. The President is to ensure that the President-Elect understand the responsibilities of Governing Council, to introduce the President-Elect to key IREM National personnel, and to participate in the successful transfer of information and knowledge to the President-Elect.

To be eligible for reimbursement, Sponsored Attendees must participate in each of the following activities: OPENING SESSION, REGIONAL FORUMS, CHAPTER LEADERSHIP FORUM,

GOVERNING COUNCIL, and PROFESSIONAL DEVELOPMENT SESSIONS. Attendees should work together to assign coverage to sessions that overlap in timing.

Community Service Projects during the Conference: Sponsored attendees are permitted to attend the community service project that may be a part of the conference agenda, and the expenses related will be covered by the Chapter.

Golf Tournament: During the Fall Conference, the IREM Foundation typically hosts a golf tournament. If a sponsored attendee would like to attend the golf tournament, they must do so at their own expense. If the sponsored attendee does not wish to participate in the golf tournament, it is expected that they would be attending the concurrent sessions in its place.

IREM Chapter 33 recognizes that Officers who travel as Sponsored Attendees may, from time to time, be required to handle unexpected issues arising in their workplace. IREM Chapter 33 is tolerant of this interruption, and asks that the IAE be alerted via text or phone call, if the Officer cannot attend a required session.

#### **Pre-Paid or Chapter Paid Expenses:**

- Early conference registration, including Gala, Awards Dinner, Foundation Events, Regional Dinner, and entertainment event sponsored by IREM, may be paid by sponsored attendees and then reimbursed through the appropriate form through the Chapter. If sponsored attendee prefers to have the Chapter pay the initial expense, it must be arranged with the Association Executive.
- Flight reservations for Coach Class travel and reasonable baggage fees. Travel commitments must be made as early as possible in order to secure the best fares, ideally at least thirty (30) days in advance and may be paid by sponsored attendees and then reimbursed through the appropriate form through the Chapter. If sponsored attendee prefers to have the Chapter pay the initial expense, it must be arranged with the Association Executive.
- Lodging is approved at the conference site hotel for the single lowest conference rate offered, plus applicable taxes, for arrival the day of the conference opening session, and departing the day of the final session. Room sharing is not mandated for attendees. The member is responsible for personal and extra charges not related to the room charge and tax. Hotel room and tax is to be paid by sponsored attendee and reimbursed using the appropriate form.
  - If flight restrictions require that the attendees arrive prior to the day of the conference Opening Session, incurring an additional hotel room night for an attendee, the cost must be approved by the Board in advance.
  - Itemized hotel receipt is required to be submitted to the Chapter for automatic payment on the Chapter credit or debit card.
  - Room service for meals, beverages, and snacks should not be charged to the room, as these items have been covered in the Stipend.

## **Stipend**

Each attendee shall receive \$75 per day to be used for meals, beverages, snacks, and tips for all services, at the discretion of the attendee. The attendee will not be asked to provide receipts for the stipend amount provided. If the attendee should spend more than \$75 per day, it is the responsibility of the attendee to fund the additional meal, beverage, and snacks expense, and the amount funded by the attendee will not be considered reimbursable.

The Stipend amount shall be paid per day, from the day of the conference Opening Session through the day of the Closing session. If flights or timing require that the attendee arrive in the conference city prior to the Opening Session or after the Closing session, the additional Stipend must be approved by the Board in advance.

## **Reimbursable Expenses**

Reimbursable Expenses Reimbursable Expenses are defined as cash or credit provided by the Sponsored Attendee, which can be reimbursed to the attendee after the conference by the Chapter. The following items are approved as Reimbursable Expenses:

- Ground transportation to and from the airport.
- Ground transportation to conference events
- Ground Transportation to restaurants
- Mileage to and from airport
- Airport parking
- Internet access if directly related to Chapter, IREM or conference business

The Chapter encourages members to use the most economical method and share rides whenever possible.

**Reimbursable Expense Receipts** Itemized receipts must be provided for every claimed reimbursable expense. Non-itemized or lost receipts shall include justification and will be reimbursed at the discretion of the Treasurer, with appeal available to the Board.

## **Reimbursable Expense Procedures**

A Chapter expense report including supporting documents must be completed and submitted to the Chapter office within thirty (30) days. Reimbursement will be made within ten (10) days upon receipt of all necessary information. Questionable expenses can delay reimbursement.

## **Spouse/Partner Attendance**

All expenses related to spouse attendance are the responsibility of the Sponsored Attendee and the spouse/partner.

## **Professional Conduct**

All Sponsored Attendees are expected to maintain the highest standards of professional conduct at all times. Maintaining a high standard of professional conduct fosters a collegial, effective learning environment, develops skills that are vital to success in any field, and helps to enhance the reputation of IREM Utah Chapter 33 as well as those associated with it. Violation of the Professional Conduct portion of this policy may result in the sponsored attendee no longer being eligible for future attendance at conferences. The standards for professional conduct require that all Sponsored Attendees will:

- Be punctual, prepared, and appropriately attired for conference activities
- Treat all colleagues, whether present or not, with respect, dignity, and courtesy
- Display a positive, cooperative, and cordial attitude
- Refrain from inappropriate use of cell phones, PDAs, and other technologies during conference activities

### **Chapter Financial Status**

IREM Utah 33 believes that attendance at National Conference is a critical component influencing Chapter growth, development and operations. The goal of IREM Utah Chapter 33 is to be represented at each conference. Conference travel for Sponsored Attendees must be a part of the annual budget. All travel related to IREM Conference is subject to the financial health of the Chapter. If the Chapter Budget becomes compromised, and the Chapter must waive important and beneficial services to the membership in order to sponsor attendees, the Board may vote to reduce the number of sponsored attendees or cancel Conference travel for all Sponsored Attendees, relative to the financial position. Decisions made to reduce or cancel Conference attendees are effective only for the immediate upcoming conference, and all efforts to re-establish attendance at the following conference becomes a priority.

Approved: December 31, 2016