

# Expense Reimbursement Policy

Revised June 27, 2015

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## **ASHRAE DISTINGUISHED LECTURERS PROGRAM**

ASHRAE is indebted and deeply appreciative to those Distinguished Lecturers and employers who are able to underwrite the Distinguished Lecturer expenses. ASHRAE also appreciates the efforts of all the lecturers in keeping expenses to a minimum when making travel arrangements.

Every year each ASHRAE region may sponsor several Distinguished Lecturer visits, which are funded by the Society. The Regional Vice-Chair for Chapter Programs must approve all chapters that will host a Distinguished Lecturer at ASHRAE's expense. Chapters that arrange a lecturer visit without the required approval are responsible for all expenses associated with the visit. Lecturers are encouraged to ask the chapter if they have received prior approval to ensure there is no confusion in this area. If visits are arranged outside of the Distinguished Lecturers Program, the chapter is only responsible for paying the expenses that would normally be reimbursed by the Society and the chapters for such a visit, as outlined below.

Multi-Chapter visit requests that exceed \$2000 for U.S./Canada visits and \$3500.00 for International visits must receive prior approval from the CTTC Committee. Multi-chapter visits that do not exceed these amounts can be approved by ASHRAE staff. The complete itinerary for multi-chapter visits (including layovers and plane changes) must be approved by staff before travel is confirmed.

Visit your country's government website for more information on travel and warnings. Refer to the Society Travel Reimbursement Policy for complete details. A list of the U.S State Department's current travel alerts and warnings can be found at the link below:

[http://travel.state.gov/travel/cis\\_pa\\_tw/cis\\_pa\\_tw\\_1168.html](http://travel.state.gov/travel/cis_pa_tw/cis_pa_tw_1168.html)

### **A. TRANSPORTATION**

Approval of travel by ASHRAE headquarters is required **before** lecturer travel arrangements are confirmed.

#### Air Travel

1. ASHRAE policy on the use of air transportation is to pay for the 14-day advance purchase coach fare applicable to the destination. Lecturers who do not comply with the 14-day advance airfare purchase requirement will be reimbursed the cost of a 14-day advance purchase coach ticket. If a lecturer chooses to upgrade seating, the difference in cost is not reimbursable. If the lecturer cannot comply with this policy or has any special circumstances, a letter of explanation may be submitted with the expense reimbursement request. Upgraded reservations are the responsibility of the lecturer.
2. Lecturers choosing to use private aircraft will be reimbursed at the lowest commercial rate available within 60 days before the flight based on ASHRAE's reimbursement policy. Under no circumstances will the cost of charter aircraft be reimbursed without prior approval of ASHRAE's Executive Vice President.
3. Reimbursement will be made for one bag.

#### Auto Rental

Auto rental will be authorized only if flights are not available to maintain the lecturer's schedule or if the cost of auto rental plus fuel is less expensive than the airfare. Auto rental is not

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authorized from the lecturer's home to the airport or from the airport to the hotel or meeting place unless the cost of auto rental, mileage, tolls, and parking is less than the cost of taxi, shuttle, personal auto, or hotel/airport limousine service. When returning a rental car, it should be refueled in order to avoid incurring the rental car company's service charge. Chapter officers will often make arrangements to meet the lecturer at the airport and provide local transportation during the visit.

## Private Vehicle Transportation

1. If a lecturer chooses to drive to a meeting location where air transportation is available, ASHRAE may reimburse the 14-day advance purchase coach fare or the current U.S. Internal Revenue Service reimbursement rate, whichever is less. Expenses for mileage incurred other than on a direct route to and from the meeting will not be reimbursed.
2. Expense for use of a lecturer's personal automobile from home to the airport and return will be reimbursed at the current U.S. Internal Revenue Service reimbursement rate.

## Other Modes of Transportation (i.e., Bus, Train, Boat)

The maximum amount that the lecturer will be reimbursed will be equal to the lesser of the actual transportation cost and the 14-day advance purchase coach fare.

### **B. HOUSING**

The ASHRAE chapter(s) will reimburse the lecturer for a standard, single occupancy room for a maximum of two nights at a moderate rate hotel for each Distinguished Lecturer visit to a chapter. Consideration will be given for a third night for international travel, when necessary. If a lecturer chooses to upgrade accommodations, the difference in cost is not reimbursable. Chapters are encouraged to assist in making all local arrangements for the lecturer and are to be coordinated with the lecturer.

### **C. VISAS AND INOCULATIONS**

Necessary visas must be obtained through a service in the lecturer's country. Visas may take several months to obtain. Plan accordingly. Personal physicians should be consulted about inoculation requirements for traveling abroad.

### **D. EXPENSES NOT REIMBURSED BY ASHRAE HEADQUARTERS**

1. If a lecturer visit includes a weekend or extended break in the presentation schedule and the lecturer chooses not to stay in the city of the most recent talk or in the city of the next presentation, it is the responsibility of the lecturer to pay the additional expenses associated in any deviation from the direct route. Most "resort" locations involve more expensive hotels, food, etc., and lecturers will be responsible for the differences in expenses. Lecturer will be responsible for any increase in airfare required to travel to and from the resort.
2. Travel Insurance is optional and is not reimbursable.
3. The host ASHRAE Chapter(s) are responsible for reimbursing reasonable meal expenses incurred by only the Lecturer during the visit. Meals are not reimbursable by Society during a lecturer visit. Meals for personal or company business, spouse/friends, and/or chapter officers/members are not reimbursable in any case. The cost of liquor will not be reimbursed.
4. The host ASHRAE Chapter(s) are responsible for provision of local transportation to and from airports. Expenses for taxi, bus, shuttle, or hotel/airport limousine are not reimbursable by Society. If the host ASHRAE Chapter(s) cannot provide the local transportation, Lecturers are encouraged to use the most economical means of transportation.

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5. Telephone calls are not reimbursable.
6. Gratuities are not reimbursable.
7. Dry cleaning and laundry are not reimbursable.
8. Passports and inoculations are not reimbursable.
9. Speaker's honorariums are not reimbursable.
10. Personal expenses for extended travel beyond the scheduled visit.

## **E. EMERGENCY SITUATIONS**

If an emergency situation requiring a change in travel or hotel reservations should arise while the lecturer is in transit, ASHRAE will consider reimbursing the necessary expense in keeping with the provisions set forth in this Distinguished Lecturer Expense Reimbursement Policy.

## **F. EXPENSE STATEMENTS**

1. Lecturers must submit the attached Distinguished Lecturers Summary Report within 30 days of the completion of each lecturer visit. Reimbursement forms should be sent to [chapterprograms@ashrae.org](mailto:chapterprograms@ashrae.org).
2. Receipts and tickets must be included with any travel reimbursement claim and must clearly show the amount claimed and date of purchase. When senior citizen discounts, bulk purchase coupons, yearly flight package, or frequent flyer coupons are used, boarding passes in lieu of tickets may be included. For electronic tickets, a receipt from the airline, travel agency, or credit card statement will be acceptable.
3. All claims should be made in U.S. currency, if possible. Where receipts or tickets are in currencies other than U.S. dollars, the claim must clearly show the type of currency. ASHRAE will reimburse in U.S. dollars at the exchange rate that exists at the time the claim is processed by ASHRAE.

## **G. QUESTIONS**

Questions concerning this Expense Reimbursement Policy should be directed to [chapterprograms@ashrae.org](mailto:chapterprograms@ashrae.org).