

TRANSPORTATION REIMBURSEMENT POLICY FOR REGIONS

I. Transportation Reimbursement Policy for Chapter, Section and Student Branch Visits

- A. Transportation reimbursement is authorized for one visit per year to each Chapter by either the Director and Regional Chair (DRC) or Regional Officer once a year. The DRC will determine who shall make the official visit. The DRC must personally visit each chapter at least once during their three year term.
- B. The Director and Regional Chair (DRC) may authorize reimbursement for additional visits, maximum to equal the number of chapters and sections in the region, to use for chapter, section or student branch visits.

The DRC may assign these additional visits, as needed, to the following regional positions: Director and Regional Chair, Assistant Regional Chair, Region Members Council Representative, Regional Vice Chairs (6), Nominating Committee Member, Nominating Committee Alternate, Regional Historian, Regional Electronic Communications Chair, Regional Representatives, Regional Treasurer, Regional Secretary, Regional Refrigeration Chair, Regional Webmaster, CRC General Chair and Sub-Region Chairs for the Region-At-Large, etc.

- C. By August 31 of each year, the DRC must give Headquarters a list of chapter visits including names, regional positions, dates, chapters, sections and student branches to be visited.
- D. Transportation expense will be reimbursed by Society if requested for these visits. Transportation is the mileage, air fare, rail, or bus expense for the trip. Additional expenses (hotel, meals, etc.) may be reimbursed by the Region, depending on the Region's policies, or by the Chapter, depending upon Chapter's policies.
- E. The allotted transportation visits may be used for the transportation expense of the DRC's regional selected leader shadow (LeaDRS) to attend the Winter and Annual meetings (one trip per meeting).

II. Transportation Reimbursement Policy for Regional Planning Meetings

- A. Transportation reimbursement is approved for attendance at one annual regional planning meeting held within the region to plan their upcoming year's activities for the following individuals:
 - Director and Regional Chair (DRC)
 - Assistant Regional Chair (ARC)
 - Region Members Council Representative (RMCR)
 - Six (6) Regional Vice Chairs (RVC) of:
 - Chapter Technology Transfer
 - Membership Promotion
 - Research Promotion

- Student Activities
- Government Affairs
- Young Engineers in ASHRAE
- Region-At-Large Sub-Region Chairs
- Nominating Committee Member
- Nominating Committee Alternate
- Regional Historian
- CRC General Chair
- Regional Treasurer
- Additional person at the discretion of DRC
- The incoming and outgoing DRCs and RVCs are to attend both their spring CRC and regional planning meeting. The newly elected incoming Nominating Committee Member and Nominating Committee Alternate may attend both their CRC and regional planning meeting if deemed necessary.

- B. Chapter officers and other Regional Positions, as specified under Section I, Paragraph B, may be reimbursed to attend the regional planning meeting, at the discretion of the DRC, if the visits are allocated under Section I, Paragraph B and the total number of discretionary visits do not exceed the number of chapters and sections in the region.
- C. The DRC has the option to expand the committee over the allowed maximum of thirteen members; however, transportation costs will not be reimbursed for these optional members except as defined in Section I, Paragraph B.
- D. The DRC has the option to invite the region's presidents elect for President Elect Training to the Regional Planning Meeting however, transportation costs will not be reimbursed for these optional members except as defined in Section I, Paragraph B.

The chapter visits will be used as a way of transportation reimbursement only if authorized by the DRC to attend.

III. Transportation Reimbursement Policy for CRCs

- A. Transportation reimbursement is approved for attendance at the Chapter's Regional Conference for the following:
- Director and Regional Chair (DRC)
 - Assistant Regional Chair (ARC)
 - Region Members Council Representative (RMCR)
 - CRC General Chair
 - Chapter Delegate
 - Chapter Alternate
 - Nominating Committee Member
 - Nominating Committee Alternate
 - Six (6) Regional Vice Chairs (RVC) for:
Chapter Technology Transfer
Membership Promotion

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Research Promotion
Student Activities
Government Affairs
Young Engineers in ASHRAE

- Region-At-Large Sub-Region Chairs
- Regional Historian
- Regional Treasurer
- Chapter Technology Transfer Chair (no substitutes)
- Chapter Government Affairs Chair (no substitutes)
- Young Engineers in ASHRAE Chair (no substitutes)

NOTE THE FOLLOWING FOR CENTRALIZED TRAINING:

- Chapter Membership Promotion Chairs and Co-Chairs are reimbursed for Membership Promotion Centralized Training (no substitutes)
 - Chapter Research Promotion Chairs are reimbursed for Research Promotion Centralized Training (no substitutes)
 - Chapter Student Activities Chairs are reimbursed for Student Activities Centralized Training **or** CRC Workshop but **not** both (no substitutes)

 - A Director and Regional Chair nominee may attend one CRC in another Region prior to beginning their three year term. Each Director and Regional Chair is authorized to attend a maximum of two Regional Conferences in another Region during the first two years of their three year term. The Members Council Chair shall approve in advance visits by a DRC to another's Region's Chapter Regional Conference and decide on the level of contribution to the transportation costs.

 - The CRC General Chair Designate from the Host Chapter may attend a CRC meeting in the same or another region if the Director and Regional Chair deems it beneficial.

 - The incoming and outgoing DRCs, ARCs, RVCs, RMCRs and SRCs may attend both their CRC and regional planning meeting if deemed necessary by the DRC.
- B. Transportation reimbursement is approved only for those members who complete their respective duties at the CRC. The DRC should issue signed ASHRAE Transportation Vouchers only to those regional officials, Chapter Delegates and Chapter Alternates who have attended all required workshops, meetings, caucuses and sessions at the CRC.
- C. The DRC may attend a maximum of two (2) pre-planning meetings with the CRC host chapter.
- D. For positions not listed as authorized approval to attend the CRC, the DRC may invite other region or chapter positions to the CRC, however, transportation costs will not be reimbursed for these optional members except as defined in Section I, Paragraph B.

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The chapter visits will be used as a way of transportation reimbursement only if authorized by the DRC to attend.

IV. Transportation Reimbursement policy for Regions having a joint CRC

A. Transportation reimbursement is approved for members of the CRC Planning Committee in charge of preparing a joint CRC between 2 or more regions with respect to the following situations:

a. Joint CRC between 2 Regions:

i. The CRC is located in one of the 2 regions: the following members are to be reimbursed for transportation as per the below table.

Position	Responsibility	Travel Visits to Venue Prior to CRC
DRC Region 1	CRC Director	2
DRC Region 2	CRC Co-Director	2
RMCR Region 1	Coordinate/Collect Chapter Information, assist DRC 1	1
RMCR Region 2	Coordinate/Collect Chapter Information, assist DRC 2	1
Host Chapter CRC Co-Chair Region 1	Schedule Venue/Chair of CRC Planning Committees	NA
CRC Co-Chair Region 2	CRC Planning Committees Co-Chair	2
Host Chapter Meetings Chair Region 1	Schedule Workshops/Meetings Region 1	NA
Chapter Meetings Co-Chair Region 2	Schedule Workshops/Meetings Region 2	1

ii. The CRC is located in a neutral place or outside the geographical territory of both regions: the following members are to be reimbursed for transportation as per the below table:

Position	Responsibility	Travel Visits to Venue Prior to CRC
DRC Region 1	CRC Director	2
DRC Region 2	CRC Co-Director	2
RMCR Region 1	Coordinate/Collect Chapter Information, assist DRC 1	1
RMCR Region 2	Coordinate/Collect Chapter Information, assist DRC 2	1
Host Chapter CRC Co-Chair Region 1	Schedule Venue/Chair of CRC Planning Committees	1
CRC Co-Chair Region 2	CRC Planning Committees Co-Chair	2
Host Chapter Meetings Chair Region 1	Schedule Workshops/Meetings Region 1	1
Chapter Meetings Co-Chair Region 2	Schedule Workshops/Meetings Region 2	1

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Region 1: Host CRC

Region 2: Visiting CRC

b. Mega CRC between 3 or more Regions:

i. The CRC is located in one of the regions: the following members are to be reimbursed for transportation as per the below table

Position	Responsibility	Travel Visits to Venue Prior to CRC
DRC Host Region	CRC Director	2
DRC Visiting Region	CRC Co-Director	2 / DRC
RMCR Host Region	Coordinate/Collect Chapter Information, assist DRC	1
RMCR Visiting Region	Coordinate/Collect Chapter Information, assist DRC	1 / RMCR
Host Chapter CRC Co-Chair Host Region	Schedule Venue/Chair of CRC Planning Committees	NA
CRC Co-Chair Host Region	CRC Planning Committees Co-Chair	2 / CRC Co-Chair
Host Chapter Meetings Chair Host Region	Schedule Workshops/Meetings Host Region	NA
Chapter Meetings Co-Chair Visiting Region	Schedule Workshops/Meetings Host Region	1 / Chapter Meetings Co-Chair

ii. The CRC is located in in a neutral place or outside the geographical territory of participating regions: the following members are to be reimbursed for transportation as per the below table

Position	Responsibility	Travel Visits to Venue Prior to CRC
DRC	CRC Director	2 / DRC
RMCR	Coordinate/Collect Chapter Information, assist DRC 1	1 / RMCR
Host Chapter CRC Co-Chair	Schedule Venue/Chair of CRC Planning Committees	1 / Host Chapter CRC Co-Chair
Host Chapter Meetings Chair	Schedule Workshops/Meetings Region 1	1/ Host Chapter Meetings Chair

V. OTHER

A. The cost to purchase a VISA (fee only), when required, will be reimbursed as part of the normal transportation reimbursement for all Members Council transportation. Additional expenses that occur in association with the purchase of a VISA will not be reimbursed by Society. However, reimbursement of additional expenses may be paid from the chapter and/or region's physical budget upon prior approval of the DRC to do so.

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Visas are very important for those travelling to international countries that require them. The process to obtain a Visa can take up to 2-5 months to process depending upon the circumstances. Visas should be obtained before purchasing transportation. If for any reason the member cannot attend the regional event, reimbursement for and/or cancellation fees or any other expenses incurred will not be covered by Society. If Visas are not purchased in a timely manner or if the Visa cannot be obtained because of government restrictions, the member will incur the expense.

- B. The transportation budget will be set by the Society (Mileage & Airfare). The DRC may establish caps based on regional conditions and shall manage their transportation expense budget.
- C. The DRC may authorize additional transportation reimbursement to use for chapter or regional activities as long as the total number of approved reimbursements does not exceed the maximum number allocated by the combined totals as outlined in Sections I, II and III above.
- D. According to Society policy, the following statement is strongly enforced: All claims should be submitted to ASHRAE's comptroller within 30 days of the travel date. Claims submitted after 90 days will not be reimbursed (see Society Transportation Reimbursement Voucher, page 2, Documentation).
- E. Regions may cover additional travel expenses not covered by Society from their regional funds for regional officers. These reimbursements should be based on policies established by the region with all expenses approved by the DRC prior to payment.
- F. Society will reimburse the mileage, air fare, rail, bus and one checked bag. Additional expenses such as hotel, meals, transportation to and from the airport and meeting location, tolls and parking are not reimbursed by Society.