

## **Travel Reimbursement Policy (Excerpt from Rules of the Board)**

1.201.027.1 The Board of Directors recognizes that officer, Board, council and committee activities are essential to maintaining volunteer involvement in ASHRAE. These activities provide real and tangible benefits to the public, the profession and industry and are worthy of financial support. Many members use personal or company resources to defray their travel expenses, which is greatly appreciated by ASHRAE. However, there are situations where members do not have the necessary resources to defray these costs, and ASHRAE will assist the member with these costs within the limits of this policy. The member traveling on behalf of ASHRAE shall always seek to minimize the cost to ASHRAE.

### **DEFINITIONS**

1. Transportation Expense: By public transportation, the cost of round-trip fare from terminal to terminal. By automobile, mileage from home or office to destination and return.
2. Advance Purchase Coach Fare: Fourteen (14) day advance purchase (non-refundable) coach fare applicable to your destination.
3. Transportation Expense Cap: A maximum reimbursement amount per trip established by an ASHRAE Council, Board of Directors, or Director and Regional Chair.

### **AIRPLANE TRANSPORTATION**

1. ASHRAE policy on use of transportation is to reimburse the member when requested, an amount which does not exceed either the fourteen (14) day advance purchase (non-refundable) coach fare between the destination points or any transportation expense cap that applies. Exceptions must be approved in advance by the ASHRAE treasurer.
2. The basic reimbursable expense limit is for the lesser of (a) the fourteen (14) day advance (no later than) purchase (non-refundable) coach fare between the destination points and one checked bag only, or, (b) if an automobile is used for travel, the United States of America Internal Revenue Service reimbursement rate for total round trip direct miles driven. Cost of travel insurance, ground transportation (rental car, taxi, etc.), gratuities and other similar out-of-pocket expenses are not included (and therefore not reimbursable) in the basic reimbursable expense limit.
3. As most ASHRAE transportation is to attend meetings, which time and place are usually known well in advance, the member must make reservations early to take advantage of special fares.
4. In most cases airfares can be substantially reduced if the traveler stays over at the destination point. When the member stays over solely to use the reduced fare, ASHRAE will reimburse the member, when requested, for the airfare paid, plus the amount paid for one night's lodging and food to enable use of the lower fare, providing the total cost does not exceed the fourteen (14) day advance purchase (non-refundable) coach fare between the destination points. In those cases where more than one night's stay over would give a reduced airfare, approval may be authorized by the Coordinating Officer.
5. A traveler who can reduce the transportation expense by taking an alternate airport or other means of transportation (25 miles further away than the nearest airport to the traveler's office, home or destination) may request ground transportation reimbursement. The total costs (airfare, train, etc. and ground transportation) shall not exceed the cost of transportation from/to the nearest airport.
6. If the most economical fare is of the type where a cost is involved for changes in flight plans, ASHRAE will reimburse the member for such costs where the change in flight plans results from unforeseen changes in the scheduled meeting or event.
7. Reimbursement related to travel during a World Health Organization defined emergency (such as but not limited to, global pandemic)
  - a) Approved travelers must comply with Public Health Guidance, follow all local regulatory and statutory requirements and recommendations for social distancing, wearing of masks and other personal protection equipment (PPE), administrative measures, circulation of occupants, reduced occupancy, hygiene, and sanitation.
  - b) If a medical test is required by a government or other official entity in order for an approved individual to travel for ASHRAE, Society will cover the cost of that test.
  - c) Applicable Society travel insurance coverage will be enforced. For example, ASHRAE's current travel insurance typically covers hospitalization costs, but will not cover any cost related to extended stays for medical reasons (cost of room and board, flight cancellation fees, loss of revenues, etc.).
  - d) If an approved traveler needs to cancel travel arrangements, Society will not reimburse the associated costs. If airfare is purchased through ASHRAE's travel agency, then a cancelled flight may be credited to the individual for future travel. If an approved traveler makes travel arrangements outside of ASHRAE's travel agency, any cancellation fees will be the responsibility of the individual. Using Society's travel agency is voluntary, but strongly encouraged.
  - e) Approved travelers who incur additional expenses assume responsibility for those costs.

## **DOCUMENTATION**

- Travel expense reimbursement claims must be made on the approved ASHRAE form.
- 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.
- Original receipts, or electronic copies of original receipts, or tickets, must be included with any travel reimbursement claim and must clearly show the amount claimed. With the advent of ticketless travel, a receipt from the travel agency or airline or a credit card statement will be acceptable.
- Reimbursement will be provided for only the amount shown on an original transportation ticket or as indicated in IV.A.4. Reimbursement will not be made when a member chooses to use personal Frequent Flyer Miles for transportation.
- All claims shall be paid in USA or Canadian currency. The exchange rate will be determined at the time the claim is processed by ASHRAE.

## **ENFORCEMENT**

Members who do not comply with the fourteen (14) day advance airfare purchase as stated in section IV, paragraph A1, will only be reimbursed either the cost of a fourteen (14) day advance purchase coach fare ticket as defined in Section II, Paragraph C, or the maximum cost as defined in any applicable Transportation Expense Cap (Section II, paragraph E) and as confirmed by the ASHRAE Comptroller. If the member cannot comply with this policy or has any special circumstances, a letter of explanation may be submitted with the travel verification requirements as defined in Section IV, paragraph E3.

## **MEMBER RESPONSIBILITY**

Prior to making arrangements to travel on behalf of ASHRAE, it is the member's responsibility to identify what expenses are reimbursable.

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Please email voucher and all supporting documentation to your respective Council/Committee ASHRAE Staff Liaison. If mailing, please send to: ASHRAE, Attn: Accounting, 180 Technology Pkwy, Peachtree Corners, GA 30092. Alternatively, go to [http:// transportationvoucher.ashrae.org](http://transportationvoucher.ashrae.org) to submit documents electronically. Expect payment in approximately 30 days.