



## Colorado/Wyoming CCIM Chapter

### TRAVEL POLICY

The Board of CO/WY CCIM Chapter encourages its officers and other members identified below to actively participate in the annual CCIM national conferences and leadership training. Officers, Members, and/or staff who attend CCIM Conferences, paid for by CO/WY CCIM Chapter, shall be called "Sponsored Attendee(s)." Sponsored Attendees must be members of the CO/WY Chapter in good standing, with dues paid in full, throughout the time of the travel assignment, travel, and reimbursement.

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: Mid Year Conference – April (aka Spring Meeting)**

The Executive Board of CCIM has approved the current President, President Elect, Executive Director, and RVP or 1<sup>st</sup> RVP at the time of the meeting that is a member of the CO/WY Chapter, as Sponsored Attendees of the Mid-Year Conference, beginning with day one of the business meetings open for attendance and ending on the final day of the meetings. 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: Fall Conference**

The Executive Board of CCIM has approved the President-Elect and Treasurer as Sponsored Attendees of the Fall Conference, beginning with day one of the business meetings with open attendance, and ending on the final day of the member conference. If any of the Sponsored 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.

Additionally, the Executive Board of CCIM has approved the Executive Director, and RVP or 1<sup>st</sup> RVP at the time of the meeting that is a member of the CO/WY Chapter, as Sponsored Attendees of the Fall Conference, beginning with day one of the business meetings with open attendance, and ending on the final day of the Business meetings. 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. If the Executive Director or the RVP or 1<sup>st</sup> RVP that is a member of the CO/WY Chapter would like to attend the conference, the expenses related to conference attendance are their personal expense.

#### **Eligibility: Legislative Summit**

The Executive Board of CCIM has approved two (2) Sponsored Attendees for the Legislative Summit, the day of the Legislative Preparation Meeting and ending the day of the planned visit to Capitol Hill. The preference is that the attendees include one Board Member and the Legislative Representative operating under the Designation Promotion Committee. If there is no legislative representative, or the legislative representative cannot attend, the position can be taken by another Board member or another committee member interested in legislative affairs. 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.

#### **Eligibility: Leadership Training**

The Executive Board of CCIM has approved the President-Elect, Treasurer, Executive Director, and 1<sup>st</sup> RVP or 1<sup>st</sup> RVP Elect at the time of the meeting from the CO/WY Chapter, as Sponsored Attendees of the CCIM Annual Leadership Training, arriving the night before the appropriate training begins and ending the day the training ends. 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.

### **National Conference or Meeting Participation**

CO/WY CCIM Chapter Sponsored Attendees act as agents of CO/WY CCIM Chapter 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. (e.g. Instructor meetings or committee obligations).

RVP and/or 1<sup>st</sup> RVP is required to include the Chapters in discussions relative to National issues, and represent the consensus of the chapter leadership at the national events. Furthermore, it is required that the RVP and 1<sup>st</sup> RVP report bi-annually to the Chapters as to the progress and results at the National level.

CO/WY CCIM Chapter recognizes that Officers who travel as Sponsored Attendees may, from time to time, be required to handle unexpected issues arising in their workplace. CO/WY CCIM Chapter is tolerant of this interruption, and asks that the Executive Director 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 additional events sponsored by CCIM, paid for with the Chapter credit card.
- 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 paid for with the Chapter credit or debit card.
- Lodging is approved at the conference site hotel for the single lowest conference rate offered, plus applicable taxes, for dates identified in this policy. 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 may be paid for with the Chapter credit or debit card.
  - 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, based on the days permitted in the Eligibility portion of this policy. 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 are defined as payments made 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:

- New Designee Dinner
- Ground Transportation to and from the airport
- Ground Transportation to conference events
- Ground Transportation to restaurants
- Mileage to and from airport
- Airport Parking
- Faxes, photocopies and conference materials if directly related to Chapter, CCIM or conference business
- Internet Access if directly related to Chapter, CCIM 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 processed 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 CO/WY CCIM Chapter 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, and/or the requirement to reimburse any costs associated with travel and waive the reimbursement of any additional expenses related to such travel. 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 and other technologies during conference activities
- Communicate in an articulate, educated, professional manner, both orally and in writing
- Avoid any other activities which may discredit to oneself and/or CO/WY CCIM Chapter

### **Cancellation Policy**

Any member who has previously committed to travel on behalf of the Chapter, but cannot honor travel that has been pre-arranged by the Chapter, is responsible to reimburse the Chapter for any costs related to unused airline tickets or hotel cancellation penalties.

### **Chapter Financial Status**

CO/WY CCIM Chapter believes that attendance at National Conference is a critical component influencing Chapter growth, development and operations. The goal of CO/WY CCIM Chapter is to be represented at National Business meetings, leadership meetings and conferences.

Travel for Sponsored Attendees must be a part of the annual budget. All travel related to CCIM 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 travel, 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.

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