

Purpose: To address conformance of all Chapter representatives at conferences as to the guidelines around travel arrangements and responsibility to the Chapter.

Conference Attendance Policy

The VP of Operations/President-Elect will send out the Conference information as soon as it is received from PMI. There will be clear guidelines on the registration amount (to get the early bird discount), travel information (maximum the Chapter will pay for air fares – usually cheaper if booked earlier), preferred hotel, transfers (shared shuttle buses, Uber/Lyft) and parking. If an attendee exceeds the amount stated by the Chapter (maybe because they cannot book until later due to work or personal commitments), they will have to pay the difference. Exceptions will be addressed by the Board on a case-by-case basis.

This information will include clear guidelines on:

- Conference Registration amounts and deadlines for early bird
- Travel information:
 - Airfare maximum from local airports traveling economy
 - Airport transportation – Ride share when possible. Try to use least cost alternative. Use one of following options:
 - Uber/Lyft/Taxi or shared shuttle to/from airports
 - parking at airport
 - Round trip personal mileage, if “dropped off/picked up” at airport
- Hotel Information: Recommended hotel & dates the chapter is funding. Unless there is a significant advantage to staying at an alternative location, PMI recommendations are strongly encouraged.
 - If an attendee wishes to stay longer than the covered dates, have extra fees for guests travelling with the attendee, request an upgraded room, they will pay the difference.
 - If an attendee exceeds the amount stated by the Chapter (maybe because they cannot book until later due to work or personal commitments), they will have to pay the difference.
- Meals: Conference Registration covers most meals. Any meals during the conference that are not taken that should be covered are at the expense of the attendee (ex. Room service breakfast). The Chapter will cover meals that are planned “team building meals”. Should an attendee opt to “not attend” then this meal is not reimbursable and is counted as a conference meal.
 - 15% 20% gratuity
 - 1 reasonable (less than \$15) optional travel meal or snacks each direction of travel.

All expense reports must include conference notes and be submitted within 1 month of the end of the conference to be eligible for reimbursement.

PMI North America Regional Leadership Institute Meeting

The Chapter's standing practice is to invite four to six Chapter leaders for LIM in the fall based on the following expanding levels until the budgeted amount has been reached:

1. President-Elect
2. President
3. All current BoD members that are running for next year's BoD who have not yet attended LIM
4. All potential incoming new BoD members (those running unopposed as of selection time)
5. All current BoD members that are running unopposed for next year's BoD who have already attended LIM
6. Any current LIMC program participants (just travel/hotel)
7. Trustees and past-Presidents still engaged; Especially if they are PRESENTING at LIM.
8. All potential incoming new BoD members (even those running opposed)

Note: Attendees must submit an application for next year's BoD to the Nominations Committee prior to the LIM Conference.

The approved chapter budget determines the number of delegates that may be sent. The locations for each meeting are known during the budget planning cycle and must be taken into account by the Board of Directors (especially regarding the costs of airfare and hotel). The budget may allow for more or less than six people to be sent; the Board may vote to amend the budget if necessary and appropriate.

If the budget is fully allocated before everyone in an eligibility level is invited, then those at that level will be given the chance to decide among themselves. If they cannot decide among themselves, then invitations will be issued based on 1) size of commitment in the new year, 2) length of time as a PMI-LA volunteer.

In the event that the chapter is offered additional funding by PMI (speakers registration fees, award recipients) these amounts will be taken into account, increasing the total budget amount, which may allow for additional attendance above the budgeted 6 attendees.

Should ANY past, present, or future board member wish to attend the North America LIM as part of the PMI-LA Delegation, with no additional costs to the chapter, permission is granted. However, they must inform their Organizational VP so that the Board is aware of additional delegates and session coverage. PMI-LA Board may not dictate which sessions they attend, but a report on sessions is highly appreciated to bring back knowledge to the chapter.

PMI EMEA, ASPAC, LATAM LIM Meetings

PMI provides one (1) complimentary promo code for a single free registration for the chapter at each LIM that is offered. This code is sent to the President.

The chapter does not fund travel, hotel, or meals expenses for any LIM outside of North America.

Upon receipt of the code, the offer shall be made to the Governance Team (Board and Trustees) first. Should no one wish to use it, the registration code will be offered to all Key volunteers, then all volunteers. It is assigned on a first come, first serve basis.

A Report on the conference is due one (1) month following the event from the attendee explaining what you are bringing back to the chapter in exchange for free registration.

Should ANY key volunteer wish to attend the global LIMs, with no additional costs to the chapter, permission is granted. However, they must inform their Organizational VP so that the Board is aware of attending delegates and session coverage. PMI-LA Board may not dictate which sessions they attend, but a report on sessions is highly appreciated to bring back knowledge to the chapter.

PMI North America Regional Meeting in Spring

The Chapter usually has budgeted to send 10 people from the Chapter, depending on location.

The chapter's standing practice is to invite up to ten Chapter leaders for R7 Summit based on the following expanding levels until the budgeted amount has been reached:

1. BoD members
2. Potential future BoD members
3. Key volunteers (e.g., AVPs)
4. Trustees

If any of the above is presenting at the Summit, then they get priority above Key Volunteers & Trustees. Any discounts on registration will be taken into account against the budgeted amounts, allowing the Chapter to send more delegates.

Should any key volunteer wish to attend the Regional conference as part of the PMI-LA delegation, with no additional costs to the chapter, permission is granted. However, they must inform their Organizational VP so that the Board is aware of additional delegates and session coverage. PMI-LA Board may not dictate which sessions they attend, but a report on sessions is highly appreciated to bring back knowledge to the chapter.

For both conferences, the policy is that:

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- attendees pay up front for registration, hotel, travel, parking etc.*
(if they want to bring a spouse or family member, they will pay separately or deduct these amounts from their Chapter expenses)
- they attend all sessions and events, as required
(if they want to stay extra nights before or after, they will cover the expense, not the Chapter)
- after the event, each attendee will complete a short report on their learnings from all the sessions they attended
- conference report and expense form will be submitted electronically to the President or President-elect who will forward to the VP of Finance for processing of reimbursement.

**If someone cannot attend the conference ahead of time, it may be possible to transfer their registration to the next person on a 'wait list'.*

***There may be an exception when someone cannot attend the conference at short notice due to unexpected circumstances, such as a medical or family emergency, urgent work commitment etc. These should be reviewed by the BoD on a case-by-case basis, to see if the person should receive a refund from the Chapter (using member funds).*