

Finance Policy

2025

Change Control Record

| Date: | File Name: | Comments: |
|---------|----------------------------|--|
| 2015 | | Original approved by Board. |
| 11/2017 | | Updated by Financial Policy Committee |
| 11/2017 | | Approved by BoD pending VP Finance Review – MM could not find evidence of this approval in meeting minutes |
| 10/2019 | | Updated to clarify travel expenses |
| 1/2020 | PMI-LA Finance Policy 2020 | Updated to clarify policies, best practices/future state, and procedures and reduce redundancies |
| 1/2021 | PMI-LA Finance Policy 2021 | Updated to clarify policies, tighten financial controls, correct table of contents, and include Zelle as acceptable method of payment. |
| 1/2022 | PMI-LA Finance Policy 2022 | No changes |
| 12/2023 | PMI-LA Finance Policy 2023 | <ul style="list-style-type: none"> • Corporate officer titles corrected. • Updated to clarify payment collection methods. • Revised Appendix A for Credit Cards – VP of Finance holds the Credit Card and should not approve same transactions. • Removed section 2.3.5.5 (exclusions for expense reports), updated Appendix B for comprehensive list of exclusions. • Removed required for VP of department to submit a rebalanced budget in lieu of board vote for expenses over approved budget. |

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| 12/2024 | PMI-LA Finance Policy 2024 | <ul style="list-style-type: none">• Addition of vendor management requirements• Updates to credit card policy, expense report policy,• Financial Statements and Review timeline updates |
| 1/2025 | PMI-LA Finance Policy 2025 | <ul style="list-style-type: none">• Removal of companion travel from authorized reimbursement expense.• Updates to treasure process and controls |

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1. INTRODUCTION

It is PMI-LA's policy to conduct its business with honesty and integrity and in accordance with the highest ethical standards. Financial policies provide guidelines for how PMI-LA ensures financial decisions and actions are made to support the Chapter's service to its members.

It is PMI-LA's policy to maintain good fiscal controls to ensure appropriate fiduciary oversight of funds on behalf of members.

It is PMI-LA's policy to maintain good accounting records based on Generally Accepted Accounting Principles (GAAP) for non-profit organizations. Accurate accounting and financial reporting are integral to providing the necessary information for budgeting, planning and management responsibilities.

The fiscal year of the Chapter is the calendar year.

The corporate officers are the President, Vice President of Operations/President-Elect and Vice President of Finance.

1.1. SCOPE OF DOCUMENT

The scope of this document includes but is not limited to policies and best practices recording revenue and expense transactions, creating a budget, record keeping, investing the chapter's assets, and vendor management. It is used for running the financial operations of the chapter.

1.2. TARGET AUDIENCE

The primary target audience for this document is the PMI-LA Board of Directors (BOD). All members of the BOD have a duty to reasonably monitor and enforce these financial policies and procedures for the benefit of PMI-LA members. In addition, there are other PMI-LA volunteers who may use these policies and best practices under the direction of the BOD.

2. FINANCIAL OPERATIONS

The VP of Finance shall be responsible for creating, managing, and monitoring accounting processes and systems to enable the Chapter to achieve the goal of compliance with Generally Accepted Accounting Principles (GAAP) and ASC 958.

The VP of Finance shall retain qualified accounting and auditing counsel to present annually to the Board on regulatory changes that will impact PMI-LA chapter accounting and financial reporting policies and procedures.

Regarding significant issues – please refer to annual audit below.

2.1. CHAPTER ACCOUNTING SYSTEMS

PMI-LA uses QuickBooks Online Plus as its accounting system. Alternate software may be used to maintain the PMI-LA Chapter's accounting system as approved by the Board of Directors.

2.1.1. UNIFIED CHART OF ACCOUNTS

A Chart of Accounts shall be maintained as the basis for tracking Chapter revenue and expense transactions.

2.2. REVENUE

2.2.1. ACCEPTABLE PAYMENTS

No cash is accepted at any Chapter event. Any and all payments received by the chapter for event registration, participation, training, merchandise, or any other item or service (except chapter membership) must be made to PMI-LA electronically on the website, through electronic funds transfer, or via electronic payment of PayPal invoice issued by PMI-LA.

2.2.2. COLLECTION OF EVENT FEES

The PMI-LA Chapter conducts various activities (such as chapter meetings, membership events, workshops, boot camps, seminars and exam prep courses through PMI ATPs) for its members on a periodic basis.

2.2.2.1. EVENTS WHERE THE CHAPTER COLLECTS THE PAYMENT

Any event managed by the chapter must allow for online registration and payment via the chapter website.

2.2.2.2. EVENTS WHERE A THIRD-PARTY PARTNER COLLECTS THE PAYMENT

Any event managed by a third-party is not restricted to the payment guidelines of the chapter. The chapter may invoice third-party partners to collect revenue shares.

2.2.3. FUNDRAISING

The PMI-LA Chapter does not conduct fundraising activity.

2.2.4. REVENUES FROM SALES OF SPONSORSHIP, ADVERTISING, AND OTHER MARKETING ACTIVITIES

Sales agreements and ads between PMI-LA and Sponsors must be submitted to the VP of Finance. Refer to the Vendor Management section on establishing new sponsors.

2.3. DISBURSEMENTS

2.3.1. OVERVIEW

PMI-LA disburses funds for the payment of goods and services provided by vendors for the PMI-LA Chapter's benefit as well as volunteer expense reimbursements. The chapter does not provide any cash advances.

Purchases must be pre-approved in the PMI-LA Chapter's annual budget by the Board of Directors or by special vote by the majority of the Board of Directors.

All vendors must have a current W-9 on file with the VP of Finance. Refer to the Vendor Management section on requirements for initiating vendor relationships and ongoing requirements.

Any and all partnerships and ventures PMI-LA enters require a contract or memorandum of understanding. (including third-party partnerships, speaker engagement & sponsorship agreements)

All disbursements are made from PMI-LA's primary checking account, or a chapter credit card maintained at the PMI-LA Chapter's designated financial institution.

2.3.2. INITIATION OF CASH OBLIGATION

All written contracts between PMI-LA and any vendor or other provider of goods or services to PMI-LA or its membership shall be reviewed and approved by the Chapter's President, VP of Finance, and VP of the department.

See Authorization Matrix in Appendix A.

2.3.3. REFUNDS

Refund requests for event registrations may be reviewed on a case-by-case basis and must be approved by the VP of the department and submitted to the VP of Finance with an explanation for refund. The chapter absorbs any transactions fees associated with the original payment received from the participant.

2.3.4. DISBURSEMENT AUTHORIZATION LIMITS

See Appendix A – Authorization Matrix.

2.3.5. EXPENSE REIMBURSEMENTS TO VOLUNTEERS

All expense reimbursement requests will be for legitimate and budgeted Chapter business purpose, be filed timely (generally, within 30 days of purchase or event), have proper supporting documentation, and be submitted through the Chapter-approved expense reimbursement system.

The VP of Finance must approve all expense reports with the exception of their own expenses. Expense reports submitted by the VP of Finance must be approved by a different corporate officer, typically the President.

Expense reimbursements will generally be made within one calendar month of final approval of a compliant expense report and accompanying support.

Expenses must meet the following requirements for approval:

- a. Authorized: All expenses must be authorized. Authorized expenses are included in the approved Chapter budget or are presented to the Board to vote on and approve the expense separately.
- b. Accurate: Transaction amount, receipts or proof of payment, and other expense details must be correct. Business purposes must be completed.
- c. Timely: All expenses must be submitted with complete supporting documentation, generally within 30 days of purchase or event, to be considered for reimbursement.
- d. Supported: All expenses require appropriate support:
 - a. Receipt(s)
 - i. Date and location
 - ii. Amount of expenditure
 - iii. Itemized
 - iv. Readable
 - b. Attendee lists – required for event, food, travel, and/or entertainment-related expenses.
 - i. Person(s) entertained, company and title.
 - ii. Amount paid/due per attendee (for events)

2.3.5.1. EXPENSE REPORTS

The chapter uses Zoho Expense to track and approve expenses. All Board members will have an account to submit expenses. Expenses incurred by the team volunteers must be submitted by the VP of that department with instructions on the expense report to remit reimbursement directly to the volunteer. Reimbursement is made using Zelle from the chapter's primary checking account for secure and immediate transfers. Exceptions for check payments may be approved by the VP of Finance. Check reimbursements are completed through Bill Pay and may take 7-10 business days for processing and mailing once payment is remitted.

Expense reports are required for all expenses incurred directly by volunteers.

Expense reports must also be submitted for all payments completed via ACH, PayPal or corporate credit cards for one-time payments. These reports do not require reimbursement but are processed for approval and documentation.

Budgeted and recurring monthly payments that are for the same amount by the same vendor and paid by ACH or PayPal from corporate accounts do not require an expense report. Vendors must be approved and have an established agreement/contract on file (see Vendor Management section). Invoices for monthly payment should be forwarded to the VP of Finance for documentation and reconciliation. Failure to provide documentation will result in payments being ceased until documentation is provided.

2.3.5.2. ENTERTAINMENT AND BUSINESS MEALS

Volunteers will be reimbursed for all entertainment and business meals that are incurred while conducting PMI-LA Chapter business. The expense must be reasonable as determined by the VP of Finance and within the allocated budget for the event.

2.3.5.3. TRAVEL EXPENSES (FLIGHTS, HOTELS, AUTOMOBILES)

Airfare: Travelers are expected to travel Economy Class on all flights taking advantage of discounted or super saver fares whenever possible.

Vehicles: Unless specifically approved in advance, all travelers renting cars should rent compact-size autos. The traveler will be reimbursed for the cost of taxis, shuttles, or public transportation.

Chapter volunteers choosing to use their personal vehicle will be reimbursed at the federal standard mileage rate plus parking and tolls only for activity outside of or that exceeds the regular, expected execution of their volunteer commitments. Travelers will be reimbursed the least expensive of the following: a) transport via air, taxi, shuttle, and/or public transportation or b) mileage to and from the venue.

Volunteers will only be reimbursed for the cost of their own travel. Expenses incurred for companion travel will not be reimbursed. Reimbursements will not be approved for cancelations or not choosing to attend the event after making arrangements, unless approved by Board vote. Mileage, etc. will not be reimbursed for travel that is part of a volunteer's regular activities or chapter participation. The program and event related to the mileage charge must be documented in the expense report.

2.3.5.4. TRAINING AND CONTINUING EDUCATION

PMI-LA is vitally interested in the development of its volunteer staff and encourages them to attend training courses, conferences and seminars. When authorized by the Board of Directors, volunteers may attend courses, conferences, or seminars related to his/her volunteer commitment, and the PMI-LA Chapter will cover the costs relating to attendance in compliance with PMI-LA policies.

2.3.5.5. EXPENSES NOT COVERED

See Appendix B for expenses that will not be reimbursed.

2.4. BUDGET

A budget for the corporation shall be created and approved annually at the beginning of the term by the Board of Directors. The budget governs all expenditures. Any expenditure over budget will not be paid until it has been authorized by a vote of the Board. The budget may be updated periodically, including re-balanced department budgets, by a vote of the Board and recorded in meeting minutes.

2.5. VENDOR MANAGEMENT

All vendors of the chapter must be legally authorized to do business in the state of California and must be preapproved by the VP of Finance or the President for any payments to be made for contracted services.

2.5.1. SERVICE VENDORS

A service vendor is defined as a vendor who provides an ongoing service to the chapter. Service vendors may have long-term contracts or annual agreements. Examples of service vendors include Website management, Mailbox service, Partnered ATPs, etc.

All vendors must have a W-9 and a copy of the latest agreement or contract on file with the VP of Finance. If automated payments can be established, the VP of Finance will enable automated payments by PayPal payments, Bank ACH transfers or issuing a check via Bill Pay service. When an automated payment is complete, an invoice is required for documentation.

Approved vendors will be set up in QuickBooks for tracking. An annual review of these vendors will be completed to confirm they are still active. If agreements or contracts have expired, a new contract will be required before additional payments can be made to the vendor.

2.5.2. THIRD-PARTY ENGAGEMENT FOR EVENTS

Vendors hired for a specific event include speakers, sponsors, venues, caterers, etc. These vendors usually have contracts for a single engagement.

For speakers and sponsors, a Memorandum of Understanding (MOU) is required outlining the agreement between both parties when a financial transaction is under discussion. Pro Bono engagements with speakers do not require a MOU. These vendors will be tracked in QuickBooks and a W-9 is required for reporting purposes. Payments to speakers are usually made via PayPal or Zelle, as outlined in the MOU. Payments from sponsors are collected via PayPal billing or check payment.

For venues and caterers, a documented agreement of terms and itemized billing is required for any financial transactions to be completed. These vendors are not tracked in QuickBooks and purchases are tracked as expenses. All expenses for these engagements should be submitted via Zoho for approval and reimbursement. The chapter credit card may be used for payment for these vendors.

3. TREASURY PROCESSES AND CONTROLS

All bank and investment accounts of the PMI-LA Chapter are controlled by current officers of the Chapter and at minimum the VP Finance and the President are signatories, with the exception of the non-operating savings account.

Only the VP Finance and the President are authorized to open or close cash or investment accounts for the Chapter and only upon approval from the Board of Directors and documentation in the BOD meeting minutes.

The total balance for each bank account must be kept under the FDIC insurance limit.

Chapter funds may only be deposited into or transferred between chapter-owned accounts. Transfers between accounts within the same department shall be reported to the Board as part of the quarterly financial report and shall not exceed the pre-approved total value within a department without Board approval.

3.1. OPERATING ACCOUNTS

Three members of the board of directors are bank signatories, authorized to make transactions and decisions regarding the operating accounts. These members are the President, VP Operations/President-Elect, and VP of Finance.

3.1.1. CREDIT CARD ACCOUNTS

The primary and only chapter credit card will be maintained under the name of the current PMI-LA VP of Finance.

The Board of Directors delegates to the card holder the signature authorization for making purchases that are pre-approved by the PMI-LA BoD.

3.1.1.1. AUTHORITY AND RESPONSIBILITIES

The card holder acts as individual purchasing agent of PMI-LA and may not lend or share the card. The card holder has personal responsibility regarding non-compliant or fraudulent activity incurred on the card, and they must keep the card secure and the card number confidential.

The card holder must observe all PMI-LA policies and procedures related to purchases, as well as all government laws and regulations (state and federal) that apply to the commercial transactions placed via the chapter credit card.

All transactions are subject to review by the PMI-LA Board of Directors, as well as by other internal and external auditors, for compliance with sound business practices, PMI-LA policies and procedures, and any applicable laws and regulations. As such, an alert will be maintained for any transactions over \$1 to be sent to finance@pmi-la.org email address as a notification of use of the card.

The board will coordinate punitive measures to any card holder who fails to comply with PMI-LA policies and regulations. This may include, but will not be limited to, revoking the card.

3.1.1.2. AUTOMATIC PAYMENTS

Automatic payments for PMI-LA expenses may be set up with a chapter credit card, subject to the following guidelines:

- a. The payments must be deemed necessary and pre-approved by the VP of Finance.
- b. A list of all automatic payments must be maintained that includes the supplier's name and contact information, the service or other purpose of the payment, and the frequency and approximate amount of the payment.
- c. All automatic payments shall be reconciled monthly, and invoices shall be attached to the transactions from the supplier/vendor.
- d. Automatic/recurring transactions may not exceed \$1,000 in a single transaction. These transactions will need to be paid as the invoice is received and reviewed.

3.1.1.3. EXCLUSIONS

The chapter credit card may NOT be used for the following categories of purchases:

- a) Personal Expenses (purchases that are not made on behalf of PMI-LA or for use by PMI-LA).
- b) Any transactions that could include personal expenses (such as event refreshments, meals, etc.).
- c) Hazardous Materials (which may include chemicals, compressed gases, radioactive materials, nucleotides, peptides, growth media, controlled substances, restriction enzymes, or biological organisms, as defined by federal and state regulations).
- d) Cash advances.

3.2. NON-OPERATING ACCOUNTS

The purpose of the Non-Operating Account(s) is to serve as the official reserve fund for the chapter. It is established with the express use of reviving the chapter after catastrophic financial loss.

The Board of Directors does not have access to this account(s). This protects the chapter in the event of embezzlement or bad financial decisions from the current officers.

One to two Trustees are selected by the BOD as signatories for the Non-Operating account(s) as needed on an annual basis. One of these Trustees must send financial statements to the VP of Finance upon request. If one of these trustees must abdicate the responsibility, the BOD may select a replacement. There is no limit to how many years a Trustee may be a signatory.

3.3. MANAGEMENT OF ACCOUNTS

The VP of Finance will have access to and responsibility for all financial accounts for the Chapter, with statement access for the Non-Operating Account(s).

3.3.1. GENERAL FINANCE RESERVES

A General Financial Reserve of 200% of the previous year's approved actual expenditures of the corporation shall be maintained on an ongoing basis; one year minimum in the Operating accounts; one year minimum in the Non-Operating accounts.

3.3.2. SPECIFIC FINANCIAL RESERVES

The Board may elect to create one or more separate, additional "Specific Financial Reserves" for a designated purpose that is for the benefit of the members.

3.3.2.1. DISSOLUTION OF THE CHAPTER

Should the chapter be dissolved, PMI Staff and the current Region 7 Mentor will work with the existing board and trustees to put all funds into the central checking account as per the following:

"Should the PMI-LA Chapter dissolve for any reason, after the payment of just, reasonable and supported debts, consistent with applicable legal requirements, the assets of the PMI-LA Chapter shall be distributed for use in furtherance of the purposes of the corporation set forth in Article II of the PMI-LA Articles of Incorporation to a nonprofit fund, foundation, or a corporation which has established its tax-exempt status."

3.3.3. INVESTMENTS

Certificates of Deposit are the only form of investment in which the PMI-LA Chapter will engage.

If the BOD votes to purchase additional CDs, the amount is documented in the minutes, and the VP of Finance coordinates the transfer of funds into the appropriate Non-Operating account in coordination with the two designated Trustees.

Each CD shall be set to add interest to the principal and compound monthly, adding to the value of the CD at every renewal period.

3.4. INSURANCE FOR CORPORATE FUNDS

Corporate insurance is purchased through and managed by Global PMI on an annual basis. Corporate insurance shall be budgeted and maintained by the VP of Finance as determined by the Board of Directors, which may include but is not limited to General Liability Insurance, Officers and Directors Insurance, etc.

3.5. FIXED ASSETS

3.5.1. FIXED ASSETS ADDITIONS

As of 2022, the chapter does not own any fixed assets that follow a depreciation schedule. Any new additions must be approved by the Board of Directors prior to purchase.

3.5.2. FIXED ASSETS DISPOSALS

Disposal of fixed assets must be initiated by a Board member and approved by the VP Finance on a Fixed Asset Disposal form, prior to disposal or removal from the fixed asset spreadsheet.

3.6. FINANCIAL SERVICES

All financial services provided by external parties shall be set up in the name of the corporation, not in the name of the individual initiating or administering the service.

4. FINANCIAL RECORDS

4.1. MAINTENANCE OF FINANCIAL RECORDS

Financial records shall be prepared and maintained by the VP of Finance and may be assisted by the Finance Team.

Financial records will be securely stored in a central location accessible to the necessary board members for a period of 7 years. A digital copy of bank records shall be made before hard copies are disposed.

4.2. FINANCIAL STATEMENTS

4.2.1. FINANCIAL STATEMENT PREPARATION

Financial reports will be issued to the Board monthly, including Bank Statements for operating accounts, PayPal statements, Balance Sheet, Profit and Loss Statement and Budget to Actual.

The Board of Directors must review the financial statements with the VP of Finance during the two Strategy sessions organized by the VP of Operations / President Elect. If any changes are required as a result of the meeting, the changes are made by the Finance Team and VP of Finance and a final draft is provided to the Board of Directors to review at the next Board meeting.

Annual financial reports will be reported to the Chapter at the January meeting.

4.2.2. COMMITMENTS AND CONTINGENCIES

4.2.2.1. CONTRACT APPROVAL

See authorization matrix (Appendix A).

4.2.2.2. DEBT AGREEMENTS

PMI-LA shall not enter into any debt agreements.

4.2.2.3. BOARD AUTHORITY

No employee, agent, independent contractor, or other representative of the organization shall bind the organization to any contract involving a financial commitment of the organization except upon the authorization of the Board of Directors or in the approved budget.

4.3. BANK RECORDS

Bank records may be viewed by any chapter member upon receipt of a written request to the President or VP of Finance.

Copies of the bank records shall only be distributed under the supervision of the VP of Finance.

4.4. TAX RECORDS

Federal and state income tax records shall be filed by the President or VP of Finance according to the applicable rule of law.

Federal tax exemption status shall be accomplished by the President or VP of Finance through the group filing performed by Project Management Institute, Inc. as needed by applicable rule of law.

State tax exemption status shall be accomplished by the President, or the VP of Finance as required by the State of California.

Federal and state income tax records shall be filed by the VP of Finance with the Project Management Institute, Inc. as required by the PMI Charter.

The Statement of Incorporation shall be updated as required with the State of California, including the payment of applicable fees, by the President or the VP of Finance on behalf of the corporation.

If necessary, employment tax payments and filings will be made by the President or the VP of Finance for any employees or contractors of the corporation, as required by law.

5. FINANCE TEAM AND COMMITTEES

5.1. VICE PRESIDENT OF FINANCE

The Vice President of Finance is an elected member of the PMI-LA Chapter Board of Directors. The VP Finance performs financial activities on behalf of the chapter in accordance with the by-laws.

5.2. ASSOCIATE VICE PRESIDENT OF FINANCE

The AVP Finance is appointed by the VP Finance to perform financial operations duties and maintain the separation of duties as required by GAAP.

5.3. FINANCE TEAM

A Finance Team supports the VP Finance to fulfill their responsibility to oversee the Chapter's financial strategy and performance.

The Finance Team includes the following members: VP Finance, Associate VP Finance, and others as assigned by VP Finance.

The Finance Team has no independent authority to commit the resources of the Chapter or to transact business on behalf of the Chapter without prior authorization from the VP Finance, the Chapter President, or the Board.

5.3.1. ADDITIONAL EXPENSES AND FUNDING

All expenses for the team shall be funded from within the budget of the VP of Finance.

5.4. INDEPENDENT AUDIT OR REVIEW

The VP of Finance will ensure an independent financial audit or review will be performed at least every three years. The independent auditor will present its report to the board by the end of the fiscal year.

The independent auditor will be supported by the VP of Finance, the AVP of Finance, the members of the Finance Team and by the immediate prior year VP of Finance.

In intervening years, the Finance Team will perform a risk-based self-audit.

The VP of Finance and/or Board of Directors has the authority to recommend and budget for more frequent independent audits.

The Finance Team will perform self-audits of key reports and disclosures and will implement internal monitoring controls.

6. APPENDIX

APPENDIX A: AUTHORIZATION MATRIX

| Type | Included in Approved Budget? | Approval | Signature after budget and approvals |
|--|-------------------------------------|--|---|
| Contracts Less than \$10,000 | Required | Approval in writing by VP Finance and VP of the department | VP of Department or VP Finance |
| Contracts \$10,000 or more | Required | Approval by Board and documented in meeting minutes or summary of ballot | Chapter President and VP Finance |
| Manual or Electronic Payment (check via Bill Pay or transfer via Zelle), less than \$1,000 | Required | Documented approval by VP Finance and VP of the department | VP Finance |
| Manual or Electronic Payment (check via Bill Pay or transfer via Zelle), \$1,000 or more | Required | Documented approval by VP Finance, VP of the department, and Chapter President | VP Finance |
| Chapter Credit Card Payment | Required | Documented approval by VP of the department | Chapter President |
| VP Finance Expense Reimbursement via manual check, check via Bill Pay, or Zelle | Generally | Included in budget or approved by separate action of the Board and documented. Approval in writing by Chapter President | Chapter President |

APPENDIX B: EXAMPLES OF VOLUNTEER EXPENSES THAT WILL NOT BE REIMBURSED

| | |
|--|---|
| Automobile Expenses | <ul style="list-style-type: none"> a) Parking tickets, fines or fees b) Gas fill-up when mileage is covered. c) Wear and tear of vehicle d) Mileage or auto rentals for normal business activities (excludes conference travel required by PMI-LA) such as to attend chapter events, team trainings, or completing operational tasks of your board position (bank, post office) |
| Entertainment / Business Meals | <ul style="list-style-type: none"> a) Meals when provided by the Chapter or hosted event, excluding considerations for special dietary restrictions. b) Personal Alcoholic beverages (bar tabs). c) Personal entertainment expenses (concerts, shows, sporting events, etc.) d) Tips on receipts in excess of 20% |
| Travel | <ul style="list-style-type: none"> a) Upgrades for flights or hotels b) Incidentals c) Costs for additional person(s) joining the volunteer |
| Continuing Education | <ul style="list-style-type: none"> a) Fines or fees for cancelations unless requested by PMI-LA |
| Travel related to special activities that fall outside of or exceeds expected execution of a volunteer's commitment(s) | <ul style="list-style-type: none"> a) Travel to represent the Chapter or to perform presentations at third-party sites on behalf of the Chapter. b) Travel to PMI Global Events and LIM meetings not authorized by the BoD. c) Travel to meetings with partners, vendors, sponsors, or exhibitors (i.e., for the purpose of negotiating contracts, etc.). |
| Other Personal Expenses | <ul style="list-style-type: none"> a) Personal expenses while traveling (i.e., gym fees, dry cleaning, movie rentals) b) Credit card membership fees c) Late charges on personal credit cards d) Telecommunications: Home internet access, land lines, cell phones, etc. |