



## **Travel Policy**

### **I. Introduction**

This policy sets forth the parameters for incurred expenses for individuals traveling on behalf of NAEP.

### **II. Coverage**

Expenses for authorized individuals traveling on behalf of NAEP are covered under this policy. The expenses for any guests, including spouses and dependents, accompanying the traveler shall be the responsibility of the traveler.

Travel begins at the starting location of a trip, whether it is from the traveler's regular place of employment, home, or other location. It terminates when the traveler reaches either home or office.

When a trip involves traveling for both NAEP and other purposes, the traveler will reasonably allocate the costs between NAEP and other activities.

### **III. Travel Authorization**

Only travel authorized by NAEP will be reimbursed.

Directors and Officers

A travel authorization is required when travel is outside of the routine fulfillment of the individual's Board duties. Regular duties include, but are not limited to Board Meetings, Regional Meeting Attendance, and Association Leaders Program (ALP).

For requests outside of routine fulfillment of duties, the individual should complete the "Travel Request and Report Form" outlining the purpose of the travel, benefit to NAEP, and associated cost. Completed forms should be submitted to the NAEP President and cc'd to the Executive Director for tracking purposes.

Upon return, the traveler will complete the Report section of the form according to the instructions provided on the form.

#### Volunteers

It may be necessary for the execution of the strategic work of the organization for volunteers to travel on behalf of the organization. Only travel authorized by the NAEP Board Executive Committee shall be reimbursed.

The individual traveler must complete the "Travel Request and Report Form" outlining the purpose of the travel, the benefit to NAEP, and associated cost before travel and seek approval. Completed forms must be submitted to the NAEP President and cc'd to the Executive Director for tracking purposes. The form will be returned either approved or declined.

Upon return, the traveler will complete the Report section of the form according to the instructions provided on the form.

#### Speakers and Other Third Parties

Any speaker or third-party contract for whom NAEP is reimbursing travel expenses shall follow this policy unless otherwise provided for in the terms of their Agreement with NAEP.

NAEP Employees are covered under a separate policy.

#### **IV. Reimbursement**

Travelers shall complete the NAEP Reimbursement Form to request travel reimbursement. NAEP requires that requests for reimbursement to individuals be substantiated with original itemized receipts or copies for all expenditures. Original or copied invoices and receipts must not be altered. Photographs of the receipt are acceptable provided that they are legible and include an itemized accounting of the expenses incurred. For online purchases, a print of the confirmation screen or e-mail acknowledgment is acceptable.

Requests for reimbursement must be submitted within thirty (30) days of the event for which reimbursable expenses were incurred.

## **V. Covered Expenses**

### **A. Air/Train Travel**

NAEP will reimburse the traveler for the most economical airfare plus baggage fees. As it is important for those traveling on behalf of NAEP to arrive safely and expediently, and as each airline differs, travelers are expected to assess their needs and select the best airline and fare. NAEP will reimburse for airfare level which assures the traveler a seat on the flight. NAEP will reimburse for flight changes which are a result of 1.) unexpected changes to the traveler's duties, 2.) flight cancellations, 3.) flight delays which inhibit the traveler from arriving in time to perform the purpose of the travel, or 4.) other unavoidable changes.

Any costs related to premium seating (first-class, exit row, economy-plus) are the responsibility of the traveler. Travelers may use their travel agency or book online to obtain the most economical coach fares.

Reservations should be booked at least 30 days in advance of the travel date for the best fares.

NAEP flights booked with personal travel is permitted. The traveler should document the difference between a direct flight and the combined flight and submit with their travel reimbursement. The traveler is expected to cover any additional cost incurred as a result of combining NAEP and personal travel.

### **B. Vehicle Use**

The use of a personal or institutional vehicle will be reimbursed at the mileage rate consistent with IRS rules and regulations plus toll and parking charges. Mileage should be documented using Google Maps or another tool to demonstrate distance. Documentation should be included with the traveler's travel reimbursement request.

When a personal or institutional automobile is used for transportation and the distance to be traveled is more than 300 miles, transportation reimbursement will be made at the lesser of coach airfare or the NAEP mileage allowance. Only under unusual circumstances, and with prior approval, will NAEP reimburse

the costs of vehicle rental shall be pre-approved by the NAEP President submitted via the “Travel Request and Report Form” and cc’d to the Executive Director for tracking.

### **C. Hotel**

Individuals are responsible for obtaining their hotel accommodations at least 30 days before travel. NAEP will reimburse the traveler for the hotel’s basic room and tax charges. If NAEP has negotiated a group rate with the hotel, the traveler shall book the room under the negotiated rate.

NAEP may pre-negotiate a room block where feasible and in the best interest of NAEP. In the event of a pre-negotiated room block, communication will be distributed that the traveler will not need to book his/her hotel room and NAEP Staff will book hotel rooms for all travelers to best manage the established room block. NAEP will also communicate the number of nights covered and any other logistical information to the traveler.

Room upgrades, concierge service, or other upgrade fees will not be reimbursed by NAEP and shall be the responsibility of the traveler.

Personal fees such as mini-bar, room service, movie rentals, and health club fees are not reimbursable.

NAEP will communicate travel dates to the travel. Hotel room nights outside the established covered nights will be the responsibility of the traveler unless the NAEP President and Executive Director grant a waiver.

For pre-negotiated room blocks, NAEP establishes as a part of the room block pre and post-event date room rates. Travelers wishing to take advantage of these rates shall be responsible for all expenses incurred during the extended stay and shall pay for said stay via a personal credit card or another form of payment acceptable to the hotel.

### **D. Meals**

#### **Individual Meals**

NAEP will reimburse meal expenses, including tips, according to actual costs up to a daily limit of \$75.

For individual meals within the daily limit:

Breakfast    \$15

Lunch        \$20

Dinner       \$40

Meals provided as a part of NAEP programming are excluded from meals eligible for reimbursement unless the traveler is engaged in other NAEP business at the time of the meal.

#### Group Meals

Either as a part of NAEP programming or for other business purposes, NAEP may schedule group meals. Scheduled group meals are excluded from meals eligible for reimbursement unless the traveler is engaged in other NAEP business at the time of the meal.

Individuals paying for group meals must list the names of the persons for whom the meals are paid and affiliations on the receipt and list the purpose of the group meal. For meals, including the Executive Director, the Executive Director shall use his/her NAEP credit card to pay for the meal. For meals not including the Executive Director, the President, or another officer of the Board with a NAEP credit card will pay for the meal.

If an individual anticipates that the cost of a group meal will exceed the above limits, they should speak with the Executive Director, Director of Finance and Strategic Initiatives, President, or other Board Officer.

#### **E. Internet**

NAEP will reimburse reasonable business expenses for an internet connection during travel days provided the internet is to be used for business purposes. NAEP will not reimburse for telephone calls.

#### **F. Transportation**

NAEP will reimburse transportation and parking expenses. Travelers are expected to utilize the most economical transportation method that suits the traveler's needs and business purpose. This includes, but is not limited to bus, taxi, Uber/Lyft, rideshare, train, or shuttle.

## **F. Miscellaneous Expenses**

Baggage service, up to a maximum of \$5 per day, and similar expenses are reimbursable.

Tips not included with other reimbursable should be listed separately on the NAEP Expense Report. Tips over twenty percent are not reimbursable. Travelers may round up to the next whole dollar.

## **VI. Travel Rewards**

Any travel rewards earned by travelers using their personal or institutional credit cards are the property of the traveler.

Travel rewards earned by travelers and paid for by NAEP either through pre-payment or credit card are the property of NAEP.

## **VII. Submitting Expense Reports**

A credit card is the preferred form of payment for travel for those issued NAEP credit cards.

All traveler expense reports should be submitted to the Executive Director and Director of Finance and Strategic Initiatives for review and oversight.

Officers with NAEP credit card expenses will receive a copy of the monthly credit card statement; however, Officers may submit receipts at any time. Officers will submit both credit card and reimbursement requests to the NAEP President and Treasurer. The Officer should cc the Executive Director for tracking purposes. The President will submit his/her travel expenses to the Treasurer. After approval, expenses will be forwarded to the Director of Finance and Strategic Initiatives for processing.

The Executive Director will submit travel expenses to the NAEP President and Treasurer. After approval, expenses will be forwarded to the Director of Finance and Strategic Initiatives for processing.