



Association for Information Science and Technology

## ASIS&T Travel and Expense Guidelines

ASIS&T's Travel and Expense Guidelines require individuals travelling on behalf of ASIS&T to steward the association's resources by following procedures for making and reporting travel and other business-related expenses.

### Objectives

The purpose of the guidelines is threefold:

- To ensure guidelines support ASIS&T staff and volunteers in performing at their best in the office and while traveling on business.
- To mitigate the impacts of travel on staff and volunteers and support them in integrating and managing their work and personal lives.
- To ensure that procedures are appropriate relative to the sector in which we work, including other associations, foundations, and nonprofit organizations.

ASIS&T assumes that staff and volunteers will use their best judgment when traveling or spending money in support of association-related business. This procedure provides specific guidelines on traveler reporting responsibilities, air and ground travel, lodging, meals, tipping, visas and passports, combining business and personal travel, non-reimbursable expenses, insurance, and other business-related expenses.

Thank you for your commitment to further the association's mission through your thoughtful and ethical use of association resources when traveling or incurring expenses in support of ASIS&T business.

### General Travel Information:

- 1. Travel Arrangements:** Travel arrangements can be made by the individual traveler within the guidelines detailed in this policy document. In situations where a volunteer or speaker is traveling on behalf of ASIS&T, it may be prudent for ASIS&T Central to make the travel arrangements in order to obtain the best fares and minimize out-of-pocket costs for the traveler.
- 2. Travel preference:** Staff and volunteers may utilize preferred travel methods such as air, rental car, personal car, etc. Consideration should be given to the amount of time needed for the travel. The Association will pay/reimburse up to the amount of the most cost-effective method.
- 3. Passports:** Staff traveling internationally should check that their passport is current with at least 6-month validity.
- 4. Accidental Death and Dismemberment Benefit:** ASIS&T provides Accidental Death and Dismemberment benefits to each full-time employee in addition to their Life Insurance Policy.
- 5. Personal and Official Travel:** Staff and volunteers are free to extend trips for personal reasons, such as vacation. The travel costs of extending are not reimbursable and should be paid directly by the traveler. If travelers wish to append ASIS&T travel to another trip ASIS&T will reimburse the lowest-cost roundtrip fare for the ASIS&T-related travel.

## **Air Transportation:**

In order to optimize cost savings for the association, staff and volunteers should make travel arrangements 21 or more days in advance of domestic travel and 30 or more days in advance of international travel.

Travel itineraries are based on, and in order of: 1) non-stop routes, 2) lowest possible reasonable fare available at time of booking and the individual's preferred carriers, and 3) flights available 2-hours before and 2-hours after the requested flight time.

1. **Air Mileage Programs:** the traveler retains airline miles earned while traveling on association business. Frequent flyer miles are not reimbursable by the association, even if they are used on association business, without prior consent of the executive director/or designate.
2. **Domestic Flights:** Non-refundable economy class is the booking class for all domestic flights. If schedules necessitate booking a red-eye, the purchase of an upgraded economy seat is approved (similar to Delta's or United's Economy Plus products). If a medical condition necessitates upgraded travel, you must obtain a physician's order and have approval from Executive Director or designee prior to booking.
  - a. Basic Economy Fares: travel on "basic economy" fares is not required. Basic economy fares are represented by fare code "E" on Delta, "N" on United, and "B" on American. These fares usually do not allow seat assignment nor carry-on luggage in the aircraft cabin.
  - b. Economy Airlines: Travelers are not required to use economy airlines like Spirit, Allegiant, JetBlue, etc. even when the fare is lower than other options.
  - c. Travelers are expected to be able to assign a seat at the time of booking and be permitted to bring one carry on and one personal item onto the aircraft without paying any fees or surcharges and may appropriately choose fares that include these services.
  - d. All airfares in excess of \$700 for domestic and \$1,500 for international must be approved by the Executive Director prior to booking.
3. **Personal Upgrades:** Personal miles or coupons can be used to upgrade to first class, or the traveler may opt to pay personally for the price difference between coach and first class. If the traveler wishes to purchase a first-class ticket, the traveler must use their personal credit card to purchase the ticket and then request reimbursement for the value of the prevailing non-refundable economy class fare from ASIS&T.
4. **International Flights:** Economy comfort seats may be booked for international flights, including the domestic connecting flights with prior permission. If a medical condition necessitates upgraded travel, the same guidelines apply for domestic flights.
5. **Cancellation:** If you need to cancel an airfare reservation, you should do so through the airline. Domestic airline tickets are often non-refundable, and cancelled reservations will result in an airfare credit being issued which can be used by the ticketed passenger within a calendar year and subject to individual airline requirements. The travel confirmation will indicate the fare type and rules. If the value of a cancelled ticket is to be used for a different program or in a different fiscal year than originally ticketed, notify the accounting department so the necessary transactions can take place.

## **Ground Transportation:**

The most cost-effective, safe, and efficient ground transportation is to be used.

1. **Train:** ASIS&T will reimburse the cost of travel by train for non-business/first class fares when train travel is the most economical and expedient means of travel available, either as part of a journey or as the sole means of travel.

2. **Shuttle, Taxi and Ride Share:** Shuttles, Taxis and Ride Share Services are the preferred local transportation method.
3. **Rental Car:** Use of a rental car in lieu of airline or train will be approved if the total cost of rental plus parking is less than the cost of air or train fare. Use of a rental car for local transportation will be approved if the total cost of rental plus parking is less than the anticipated round-trip cost of a shuttle, taxi or ride share service or if a vehicle is required throughout the stay. The size and type of the rental car should be appropriate for the number of people in the car, road conditions, and cargo being carried. Electronic toll payment options for rental cars are considered reimbursable (or included in the rental agreement). When renting cars in the United States, you should not purchase rental car insurance, which is already covered by ASIS&T's insurance policies. ASIS&T will reimburse the cost of tolls not paid on an electronic toll payment device.
4. **Mileage Reimbursement:** Use of a personal vehicle in lieu of airline or train will be approved if the total cost of mileage plus parking is less than the cost of airfare, train fare, or use of a rental car. Miles driven in the traveler's personal vehicle are reimbursed at the [prevailing US-GSA rate](#) in effect at the time of the trip. Keep in mind that for travel over 100 miles in a day, a rental car is typically a more cost-effective means of travel than using a personal vehicle.
5. **Parking at the airport:** In general, economy surface lots should be used to park personal vehicles at the airport. However, if the traveler would like to pay the difference between economy and an upgraded parking location, they may do so.
6. **Other:** Whenever possible, travelers should make every effort to minimize ground transportation costs by travelling together.

#### Hotel:

1. **Hotel Type:** Quality and safe lodging is important to the health and safety of our staff and volunteers. While travelers should use their best judgment when selecting a hotel, special consideration should be given to:
  - a. **Conference Hotel:** If a meeting has specified a particular property. All ASIS&T-funded travelers must use the meeting venue when traveling to the Annual Meeting on those nights covered by ASIS&T funds.
  - b. **Convenience:** How close the property is to the event, meeting, or other factors
  - c. **Hotel Ratings:** ASIS&T does not expect or require travelers to stay at a hotel rated less than three stars. ASIS&T has a frequent guest program with Hyatt and may be able to book free nights on points.
  - d. **Room Type:** Staff should book the best rate available for a single room of their choice. Suites (unless the same rate as the single room), paid upgrades, or paid access to executive lounges are not approved expenditures.
  - e. **Hotel Reward Points:** the traveler retains hotel points earned while traveling on association business. An traveler may not use personal hotel points for official association business and expect to be reimbursed by the Association.
2. **Hotel Parking:** In general, self-parking should be utilized during hotel stays. However, the traveler's safety and well-being should always be at the forefront of this decision. Factors that may warrant valet parking include, but are not limited to, inclement weather, loading/unloading, and personal safety and security.

#### Meals

1. **Per Diem:** Actual expenses for food and non-alcoholic beverages will be reimbursed up to \$66 per day. Staff are entitled to spend up to the full per diem for each full day of travel except for meals that are already provided (i.e. at a conference or meeting) which will be deducted using the following breakdown of breakfast @ \$15, lunch @ \$20 and

dinner @ \$31. This breakdown will also be used to calculate reimbursement for meals on the first and last days of travel that do not encompass a full day. Any travel occurring after midnight (i.e. redeye flight) counts as an additional travel day for the purposes of per diem.

- 2. Entertaining Guests:** When appropriate, ASIS&T staff may offer to host volunteers, members, or other Association guests for meals when travelling or when they visit the Washington area, up to the annually budgeted amount and in line with the per diem noted above. Pre-approval must be obtained from the Executive Director or President.

### **Miscellaneous Reimbursable Expenses**

The following are considered approved expenditures or reimbursements:

1. Internet connectivity in hotels, aircraft, and other public places if required to conduct ASIS&T business
2. Checked baggage fees (limit 1 bag unless previously approved)
3. Overweight and/or excess baggage is allowed if the overage is due to Association business
4. Travel immunizations required for business related international travel
5. Travel visas required for business related international travel (staff only)

### **Miscellaneous Non-Reimbursable Expenses**

The following expenses are not reimbursable:

1. Out-of-pocket expenses submitted more than 45 days after they were incurred
2. Expenses without receipts
3. Lost luggage and contents
4. Fees or dues for airline VIP clubs/lounges and hotel loyalty or frequent-stayer programs
5. Air travel insurance
6. Health club access, health spa services, e.g. massages, manicures, personal training
7. Costs for personal guests, spouses, partners, or family members
8. Normal commuting costs
9. Parking citations and traffic fines
10. Cost of business clothing
11. Pet boarding while travelling on Association business
12. Child care while travelling on Association business
13. Housesitting while travelling on Association business
14. Alcoholic beverages and mini-bar charges
15. Movies or other in-room entertainment
16. Tours and sightseeing, except as required to develop programs for ASIS&T Annual Meeting attendees
17. Toiletries and medications
18. Credit card fees
19. ATM Fees
- 20.** Any other expenses not detailed above or pre-approved by the Executive Director (or Treasurer in the case of ED travel)

### **Expense reporting/receipts:**

Requests for reimbursement must be submitted on an [ASIS&T Travel Expense Form](#). All charges except tips and tolls require a receipt supporting the expense. As required under IRS

guidelines, receipts for meals shall be detailed showing individual food or beverage items. Hotel receipts shall include a detailed breakdown of all expenses.

Expense reports (with attached receipts documenting all costs) are due to [the ASIS&T office](#) within 30 days of the completed travel. This ensures timely reimbursement and accurate record keeping. Submissions may be made by email with scanned receipts, but please keep original receipts until reimbursement is completed. Expense reports should be submitted in US\$ with appropriate amounts noted on receipts that show non-US\$ totals. Exchange rate should be based on the [prevailing exchange rate](#) at the time of travel. Reimbursement checks and transfers are typically issued within 10 business days of ASIS&T management's receipt of vouchers. Reimbursement will be made by check whenever possible. When reimbursing by ACH or wire transfer, ASIS&T will assume the cost of the transfer.

**Exceptions:**

Exceptions to any travel reimbursement policy must be requested in writing and approved in advance by the Executive Director, unless such reimbursement pertains to the Executive Director, in which case the request must be approved by the Treasurer.

**Maximum Expenditure:**

For travel other than by the Board to the Annual Meeting, the maximum claim should not exceed the amount budgeted or negotiated for the trip. For guidance on the budgeted/negotiated amount, please contact [lmiddleton@asist.org](mailto:lmiddleton@asist.org).

For travel by members of the Board of Directors to the Annual Meeting, the following caps apply:

<b>One-way Distance to Meeting</b>	<b>Tenure of Board Member</b>	<b>Cap*</b>
6,000+ Miles	Board member prior to and after Annual Meeting	\$2,200
6,000+ Miles	Leaving Board after Annual Meeting	\$2,000
6,000+ Miles	Joining Board after Annual Meeting	\$1,800
4,001 – 6,000 Miles	Board member prior to and after Annual Meeting	\$1,800
4,001 – 6,000 Miles	Leaving Board after Annual Meeting	\$1,600
4,001 – 6,000 Miles	Joining Board after Annual Meeting	\$1,400
2,501 – 4,000 Miles	Board member prior to and after Annual Meeting	\$1,400
2,501 – 4,000 Miles	Leaving Board after Annual Meeting	\$1,200
2,501 – 4,000 Miles	Joining Board after Annual Meeting	\$1,000
Up to 2,500 Miles	Board member prior to and after Annual Meeting	\$1,000
Up to 2,500 Miles	Leaving Board after Annual Meeting	\$800
Up to 2,500 Miles	Joining Board after Annual Meeting	\$600

\*Cap includes up to 3 hotel room nights for Board members who are on the Board prior to and after the Annual Meeting, 2 hotel room nights for Board members who leave the Board after the Annual Meeting, and 1 hotel room night for Board members who join the Board after the Annual Meeting.

*Approved by the ASIS&T Executive Committee May 21, 2019*