



TRAVEL

March, 2009

Modified November 2013

I. Policy Statement:

The Central Coast Human Resources Association (CCHRA) believes that it is incumbent on each CCHRA board member to economize as much as is reasonable on all travel-related expenses.

II. Definition:

Travel guidelines pertain to conference attendance or travel made on behalf of and in connection with CCHRA business. This policy pertains to all travel that has been approved prior to the event.

A. Administrative Guidelines:

1. The CCHRA will reimburse board members for all ordinary and necessary expenses incurred for approved conference attendance (such as the Legislative Conference), State Council meetings (attended by the President and/or President Elect - or another board member in his/her place), or made on behalf of and in connection with CCHRA business.
2. All reimbursed expenditures must be approved by the Treasurer.
3. The Treasurer is responsible for interpreting this policy and for establishing the forms and controls necessary for proper administration of this policy.
4. Approval to deviate from this policy can be given by the President, Past President, and/or Treasurer.
5. Travel advances are not given by CCHRA. Board members are expected to have credit cards available for payment of airfare, hotel, restaurant charges, and other incidental charges such as cab or bus fare.

B. Expense Reports:

1. All allowable travel expenses not paid directly by CCHRA should be submitted on an expense reimbursement form, usually within two weeks of travel. All expenses must be explained in detail.
2. Timely submission of expense reports is critical for CCHRA in order to track expenses and make accurate financial reports.
3. Expense reimbursement forms should be sent to the Treasurer who may reject items that are disallowed by this policy, or are not reasonable, necessary and legitimate. Incorrect or inadequate expense vouchers will be returned to the member for correction.
4. Receipts must be attached to expense reimbursement forms for all expense items where receipts are normally available. Expense items not having a receipt may not be reimbursed, at the discretion of the Treasurer.

C. Travel Expense Guidelines:

1. Coordination of Travel Plans

When two or more board members are traveling to a conference, all efforts must be made to take personal vehicles, share rental vehicles or taxis when needed. It is at the discretion of the Treasurer to disallow certain expenses if they were incurred due to a lack of careful coordination.

2. Air Travel

Board members will reserve standard or discount (where possible) coach class tickets. Ticket costs, not members' participation in airline bonus programs, will determine the particular reservation on a carrier. Discount fares should be used whenever possible and practical.

If discount reservations include a non-refundable portion in the event of change or cancellation, board member will be responsible for such charges, except in the case of an emergency, or in the event that CCHRA business meeting/conference is canceled.

3. Ground Transportation

Board members should utilize mass transit or airport shuttles whenever possible. There will be no reimbursement for local transportation incurred for non-CCHRA business or events.

Airport shuttles, personal cars, or public transportation must be used for travel from home or one's office to the local airport. Claims for airport shuttle reimbursement may include a gratuity of up to 15%. Long-term parking at airports must be used.

Automobiles should be rented only when they are clearly more economical than available public transportation. If more than one board member is attending a conference, only one rental car will be allowed. That car will be used for all ground transportation.

4. Auto Expense and Mileage

Board members using personal vehicles for transportation beyond normal board business (such as going to the post office or bank) for CCHRA related events are entitled to the allowable IRS business mileage rate consistent with IRS guidelines, plus tolls and parking fees. Members driving for CCHRA purposes are required to carry appropriate standard damage and liability insurance.

5. Hotels

CCHRA will cover the cost of a hotel room up to the budgeted amount. Any additional costs will be incurred by the board member. Board members are responsible for paying all hotel charges as they are checking out of the hotel. Such charges must be included on the expense reimbursement form and supported by an attached hotel bill. Charges other than room and tax must be itemized.

It is the responsibility of the board member to cancel or change hotel reservations. Any charges arising from failure to contact a hotel when there is a guaranteed reservation will be the board member's responsibility.

6. Meals

Board members are expected to partake of meals that are provided by the conference and which are included in the conference fee paid by the CCHRA. Board members will be reimbursed for their daily meal expenses up to the budgeted amount, including gratuities. Alcoholic beverages are not reimbursable expenses.

7. Non-Reimbursable Expenses

Non-CCHRA business expenses such as hotel health club and pool charges, snacks, sundries, alcoholic beverages, parking/traffic citations, and loss/theft of personal property will not be reimbursed.

Other non-reimbursable expenses include any costs arising from the member's absence from home or her place of business. Such expenses would include phone calls, baby/pet sitting fees, telephone, email, and texting expenses, house-sitting arrangements and the loss of wages.

8. Entertainment

Board members will not be reimbursed for entertaining other conference attendees or any other individuals.

9. Miscellaneous

Board members are expected to organize any personal business so that CCHRA business is receiving the fullest possible attention of the member.