



# USEA POLICY

## CORPORATE TRAVEL AND BUSINESS EXPENSE

### **I. Purpose**

To establish a policy for travel and business expenses and to define approval, processing and reporting of these expenses. All travel expenses must be in an approved budget, or approved as an exception to the budget, to assure that the financial resources of the association are used appropriately.

### **II. General Provisions**

Travel is expected to be consistent with the needs of the USEA and should be appropriate to accomplish the association's objectives in a cost-efficient manner. The association will reimburse staff, independent contractors and volunteers for authorized expenses that are reasonable and necessary when traveling on USEA business.

All travel must be in an approved budget or approved by exception in advance by the Chief Executive Officer. Authorization for travel must be completed at least two weeks prior to any trip, except in unusual circumstances.

Business and travel expenses must be properly documented on an Expense Report form for all reimbursements by the USEA or its Areas. It is the responsibility of the traveler to adhere to these policies and to check the accuracy of bills when incurring travel expense on behalf of the USEA. The Expense Report form must be complete and signed.

It is the responsibility of the person approving the Expense Report to be familiar with the travel need and be satisfied that expenses have been reported in a manner consistent with USEA policy.

All separate expenditures of \$10 or more must be supported with an original receipt, including:

- Original flight itinerary and airfare
- Original hotel statement
- Original credit card receipts
- Bus, shuttle, van and taxi receipts
- Receipts for supplies or miscellaneous items purchased for USEA

### **III. Travel Expenses**

Travel expenses should be reported as soon as possible.

#### **A. Transportation**

##### **1. Air Travel**

The standard class of air travel is coach/economy, any exception must be pre-approved by the Chief Executive Officer. Discount fares are to be utilized whenever possible through advance purchases. Staff, independent contractors and volunteers are required to use the lowest reasonable airfare either direct or with connections to minimize travel expenses.

Airfare which is quoted to exceed the budget set forth for the trip must be approved by the USEA Chief Executive Officer prior to purchase.

## 2. Automobile

When a personal automobile is used for USEA purposes, reimbursement will be made for the actual mileage at the IRS business mileage rate, plus tolls and parking. Mileage for personal excursions during the trip is not reimbursable and must not be included in the reported mileage.

Use of a rental automobile must be authorized by the Chief Executive Officer. Staff, independent contractors and volunteers traveling to the same location should coordinate travel plans and share a rental car to minimize costs. Insurance coverage should always be waived for rental cars. The standard car class is "Standard" or smaller.

Consideration should be given to the cost of using a personal vehicle vs. a rental and the least expensive option should be utilized after calculating the distance to be traveled and the number of days the travel will cover.

## 3. Airport bus and van, taxi, hotel shuttle

Public transportation or hotel shuttle should be used where available and practical.

## B. Lodging

The standard class of lodging is at reasonably priced hotels to minimize costs. Any exception to this must be approved in advance by the Chief Executive Officer. It is the traveler's responsibility to cancel guaranteed reservations.

The itemized hotel receipt must be attached to the Expense Report. All personal expenses must be identified and subtracted from the total amount.

## C. Meals and Entertainment Expenses

When allowed by policy, reasonable meal expenses will be reimbursed. The actual cost of such, including tip, is to be shown on the expense report. Alcohol related expenses are not reimbursable.

Generally, an individual who is attending activities such as conventions, seminars, committee meetings, etc., is expected to eat at the planned group meal functions and the cost of meal tickets will be authorized by the Chief Executive Officer. If a meal ticket has been purchased but not used, then a specific explanation is required for any substitute meal expense that is submitted for reimbursement.

Travelers are not to pay for a meal for another person unless specifically approved in advance by the Chief Executive Officer. Entertainment which includes meals for other people must be in the budget or pre-approved by the Chief Executive Officer.

## D. Miscellaneous Expenses

Other reasonable miscellaneous expenses when directly related to the business travel also will be reimbursed.