

Section 8: Finance

8.8 NCSBN Travel Policy

Date of Origin

December 2004

Purpose

To establish criteria for travel expense reimbursements for authorized travelers participating in NCSBN business.

1.0 Policy

- 1.1 Authorized representatives of NCSBN shall be reimbursed for valid organization business travel expenses.
- 1.2 Travel should always be arranged to serve the best interest of NCSBN. To ensure arrangements are properly made (or cancelled), air travel is to be booked through the corporate travel agency only.

2.0 Standards/Criteria

2.1 Airfare

For flights within the continental U.S., the corporate travel agent has been instructed to secure the least expensive direct non-stop commercial airfare in coach class from the airport nearest the traveler's starting location to the airport nearest the destination.

Airline reservations are to be made through the NCSBN corporate travel agency. Upgrades to business or first class will not be reimbursed for U.S. flights. Airline reservations should be made at least 30 days in advance of travel to take advantage of advance-purchase airfares. Any additional expense related to companion travel is the responsibility of the traveler. Travel insurance will not be reimbursed.

2.2 Travel by automobile, train or bus

Total reimbursable expenses, including expenses incurred en route, shall not exceed the cost of airfare. Automobile expenses shall be reimbursed at NCSBN's current mileage reimbursement rate. Any additional expense related to companion travel is the responsibility of the traveler. Travel Insurance is extended to NCSBN international travelers only.

2.3 Airport Transfers and Parking

Ground transportation to and from the hotel will be reimbursed for the least expensive form of transportation. If the meeting hotel offers a complimentary airport shuttle, it should be used. Shuttle, taxi, or personal automobile may be taken to and from the airport at the points of origin and destination if shown to be cost-effective. The following will be reimbursed by NCSBN: taxi fare if essential for business purposes; parking at the airport of origin if personal automobile is used; and parking at the meeting site if travel by automobile is required.

2.4 Hotel and Lodging

All participants in meetings held at the Chicago headquarters are required to stay in the corporate hotel. The travel agency will be directed by the Meetings department regarding approved hotel stays if not at the headquarters hotel. Covered expenses include lodging at the single-room rate for days of meeting, including night before and after if flight schedules make necessary such stays. Upgrades to rooms above NCSBN's contracted rate will be reimbursed at the contracted rate with the traveler responsible for the difference. Any additional expense related to companion travel is the responsibility of the traveler.

2.5 Penalties for air reservation changes or hotel no-show charges are the responsibility of the traveler.

2.6 Meals purchased during NCSBN sponsored meal functions will not be reimbursed.

2.7 Gratuities for meals, transportation and hotel staff are reimbursable by NCSBN. All other gratuities are the responsibility of the traveler. Reasonable telephone and high-speed internet connectivity charges are reimbursable by NCSBN. Mini-bar charges are the responsibility of the traveler. Fitness center charges are not reimbursable by NCSBN. All other incidentals are the responsibility of the traveler.

2.8 Additional persons sharing the travelers' room are the responsibility of the traveler.

3.0 Operational Procedure

3.1 Travel Approval

The NCSBN Meetings department will authorize travel and notify the corporate travel agent of approved travelers. A Call to Meeting will be sent to those traveling to headquarters and other NCSBN sponsored meetings.

3.2 Executive officers of member boards are to notify NCSBN of the NCSBN travel waiver representative's name(s) no less than 30 days before the NCSBN sponsored meeting.

3.3 Once NCSBN member boards have assigned representatives, NCSBN will notify the corporate travel agent of approved travelers and reserve hotel rooms correlating with approved travel dates.

3.4 Expense Report

The NCSBN expense statement is used to document expenses and to request reimbursement. The expense report must be submitted within thirty days of completion of the trip. Explanations for all unusual items or amounts must be provided on the report form or an attachment. Receipts are required for all expenditures paid by the traveler, which exceed \$25. The NCSBN Expense Statement is available on the NCSBN website. The expense statement may be submitted by mail, fax or email:

- a. Mail the form and receipts to NCSBN Accounting Department, 111 East Wacker Drive, Suite 2900, Chicago, IL, 60601;
- b. Fax the form and receipts to 312.279.1032, attention Finance department; or
- c. Scan receipts and email the form and receipts to accounting@ncsbn.org.

Revision Dates

- February 2005
- September 2007
- December 2007
- December 2009
- July 2010
- July 2013
- May 2017

Board of Directors Review Dates

- FY07
- FY11
- FY14
- FY17