



Travel Policy and Guidelines

For Board and Committee Members



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Introduction:

IAATI recognizes the need for members of its International Board and Committees to travel on official business. IAATI is committed to ensuring that all travel and related services are procured as cost effectively and efficiently as possible whilst ensuring the safety and wellbeing of staff.

This policy documents the conditions under which all travel should be approved and booked. It applies to all travel on behalf of the International Board and its committees and all travel arrangements including domestic and international travel.

The purpose of this policy is to ensure that:

- IAATI officials have a clear understanding of the requirements of this policy in relation to travel protocols and administration;
- IAATI achieves the maximum value for money; and
- Effective, efficient and consistent travel management is introduced across the board.

All travel and accommodation arrangements must comply with these Standards.

Note: this policy applies only to travel undertaken and paid for by the International body. Travel conducted on behalf of the individual branches and Chapters may be covered by their own Branch or Chapter Policies.

Approval Process

All travel undertaken by International Board Members or members of any Committee that reports to the International Board, and is to be funded by the Association must adhere to the following guidelines:

1. Where there is no allocated budget for the travel the travel must be approved by the finance committee before any travel can be booked.
2. Where there is a budget allocated for the travel, the member can only book travel to the amount allocated by the budget. If the cost of the travel will exceed the allocated budget either:
 - a. The member is required to agree to compensate the Association for the amount over and allocated travel budget or
 - b. Apply to the Finance Committee for approval to exceed the travel budget.
3. All members are advised to check with the Executive Director or Treasurer as to the amount remaining in the allocated budget before booking any travel. As stated in 2 a. above, if a member exceeds their annual travel budget they will be required to refund the excess within
4. Applications for approval to exceed a travel budget is to be for exceptional circumstances only and would not normally be approved for planned travel.

Class of Travel and Accommodation

5. IAATI will only pay for economy air/train/sea fares. If a member requests or books a higher grade fare they will be required to reimburse the Association the difference between the economy fare and the upgraded fare. When submitting their expense they should include both the receipt that they paid as well as a quote, obtained from the same company on the same day as the booking, for the economy fare.
6. When booking accommodation members are entitled to stay at the hotel where the meeting or training is being held but should book the most economical room available (generally a standard quality room). Where there is no accommodation at the meeting/training venue they should book the most economical room available at a suitable mid-priced hotel.

Travel Combining Business and Pleasure

7. Members may travel with family members or extend their time away, however they will only be reimbursed for the member's personal fares, accommodation and travel insurance, etc. and not those of their travelling companions. If they extend their travel plans the Association will only reimburse the member for the most direct fares to and from the meeting/seminar. Clear evidence of the cost for a direct fare for the member only must be provided to ensure transparency. This includes a quote from the same company obtained on the same day of the travel for the cost of a single person travelling direct to the meeting/training and directly home.
8. In addition, IAATI will only cover the member's accommodation costs for a maximum of one night before and after the meeting/event where this is necessary because of the scheduled commencement or finishing time of the event; and flight schedules. Where a member is required to spend 12 or more hours travelling they will be entitled to claim one additional night's accommodation prior to the event to recover from jet lag.

Travel Insurance

9. All travel must be covered by travel insurance, the cost of which will be reimbursed by the Association. If a member books travel without travel insurance then they are required to reimburse IAATI all travel costs if they are unable to travel. Similarly they will not be entitled to claim for any additional expenses if they have commenced their travel and their plans change because of an event that would normally be covered by travel insurance.
10. If the member is travelling with a family member and takes out family cover travel insurance, and/or extend their travel for personal reasons, the amount of travel insurance reimbursed by the Association would be the insurance price had the member been travelling alone and did not extend their time away. In this case the member should submit two quotes for travel insurance. One based on travelling

alone and with no extension to their travel and a second with the price for travel covering any travelling companions and/or any extension to their travel.

11. Travel costs include the following any of the following:
- Return air, bus, train, sea travel in order to get to from the members place of resident and the meeting.
 - Accommodation costs
 - Meeting or seminar registration costs etc.
 - Taxi fares
 - Hire car (if essential)
 - Petrol, road tolls, parking expenses (for members personal vehicle or hire car)
 - Visa costs (if applicable)
 - Meals while away
 - Travel insurance
 - Laundry and dry cleaning when travel is longer than four consecutive nights
 - Overweight and/or over-limit baggage is allowed if the over limit is due to Association equipment/material required for business
 - Excess applied to any insurance claim from their travel insurance
12. The following travel costs and out of pocket expenses are not reimbursed by IAATI:
- Passport fees
 - Any travel power adapters you are required to purchase
 - Any sightseeing expenses while away
 - Alcohol
 - Movies (in-room and in-flight movies)
 - Newspapers or magazines
 - Costs for personal guests
 - Parking or traffic tickets
 - Cost of business clothing

Submission and processing of expenses

13. All approved travel expenses will only be reimbursed after the submission of the appropriate receipts to the Treasurer. Where a member is travelling with a family member and/or extending their travel for personal reasons they must submit the cost of the fares/accommodation/ travel insurance etc. they paid, plus a quote from the same companies based on the most direct routes to and from the meeting/seminar. In relation to air/train/sea fares, these quotes must be dated within 24 hours of the date the fares were purchased, so a true comparison of the costs that IAATI would have incurred can be made.
14. All receipts should be submitted with 60 days of returning. If there is an outstanding travel insurance claim then, those receipts that the member does have should be submitted within 60 days of returning and the remaining receipts should be submitted as soon as they are available.

15. Any amount owed to the Association, for example any amount for an upgrade class of seat or for a travel costs that were not used and the member did not take out any travel insurance, are to be repaid to the Association within 30 days of their return or planned return date.
16. IAATI will cover any excess fee charged for an insurance claim relating to the member from their IAATI paid travel insurance policy.
17. The Member agrees to reimburse IAATI, within 30 days of receipt of any monies paid by their travel insurer to them for expenses that the Association has paid for.
18. Other than matters involving a travel insurance claim, any travel or out-of-pocket expenses submitted more than 60 days after the end of the travel are not considered reimbursable.
19. The Finance Committee is responsible for the approval of all out of pocket and travel expenses. The Finance Committee will review all expense submissions and refund the member all approved expenses within 30 days of receipt of the member's expense report.
20. When you wish to claim expenses there is a Microsoft Excel template that you must complete and send to the Treasurer and Executive Director. The template specifies the per diem allowance that IAATI pays including a breakdown for breakfast, lunch, dinner and incidentals. You cannot claim more than the per diem allowance, The per diem allowance is reduced to 75% on the first and last day of travel.
21. By submitting this expense form you certify that:
 - a. The amounts claims are a true and accurate record of the costs you have incurred, and you have only claimed for items you are entitled to as approved by the IAATI Travel Policy.
 - b. It excludes any costs for personal extensions to any official travel.
 - c. It excludes the costs associated with any family members or friends travelling with you.
22. If the travel policy has not been adhered to, you will be liable to repay any funding provided.
23. A copy of the spreadsheet can be downloaded from:
<https://www.iaati.org/about/documentation/category/constitution--policies-and-procedures>

Member's Responsibilities

24. It is a Member's responsibility to:
 - Book as early as possible in order to secure the lowest prices.
 - Check the itinerary to ensure the booking is correctly made.
 - Allow appropriate time to transfer to and from the airport to catch a flight and attend meetings.

- Obtain and submit all necessary receipts and documentation.
- Submit within the time frames specified the reconciliation of their expense report and providing full documentation as verification of each expense.
- Reimburse any funds (if applicable) within the specified time frames.

Breaches of the Policy

25. Recipients of any IAATI funded travel are reminded that they should respect that they are travelling on behalf of the Association and represent IAATI. They should be professional at all times as their actions are being noticed by fellow members, sponsors, and other potential members and business partners. They should not be excessive in their travel claims as this limits the funds available to provide more services to the members.
26. Conduct which violates this policy is considered a breach of the Association's Code of Ethics and a complaint may be lodged with the Ethic Committee. Individuals who breach this policy are subject to appropriate disciplinary action by the Association, but not limited to one or more of the following:
- Removal from the position on the Board
 - Suspension or termination of their membership;
27. In some circumstances, the Association may also report the person's conduct to external authorities such as their employer, the relevant Taxation Authority and/or Police Department.

Notes:

Passports and Visas

Members traveling internationally should check that their passport is current with at least six month validity and three blank visa pages. The Association will not be liable to any costs associated with obtaining or renewing your personal passport.

Members should ensure they have any necessary visas (if required) and the correct type of visas well in advance of the scheduled departure date. Members should not rely on non-government websites for visa and passport information. Expenses associated with obtaining visas may be reimbursed by the Association.

Combining Business and Personal Travel

Recognizing that members are volunteers and travelling in their own time the Association allows members to add a personal leg to a business itinerary, and/or to travel with one or more family members provided:

- they clearly distinguish between the Association's and personal experiences, and
- only claim for those costs that related to themselves and IAATI business.

Substitutions

The Board does not support a substitution or exchange philosophy with regard to travel expenditures. If a member chooses a less expensive option, it would not be appropriate to utilize this "cost savings" somewhere else, particularly if it is personal in nature. All IAATI expenses must have a substantiated purpose and not present any optics issue which could be viewed in a negative way. Example: If you choose to stay at a friend's house while traveling on behalf of the Association, thus saving the IAATI lodging costs, you may not reallocate this cost savings to cover your meals while staying extra days for personal reasons, or to thank your host.

Parking and Driving

The cost of parking whilst on business related travel is reimbursable. Valet parking is considered a personal expense and will not be reimbursed. The exception is where there is no alternative parking offered.

Driving and parking infringement penalties are not reimbursable.

Taxis

The use of chauffeured luxury vehicles should be avoided. In instances where this type of transport is **used**, additional justification must be provided to show why it was necessary and represented value for money to the Association.

Alcohol

Alcohol is not an allowable expense under this policy. Any consumption of alcohol during a meal, whilst providing hospitality or from a hotel mini-bar should be invoiced separately or itemized and paid as a personal expense.

Members are reminded that while on IAATI business they are representing the Association and as such the consumption of alcohol should be at responsible levels.