

# **HFCC-ADJUNCT FACULTY ORGANIZATION**

## **TRAVEL AND BUSINESS ENTERTAINMENT**

### **Travel Advances**

The AFO will normally not issue advance travel payments. Officers and other individuals who are required to travel on AFO business are eligible for reimbursement of their travel expenses within the limits of this travel policy. In the event of extraordinary circumstances, the Executive Board can approve a travel advance up to the amount of the expected cost of travel.

### **Employee and Officer Business Travel**

At the conclusion of an AFO business trip, an employee or member who has incurred business-related expenses should complete an Expense Report in accordance with the following policies:

1. Identify each separately incurred business expense (i.e. do not group all expenses associated with one trip together).
2. With the exception of tips and reimbursed mileage, all business expenses must be supported with invoices/receipts.
3. For all lodging and any expenditure other than meals, vendor receipts/invoices must be submitted. Credit card charge slips do not represent adequate supporting documentation.
4. For airfare, airline-issued receipts should be obtained. If a traveler fails to obtain a receipt, other evidence must be submitted indicating that a trip was taken and the amount paid (for example, a combination of an itinerary, a credit card receipt, and boarding passes).
5. Mileage may be reimbursed at the standard federal rates currently in effect, as published each year by the IRS.
6. The business purpose of each trip must be adequately explained on each report.
7. Expense codes must be identified for all expenditures.
8. For all meals and other business entertainment, the following must be clearly identified:
  - a. Date of the event, name of the establishment, name of member or employee paying for the meal, names of other(s) in the party, titles of all in attendance, unions, and business relationships of all persons entertained
  - b. The business purpose of the entertainment (topics discussed, etc.)
9. All expense reports must be signed and dated by the employee or member.
10. All expense reports must be approved by the President or the Treasurer.
11. Only one expense report form should be prepared for each trip.

An employee or member will not be reimbursed for expense reports not meeting the preceding criteria. If the Expense Report results in a balance due to the AFO (as a result of receiving a travel advance greater than actual business expenditures), the employee or member must write a check to the AFO. No further travel advances will be issued to any employee or member who has an outstanding balance due to the AFO from any previous business trip.

### **Reasonableness of Travel and Entertainment Costs**

The AFO shall reimburse travelers only for those business-related costs that are reasonably incurred. Accordingly, the following guidelines shall apply:

1. Suites and other upgraded rooms at hotels shall not be allowed; Travelers should stay in standard rooms.
2. When utilizing rental cars, travelers should rent midsize or smaller vehicles and share rental cars whenever possible
3. Whenever possible, travelers should utilize personal cell phones when placing calls while away on travel; the hotel's long-distance service is not reimbursable under this policy.
4. No personal entertainment expenses incurred while travelling on AFO business shall be reimbursed.
5. Reasonable tips for baggage handling shall be reimbursed; No receipts are required.
6. The cost of alcoholic beverages is generally not an allowable expense. Exceptions may be made by the Executive Board in the event the President or a member incurs such expenses in the course of entertaining a non-AFO member.
7. The maximum per diem meal allowance is determined by Internal Revenue Service per diem meal allowance guidelines. In 2009, the per diem amount was \$39, but higher rates applied in certain high-cost areas as designated by the government. The per diem amount shall be reduced for employees or members attending conventions, conferences, and so forth if meals are included: \$5.00 per diem if breakfast is included; \$10 per diem if lunch is included; and \$24 per diem if dinner is included. The reduction will be a higher amount if the travel is to a high-cost area.

### **Credit Card Policy**

Employees and members of the AFO shall not be issued company credit cards. Personal credit cards should be used or other arrangements should be made to cover travel and entertainment expenses.

### **Special Rules Pertaining to Air Travel**

The following additional rules apply to air travel:

1. Air travel should be at coach class; First class air travel shall not be reimbursed.
2. Memberships in airline flight clubs is not reimbursable.
3. Cost of flight insurance is not reimbursable
4. When returning on a Sunday or departing on a Saturday in order to obtain a cost savings in airfare due to the Saturday-night stay over, travelers should note a total cost comparison (showing that the lower airfare plus an extra night's lodging is less costly than airfare without the Saturday night stay over).
5. Cost of upgrade certificates is not reimbursable
6. Cost of canceling and rebooking flights is not reimbursable, unless it can be shown that it was necessary or required for legitimate business reasons (such as changed meeting dates, etc.)
7. Travelers must identify and pay for all personal flights, even if such flights are incorporated into a flight schedule that serves business purposes (i.e. the AFO will not reimburse for the personal legs of a trip).
8. Clarification of en route stop over policy - to the extent the total cost of the stop over trip and continuation flight does not exceed the total cost of the flight from the original destination to the final destination, the stop over will be permitted. The cost justification, (burden of proof) will be maintained by the traveling employee/member.
9. When traveling to said meetings, conventions and conferences a one-day prior to registration arrival time may be permitted to have adequate time to prepare for the meetings as well as adjust for any time zone changes. This policy will be reviewed by the President and Treasurer to ensure that there is no abuse.

### **Spouse/Partner Travel**

It is the policy of the AFO not to reimburse any employee or member for separate travel costs (air fare, etc.) associated with his/her spouse or partner. The cost of a shared hotel room need not be allocated between employee/member and spouse/partner for purposes of this policy.

### **Des Minims Rules Defined**

The AFO recognizes that there may be incidental "des minims" cost incurred that have a personal nature to them but are impractical to identify and report. The policy is to attempt to identify all personal charges and reimburse the AFO, or disallow those costs. The following are items that the Union considers within the "des minims" guidelines:

1. Business Meals – The President is authorized to incur expenses in connection with business meals and entertainment that include the spouse, or significant other, of the business associate. The spousal portion of the dinner for the President will likewise be paid by the AFO.
2. Meals & Entertainment - There may be an occasion when it will be difficult to determine if an invited guest has a direct or indirect business relationship with the AFO. To the extent that personal charges can be readily identified they should be reimbursed. However, because it may not be practical to determine these costs they will be considered allowable under the "des minims" concept.