



Volunteer and Staff Travel & Expense Policy

Policy Number: 0001

Responsible Office: Enterprise Governance & Corporate Services and OCFO

Responsible Official: Susan Herrington & Catherine Mickle

Effective Date: March 2016

I. Scope and Policy Statement

This document provides guidelines and establishes policy for individual business (transient) and meeting-related travel for the American Cancer Society and the American Cancer Society Cancer Action Network (ACS CAN). This policy applies to volunteers and staff of the Society and ACS CAN. It also applies to vendors, consultants, and contractors traveling on behalf of the Society who are seeking reimbursement for business and meeting-related travel expenses.

II. Reason for the Policy

These guidelines and policies have been developed to provide a consistent, fair, and compliant approach to the way business travel is conducted and reimbursed; to improve the quality of services provided; to control and minimize travel costs; and to ensure the safety and security of the traveling individual. It is the professional responsibility of each traveler to read and comply with this policy in its entirety, except where extenuating circumstances make adherence impossible.

III. Definitions

Meeting – defined as a meeting of 10 or more travelers.

Individual Business Travel (Transient Travel) – Individual business travel booked via the Society's online travel booking tool when staff are traveling individually and not part of a group that requires a meeting registration site.

Meeting Related Travel – Travel booked via the travel link attached to a meeting registration website when 10 or more travelers are gathering for a Society meeting.

IV. Policy Details

A. Expense Reimbursement Provisions

In order to receive reimbursement for any expense (including travel), itemized receipts for each eligible expense greater than \$25 must be submitted within 90 days from the date of the transaction. (If an itemized receipt is lost for amounts between \$25 and \$75, submit an approved Lost/Missing Receipt Form. For amounts of \$75 and more, the original itemized receipt is required, due to IRS substantiation requirements.) Note: documentation for amounts of less than \$25 should be maintained for audit evidence.

B. Traveler Responsibility

All Society and ACS CAN travelers share the responsibility of managing travel expenses. Every effort has been made to address a wide range of circumstances; however, no set of policies and procedures can cover all events and contingencies. Ultimately, the faithful execution of the intent of these policies depends on the sense of responsibilities, stewardship, and personal integrity of the travelers and their management to ensure the appropriate and economical use of donor funds and the accurate, timely accounting of expenses.

C. Official Travel Management Company

All business and meeting travel-related needs of the Society and ACS CAN are managed by a comprehensive and consolidated Travel Management Program. BCD Travel is the current official designated travel management company (referred to as the “TMC”).

Benefits of a consolidated travel management program:

- To maximize our ability to negotiate discounted rates with preferred suppliers by the consolidation of purchasing power. This may only be achieved when volunteers, staff, and others traveling on the organization’s behalf arrange business travel needs through the designated travel tools and the TMC.
- To ensure all travelers have a safe and productive experience, while reducing the risk and liability to the organization. This allows the Society and ACS CAN the ability to locate all travelers during an emergency and provide immediate assistance as required.
- To provide cost controls and monitor policy adherence
- To provide industry expertise and state-of-the-art technology to travelers

Volunteers, staff, and other individuals traveling on behalf of the Society or ACS CAN must seek prior approval from Finance and/or Travel Management for all expenditures and circumstances that are not covered in this document.

D. Compliance

Travel Management, Finance, and the official TMC are authorized to monitor policy compliance. Department heads will receive monthly noncompliance reports from the Travel Management team.

Travel expenses that do not comply with this policy may be subject to:

- Escalated management review
- Delay of reimbursement
- Non-reimbursement

Note: *Volunteers and other non-staff traveling on behalf of the Society or ACS CAN for individual business (transient) travel should contact the appropriate staff partner for reservations. Reservations must be made by staff designated as the Guest Travel Arranger via the online travel booking tool. If reservations cannot be made*

via the online booking tool by the staff partner, staff must notify the TMC prior to a volunteer or other non-staff contacting the TMC to secure a travel reservation. Reference the “Travel Booking” section of the Volunteer & Staff Travel & Expense Policy Frequently Asked Questions for instructions on how to submit travel notification for non-employees. Note: The “Guest Traveler” feature should not be used to make air, car, and/or hotel reservations for staff.

E. Business Travel Accident Insurance

The Society and ACS CAN provide business travel accident insurance for staff and eligible volunteers while traveling on official business for accidental death and other covered losses. To determine eligibility and coverage amount, review the [business travel accident policy](#) located on Society Source or obtain a copy from your staff partner. **Note:** Additional coverage is provided by the JP Morgan Travel Ghost Cards when booking through the Society’s online travel booking tool, Concur. Reference the “Travel Insurance” section of the Volunteer & Staff Travel & Expense Policy Frequently Asked Questions for additional information regarding the JP Morgan insurance coverage.

F. Travel Booking (Air, Rail, Lodging, Car)

- All travel (including air, rail, hotel, and car rental) must be booked through the designated TMC, using the online travel booking tool.
 - **Exceptions:** Travel agents are available for complex bookings with more than five (5) stops, changes, and international travel.
- Occasionally, exceptions to the following policies will be required. When prompted by the online travel booking tool, the traveler must provide an acceptable reason for the exception at the time of booking travel. All exceptions will be reported to Travel Management staff and to the appropriate department management.
- All airline and rail tickets must be paid by the Society or ACS CAN with the designated company JP Morgan travel ghost card on file. Travelers may not pay for business air and/or rail travel with a Society issued P-Card nor personal forms of payment. Reimbursement may not be received for air and rail expenses via the T&E system.
- All travelers are required to create and retain a traveler profile in the online travel booking tool. All information must be maintained as current by the traveler.

Airlines

- Travelers must book within \$75 of the lowest logical fare with the following exceptions:
 - There is no more than one interim stop each way.
 - The total additional travel time is not to exceed two hours each way.
 - Departure and/or arrival time is no more than two hours before or after requested time each way.
 - Where more than one airport is available, the traveler must consider fare differences as well as location to office or residence.
- A traveler may not decline a fare in a lower class of service in order to upgrade.

- Travelers are encouraged to book domestic travel at least 14 days prior to travel.
- Personal, private aircraft for business purposes is prohibited.
- Strictly personal airline travel may not be booked through the Society or ACS CAN resources. Business travel that includes personal segments must be booked by the TMC, and the traveler must purchase the personal segments with a personal credit card at the point of sale. The TMC will apply the business amount to the applicable ACS credit card.
 - *Note: Trip cancellations that include personal travel, either voluntary or involuntary, will not be refunded by the Society.*
- Using the Society's TMC for spousal travel is not allowed.
- The TMC provides [Flight Insurance](#) up to \$200,000 to each ticket holder for accidental death and dismemberment and for paralysis while traveling on a common airline carrier for which the ticket was issued. Subject to eligibility requirements and policy exclusions, this coverage is afforded to all customers nationwide (exceptions may apply). Any changes to the original ticket made outside the TMC may impact this coverage. *Note: Volunteers should contact their staff partner for more detail.*
- Changes and cancellations to airline reservations are permissible only if the change/cancellation is made for business reasons.
 - Changes that incur additional charges totaling more than \$400, including the applicable change fee, require prior written approval from the traveler's supervisor (for staff) or the appropriate staff partner (for volunteers). (The traveler is responsible for obtaining the supervisor's approval. The manager must submit approvals to the TMC via helpme.cancer.org using the iTravel Request Form.) *Note: Managers will not have the ability to approve changes over \$400 made via the TMC's after-hours emergency service. Reference the "Travel Booking" section of the Volunteer & Staff Travel & Expense Frequently Asked Questions.*
 - En route changes due to flight disruptions are the responsibility of the disrupting airline. Travelers should contact the TMC for assistance in rebooking or rebook via the applicable airline at no expense to the traveler. The travel management fee in this instance will be waived. Changes due to flight disruptions do not require supervisor approval.
 - When en route changes are deemed necessary but not related to airline-caused disruptions, the traveler must call the official TMC to request. The only *exception* is for same-day confirmations.
 - In the event that an airline ticket is canceled or changed, it is the traveler's responsibility to communicate to the official TMC *prior* to the departure date and time of the original flight. The official TMC will work with the traveler to ensure nonrefundable tickets are applied to future travel.

International Travel

The Society is committed to the safety and well-being of its volunteers and staff who travel abroad and is committed to balance the value of international travel against potential risk.

International SOS is the Society's medical and security assistance company. Volunteers and staff must

print the SOS membership card and carry it with them on all international trips. *(Note: The staff partner must provide volunteers a copy of the SOS membership card. Reference the “International Travel” section of the Volunteer & Staff Travel & Expense Policy Frequently Asked Questions to print the membership card. A mobile app is also available free of charge).*

Volunteers and staff must contact International SOS for both emergency and non-emergency situations when traveling internationally. Volunteers and staff should contact International SOS for guidance if they are already in a country when a US Department of State travel warning has been issued. *(Note: Reference the “International Travel” section of the Volunteer & Staff Travel & Expense Policy Frequently Asked Questions for details on how to engage International SOS.)*

The Society prohibits travel to an international destination when the Homeland Security Advisory System (HSAS) or US Department of State has issued an imminent threat alert for that location. Travelers are responsible for checking HSAS terrorism alerts prior to booking an international reservation. Questions regarding travel should be directed to the Nationwide Travel Team via helpme.cancer.org using the iTravel Request Form.

- All volunteer and staff international travel that originates inside the United States must be booked through the TMC.

Important Note: All current passport, nationality, and visa information must be maintained in the traveler profiles. Failure to maintain current information may prohibit international travel on behalf of the Society.

- Airline purchases for international travel should book the lowest logical airfare for the most direct route.
 - **Exception:** If the duration of an international trip is more than 10 consecutive hours of flight time (excluding layovers), the traveler may purchase a logical, upgradable fare, an economy comfort, or a comparable economy comfort class of service with supervisory approval. The traveler may use personal frequent flyer miles or coupons to upgrade to business or first class. The traveler must pay all fees associated to the upgrade.
 - **Exception:** If there are extenuating circumstances related to the health of the traveler or other instances, consideration may be given for the purchase of a business-class ticket.
- Exceptions require advance approval by department head and/or CFO.

Note: Reference the “Travel Booking” section of the Volunteer & Staff Travel & Expense Policy Frequently Asked Questions for economy comfort class description.

- Volunteers and staff must activate international mobile service to personal mobile device plans and provide the TMC with their international mobile information prior to each international trip. Prior to traveling, staff must check with their personal mobile provider to verify coverage. If the carrier does not provide coverage, a loaner phone must be provided. (Reference the “Travel Booking” section of the Volunteer & Staff Travel & Expense Policy Frequently Asked Questions for loaner phone options for international travel.) *Note: For more detail regarding reimbursement*

and coverage, reference the Society's Mobile Policy.

- Non-staff, international travelers originating outside of the US, and traveling on behalf of the Society or ACS CAN, may purchase airline tickets from an in-country supplier (travel agency, airline, or consolidator). The following requirements apply:
 - Advance consultation and approval with the nationwide travel management team and the sponsoring department are required to determine the maximum reimbursable amount.
 - The price of the airline ticket is less than \$300 than a ticket purchased in the US.

AIR	
Reimbursable	Non-reimbursable
Checked luggage, up to two (2) bags/shipment of bags when less expensive than airline fees for same number of bags (two-bag limit)	Shipping of luggage when cost exceeds airline baggage fees for same number of bags (two-bag limit)
Luggage overweight fees, if for business purposes	Seat assignment fees (Exceptions may apply in certain instances)
Passports and visas required for international travel	Airline memberships (Delta Sky Club, etc.)
International private car service with advance approval from travel management and CFO	Airline tickets purchased outside the official TMC
Immunizations required for international travel	Headphones, movies, etc.
Internet access on airplane for flights more than two hours (copy of the travel itinerary is required)	Upgrade fees, except as allowed in this section for international travel
Cost of temporary international mobile service when traveling outside the US	

Lodging

All individual hotel reservations must be booked through the official TMC using the online travel booking tool. (Exception: Certain geographical areas do not have adequate coverage from hotels that participate in the global distribution system [GDS] of the official TMC, making it impossible to book them on the online system. In these instances, reference the “Lodging” section of the Volunteer & Staff Travel & Expense Policy Frequently Asked Questions on the process to add a hotel to the online travel booking tool.

Nationwide Preferred Hotel Suppliers:

Preferred suppliers are located in the iTravel section of the Meetings and Travel Management community on Society Source.

- Preferred hotels must be used for individual business lodging (see specifics below for selected hotels for meetings) except in the following situations:
 - Traveler is able to secure a non-preferred hotel for at least \$20 less per night over the available preferred hotel through the official TMC.
 - If a property within the preferred hotel chain is unavailable, the traveler should book a comparable hotel with comparable rates.
 - If no preferred hotels are within a manageable distance to the traveler’s business location, the traveler may book an appropriate hotel and indicate the reason for noncompliance.
 - Total cost of staying in a non-preferred hotel is no more than \$20 per night than a preferred hotel due to a reduction in travel costs (e.g., do not have to rent a car or use taxis to stay in a non-preferred hotel).
- When attending a non-Society or non-ACS CAN conference, it is acceptable for travelers to book lodging as instructed by the conference guidelines of the sponsoring organization. However, it is encouraged to consider less expensive hotel options when available. **Note:** Reference the “Lodging” section of the Volunteer & Staff Travel & Expense Policy Frequently Asked Questions for instructions on how to submit a copy of the hotel confirmation to the Society’s TMC.
- When making a lodging reservation outside the preferred suppliers, travelers must indicate the reason by selecting the appropriate reason code in the online travel booking tool.
- If a nonsmoking room is not available at a preferred property, a guest room may be booked at a non-preferred property at a comparable rate not to exceed an additional \$20 per night.
- The preferred chains are signified as preferred suppliers by three gray diamonds, and preferred properties with property-specific negotiated rates are indicated by three yellow diamonds in the online travel booking tool.

LODGING	
Reimbursable	Non-reimbursable
Room and tax (preferred vendors)	Upgraded guest rooms
Self-parking; valet parking if self-parking is not available	Valet parking if self-parking is available
Fitness center, not to exceed \$20/day	Mini bar
Room service using prudence and good judgement (excluding alcohol)	Sundries
Business center expenses for Society- or ACS CAN-related business	Newspaper delivery
Laundry and dry cleaning for travel exceeding five (5) business days	Barbershop, shoe shine, massage, etc.
In-room Internet if not complimentary	In-room movies
	Hotel no-show charges due to the lack of cancellation by traveler
	Prepaid hotel charges
	Rental Properties (i.e. homes or condominiums)

Ground Transportation

- Transportation expenses incurred when using a personal automobile for business travel, beyond a normal daily round-trip commute from the individual’s home to their designated office, are reimbursable. (For instance, if the daily round-trip commute is 40 miles and business travel requires 60 miles of travel, then 20 miles is reimbursable as a business expense.) Mileage reimbursement for staff is at the current IRS-published rate for business travel, and for volunteers, it is at the published volunteer rate. All travelers should use a shuttle bus, airport shuttle bus, taxi, rental car, or personal car based on the lowest-cost option available that is safe and logical and that meets travel time needs. *Note: Reference the “Car Calculator” located in the iTravel section in the Meetings and Travel Management tab on Society Source to determine the most cost efficient mode of automobile travel (renting vs driving personal vehicle).*
- When using a personal automobile for business travel on behalf of the Society, the traveler's personal automobile insurance policy will be considered primary. The Society’s automobile insurance policy will be secondary and will only provide coverage once the traveler's personal coverage is exhausted. The Society does not provide reimbursement for collision or physical damage deductibles

under a traveler's personal automobile insurance policy. In other words, any applicable deductibles are the responsibility of the traveler.

- Travelers should always consider carpooling (whether using a personal or rental vehicle) as a low-cost option.

Rental Cars

All vehicle rentals including cars, mini vans, cargo vans, and box trucks, used for ACS events, must be booked with a preferred supplier that includes appropriate insurance that reduces the Society's liability in the event of damage to the vehicle.

All cars and mini vans must be booked using the online travel booking tool.

Box trucks, cargo vans, and 12-14 passenger vans must be booked using the appropriate booking form.

Note: Reference the "Rental Car" section of the *Volunteer & Staff Travel & Expense Policy Frequently Asked Questions* for instructions on how to request box trucks and cargo vans.

Nationwide Preferred Car Suppliers

Preferred suppliers are located in the iTravel section of the Meetings and Travel Management community on Society Source.

- For business travel located away from the traveler's customary office, rental cars should be used for automobile trips when the total cost of the car rental is less than the mileage reimbursement of personal automobile use. Staff should determine the most cost-efficient method of automobile travel using the calculator provided within iTravel, which considers variables such as mileage rates, cost of gas, rental fees, applicable delivery charges, number of days rented, expected mileage, etc.
- Travelers must book rental cars with the Nationwide Preferred Rental Car Suppliers via the online travel booking tool.
- Liability insurance covering bodily injury and property damage are included in the Society's national rental car agreements. These agreements do not provide coverage for personal injury protection, medical payments, uninsured/underinsured motorist, or no fault coverage, except where and to the extent required by state law. Collision insurance is also included under the Society's nationwide car rental agreements, which applies to theft and damage to rented autos. Travelers should decline any duplicative insurance at the time of rental. *Note: If in doubt about insurance coverage, travelers should check with the nationwide travel management team prior to renting the vehicle.*
- Travelers are authorized to book up to an intermediate-class vehicle. If three or more passengers are to be accommodated, a larger vehicle may be booked.

- Travelers should not prepay gas refueling charges at the time of rental unless deemed cost-effective. Rental cars should be returned with the required level of gas to minimize the cost of refueling.

GROUND TRANSPORTATION AND RENTAL CARS	
Reimbursable	Non-reimbursable
Car rental with preferred suppliers	Car upgrades
Mileage at current IRS rate, not to exceed lowest logical airfare, excluding the amount of a daily round-trip to the traveler's primary office	Membership in priority programs
Tolls and ferries	Traffic violations and parking tickets
Private car service, provided airport parking and mileage to/from the airport exceeds the cost of the car service (Documentation must be provided.)	Limousine
Gratuities per Volunteer & Staff Travel and Expense Policy	Car rentals with non-preferred suppliers
Airport parking at the lowest available rate (assuming a safe environment)	Satellite radio
Rental of navigation systems with explanation of need (Preference is to not use if alternative mapping is available, such as smartphone apps)	Mileage to and from primary office location
Train tickets not to exceed lowest available airfare	Prepayment of the rental car company's roadside assistance
Rental car company's roadside assistance in the event of an incident	

G. Meals

Travelers are to use judgment and stewardship when purchasing meals during business travel.

- Alcoholic beverages are considered a non-reimbursable expense. (**Note:** Refer to the ACS Meetings Policy for acceptable alcohol circumstances.)
- Meal gratuities exceeding 20 percent of the total food and beverage costs will not be reimbursed. (**Note:** See the Customary Gratuity Chart in the Volunteer & Staff Travel & Expense Policy Frequently Asked Questions.)
- The bill for multiple staff dining together should be paid by the most senior-level staff present at the meal.
- A detailed/itemized receipt for all meals must be submitted for reimbursement.

Exception: When an itemized receipt is not available, as in the case of a hotel folio.

Note: *If a detailed receipt is not available or not provided, it must be noted on the receipt.*

Reimbursable meal expenses fall into three categories – travel, business, or de minimis fringe benefit.

- Travel – For a meal to be considered as travel expense, the meal must occur when away from home overnight in pursuit of business.
- Business – For a meal to be considered business related, it must be planned with a specific agenda and defined business objectives and organized for the convenience of the employer. The main purpose of the meeting is the active conduct of business with more than a general expectation of getting income or some other specific business purpose. Business must be discussed during the meal period, and must take place in a clear business setting.
- De minimis fringe benefit – On occasion, it is acceptable to reimburse modest meals to employees who are alone as a nontaxable de minimis fringe benefit. To qualify, it must be reasonable and satisfy the following three conditions:
 - The meal expense occurs only on an occasional basis.
 - The meal expense is incurred because work necessitates an extension of the employee’s normal work schedule.
 - The meal expense enables the employee to work beyond the normal work schedule.

Note: *Reference the “Meal” section of the Volunteer & Staff Travel & Expense Policy Frequently Asked Questions for the Customary Gratuity Chart.*

H. Meeting-related Travel (Meeting is defined as 10 or more travelers.)

When traveling to meetings sponsored by the Society or ACS CAN, volunteers and staff must follow the policy as outlined above for meeting-related travel. The meeting participant/traveler must make necessary air and/or rail travel arrangements online as instructed by the meeting registration site.

Air Travel to Meetings

All travelers must book the lowest logical airfare to the meeting via the travel link attached to a meeting registration website. Special negotiated meeting fares may apply with certain carriers. Details of these special fares will be communicated as part of the meeting notice.

Lodging for Meetings

The Meetings and Travel Management registration staff member is responsible for hotel arrangements for all meetings sponsored by the Society or ACS CAN. A group rate is negotiated for all meetings.

- Meeting participants must follow the instructions via the online registration website to secure a guest room for a meeting and must stay at the designated hotel.

- The names of volunteers, staff, and other participants whose room and tax charges are to be paid by the Society or ACS CAN must be submitted to the hotel on a rooming list. For these types of meetings, room and tax only will be billed to the Society or ACS CAN. Attendees are responsible for incidental charges upon checkout.

Ground Transportation to Meetings

A traveler is required to use the most logical, economical mode of ground transportation to and from the airport for all Society or ACS CAN sponsored meetings.

- The specific type of ground transportation will vary depending on the destination.
- The meeting invitation or registration website will include ground transportation information.

Meals Provided at Society or ACS CAN Meetings

Meals incorporated into the program of a meeting sponsored by the Society or ACS CAN is an expense of the organizations.

- Meals provided for participants as part of a meeting program reflect a food and beverage expense for that participant and are charged to the Society or ACS CAN.
- Meeting participants may not eat elsewhere and receive reimbursement for such expenses that are provided as part of the meeting program.

Example: If a meeting program provides each participant with breakfast and lunch, the only reimbursable meal expense would be dinner, if appropriate.

Personal Expenses

- Other non-reimbursable expenses include, but are not limited to, the following:
 - Babysitting charges
 - Gum, newspapers, magazines
 - Snacks – including coffee and drinks unless replaced as a meal (i.e., breakfast/lunch)
 - Charitable contributions, including reimbursement for Society events
 - Clothing or toiletries – due to lost luggage or other emergency situation
 - Clothing for special functions – such as tuxedo rental or costumes
 - College/university alumni dues
 - Credit card fees – including reward annual fees, late charges, and interest
 - House-sitting – regardless of circumstances (e.g., accompanying spouse)
 - Jury duty expenses
 - Personal gifts – including staff or volunteer gifts for birthdays, weddings, and other nonbusiness occasions
 - Pet-sitting/boarding charges
 - Political contributions

If you are in doubt about the validity of a particular expenditure, check with your supervisor or the

Finance department before incurring the expense. *Note: Volunteers should consult with their staff partner.*

V. Related Links

[Business Travel Accident Policy](#)

[Nationwide Flight Insurance](#)

[Volunteer and Staff Travel & Expense Policy Frequently Asked Questions](#)

VI. Revision History

Date:	Revised By:	Comment:
02.22.16	Denise House, Enterprise Governance & Corp Svcs	Policy Format: The Volunteer and Staff Travel & Expense Policy has been re- formatted into the policy template to align with the Operational Policy and Development Guidelines.
02.22.16	Denise House, Enterprise Governance & Corp Svcs	BCD Travel Emergency After-hours Policy (Air & Rail travel): BCD will no longer contact Managers for changes over \$400 made via the Emergency After-hours service. Changes will automatically be charged to the Society’s ghost card without approval. This process was implemented to decrease hold times and improve accessibility to travelers who are calling due to a travel emergency. Note: This applies only to changes made outside of the TMC’s normal operating hours 8am – 6pm eastern.
02.22.16	Denise House, Enterprise Governance & Corp Svcs	Rental Car Calculator: In a continued effort to reduce the cost, the rental car calculator has been updated to assist staff when choosing the lowest cost option for driving a personal automobile vs. renting a car when traveling for Society business. It is strongly recommended that staff use the car calculator when making choices to driving a personal vehicle vs renting a car. Note: The car calculator can be found in the iTravel section in the Meetings and Travel Management tab on Society Source
03.02.16	Denise House, Enterprise Governance & Corp Svcs	Rental Properties – (i.e. homes or condominiums): are not permitted and are non-reimbursable for the use of Society meetings.

