



# Volunteer and Staff Travel and Expense Policy

**Policy Number:** POL118

**Responsible Office:** Enterprise  
Governance & Corporate Services and  
OCFO

**Responsible Official:** Susan Herrington & Catherine Mickle

**Effective Date:** 08.04.2017

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## I. Scope and Policy Statement

This document provides guidelines and establishes policy for individual business and meeting related travel for the American Cancer Society, Inc. and American Cancer Society Puerto Rico, Inc. (collectively the "Society") and the American Cancer Society Cancer Action Network ("ACS CAN") staff and volunteers. 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.

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## II. Policy Details

### *A. Expense Reimbursement Provisions*

In order to receive reimbursement for any expense, itemized receipts for each eligible expense greater than \$25 must be submitted within 60 days from the date of the transaction due to IRS substantiation requirements. The Lost/Missing Receipt Affidavit may be submitted as documentation for amounts up to \$75 and for amounts over \$75, the original itemized receipt is required. Note: documentation for amounts of less than \$25 should be maintained for audit evidence. The Travel Management Company (TMC) should be utilized for air, lodging, and car booking in order to be eligible for reimbursement. If you have a Society provided Purchase Card, it should be used for travel expenses.

### *B. Traveler and Approver 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. Failure to comply with these policies and procedures may result in disciplinary action, up to and including termination of employment or removal from volunteer position and/or role.

Supervisors with approval responsibilities are accountable for ensuring that all policies detailed herein have been adhered to before they approve employee expenses. Failure to comply with this requirement may result in disciplinary action, up to and including termination of employment.

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.

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

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

**C. Travel Booking (Air, Rail, Lodging, Car)**

All travel (including air, rail, lodging, and car rental) should be booked through the TMC, using the online travel booking tool.

All airline and most rail tickets are paid directly by the Society or ACS CAN. Travelers may not pay for business air with an individually issued Purchase card or other personal forms of payment. 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.

**Air**

Travelers should 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.
- Travelers are encouraged to book domestic travel at least 14 days prior to travel.
- Changes and cancellations to airline reservations are permissible only if the change/cancellation is made for business reasons.

<b>AIR</b>	
<b>Reimbursable</b>	<b>Non-reimbursable</b>
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
Passports and visas required for international travel	Airline memberships (Delta Sky Club, etc.)
International private car service with advance approval from travel management	Airline tickets purchased outside the 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 U.S.	

## Lodging

Preferred suppliers are 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 can secure a non-preferred hotel for at least \$20 less per night over the available preferred hotel through the TMC. Or 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).
- 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.
- 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.

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 (excluding alcohol)	Sundries
Business center expenses for business activities	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
Note: Meals at hotels must have detailed receipt. The Hotel folio is not adequate.	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 primary work location, are reimbursable. Mileage reimbursement for staff is at the current IRS-published rate for business travel, and for volunteers, it is at the IRS-published volunteer rate. All travelers should use a shuttle bus,

airport shuttle bus, taxi, rental car, shared car service or personal car based on the lowest-cost option available that is safe and logical and that meets travel time needs.

- 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.
- 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), should be booked with a preferred supplier that includes appropriate insurance that reduces the Society's liability in the event of damage to the vehicle.

- For business travel located away from the traveler's primary work location, 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.
- 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.
- 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.

GROUND TRANSPORTATION AND RENTAL CARS	
Reimbursable	Non-reimbursable
Car rental with preferred suppliers	Car upgrades
Mileage at current IRS rate 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.)	
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	
Shared economy car services (e.g. Uber or Lyft)	

## Meals

- Alcoholic beverages are a non-reimbursable expense.
- Meal gratuities should not exceed 20 percent of the total food and beverage costs.
- 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 > \$25 should be submitted for reimbursement. If a detailed receipt is not available or not provided, it must be noted and itemized on the available documentation.

Reimbursable meal expenses fall into three categories – travel, business, or minor 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.
- Minor fringe benefit – On occasion, it is acceptable to reimburse modest meals to employees as a nontaxable minor fringe benefit. To qualify, it must be reasonable and satisfy the following three conditions. The meal expense:
  - occurs only on an occasional basis.
  - occurs because work necessitates an extension of the employee's normal work schedule.
  - enables the employee to work beyond the normal work schedule.

## **D. 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 and lodging travel arrangements online as instructed by the meeting registration site.

Meals provided at a Society or ACS CAN meeting is an expense of the organization. If participants choose meals other than provided ones, the expenses are considered personal.

## **E. 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
- 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
- Spousal travel

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## **III. Related Links**

[Business Travel Accident Policy](#)

[Nationwide Flight Insurance](#)

[iTravel section of the Meetings and Travel Management community on Society Source](#)

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

[P-Card Policy](#)

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## **IV. Less Common Situations**

### **Air**

Travel agents are available for complex bookings with more than five (5) stops, changes, and international travel.

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 to upgrade.

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.

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) via [helpme.cancer.org](http://helpme.cancer.org).

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 TMC to request. The only exception is for same-day confirmations.

If an airline ticket is canceled or changed, it is the traveler's responsibility to communicate to the TMC prior to the departure date and time of the original flight. The 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. *(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. 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. Questions regarding travel should be directed to the Nationwide Travel Team via [helpme.cancer.org](http://helpme.cancer.org) using appropriate form in the iTravel section.

All international individual business travel must be requested using the [International Travel Request Form](#) which must be submitted before the TMC can begin to book the trip. Staff must complete the form when requesting international travel for volunteers/ guests traveling on behalf of the Society and ACS CAN.

**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.
- 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.

## Lodging

Certain geographical areas do not have adequate coverage from hotels that participate in the global distribution system [GDS] of the 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.

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.

## Car rental

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

## V. Revision History

Date	Revised By	Revisions
02.22.16	Denise House, Enterprise Governance & Corp Svcs	<b>Policy Format:</b> The Volunteer and Staff Travel & Expense Policy has been re- formatted into the policy template to align with the Operational Policy and Development Guidelines
		<b>BCD Travel Emergency After-hours Policy (Air &amp; Rail travel):</b> 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. <b>Note: This applies only to changes made outside of the TMC's normal operating hours 8am – 6pm eastern.</b>
		<b>Rental Car Calculator:</b> 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. <b>Note: The car calculator can be found in the iTravel section in the Meetings and Travel Management tab on Society Source</b>
03.02.16	Denise House, Enterprise Governance & Corp Svcs	<b>Rental Properties – (i.e. homes or condominiums):</b> are not permitted and are non-reimbursable for the use of Society meetings.
09.06.16	Denise House, Enterprise Governance & Corp Svcs	<b>Shared Economy Car Services – (i.e Uber and Lyft)</b> are reimbursable for business travel
08.04.2017	Catherine Mickle	Incorporate P-card Policy and re-organize to make information easier to locate.