

ALL NCEES TRAVELERS

GENERAL

Statement of purpose: It is the policy of NCEES to reimburse, either through travel stipend or direct reimbursement, its board of directors, committee members, employees, and others as authorized for reasonable expenses incurred while they are traveling on Council business. This policy provides a basis for the types and levels of expense that NCEES expects its travelers to incur while traveling on Council business. Because travel constitutes a large portion of the Council's controllable expenses, business trips should take place only if other avenues (e.g., remote/virtual meetings) are inadequate or inappropriate.

Intent: NCEES will reimburse approved travelers for reasonable and necessary expenses incurred in the authorized conduct of Council business. Although travelers should enjoy adequate comfort and convenience while traveling, travelers are expected to exercise the same care and judgment in incurring expenses as they would if traveling for personal reasons. NCEES will require explanations for any unusual expenses. Sightseeing and other personal expenses will not be reimbursed.

Guests: NCEES limits reimbursement to only those individuals who are directly involved in NCEES-sponsored activities. Accordingly, NCEES is unable to fund guest/spouse travel or related expenses, such as meals. Guests and spouses who participate in group meals will be required to reimburse NCEES.

Exceptions: The NCEES chief executive officer may make appropriate exceptions to this policy based on circumstances. Requests for exceptions must be submitted to travelexceptions@ncees.org.

TRAVEL ARRANGEMENTS

Agency: All air, train, and rental car reservations, where appropriate, must be made through the NCEES-designated travel agency, Travel Inc. No other agency may be used. By using one agency, the Council consolidates buying power, obtains volume discounts, and compiles travel expenditure data that can be used for fare and rate negotiations with vendors, thereby lowering overall travel costs.

Pre-trip ticket changes: Travelers may need to change flight schedules in advance of a meeting. Pre-trip changes may incur airline change fees, travel agency fees, and additional airfare. All changes must be made through the NCEES-designated travel agency, Travel Inc. No additional fees incurred by the change will be reimbursed unless the change is directed by NCEES.

En route changes: Changes to previously booked arrangements or emergency travel arrangements while en route must be made through the NCEES-designated travel agency, Travel Inc. The phone number is on each travel itinerary issued. Any changes not authorized by NCEES must be billed to a personal credit card.

AIR TRAVEL

Class of service: NCEES will pay the lowest logical airfare that meets the following criteria: 21-day or greater advance purchase and economy-class seating (excluding basic economy fares).

Business class is acceptable when the following requirements are met: (i) The flight has an elapsed time of over six consecutive hours for a single segment or has over 12 hours of flying time when a layover is required, (ii) business class has been specifically budgeted by NCEES, and (iii) permission has been granted by the NCEES CEO. Alternatively, permission to travel other than economy-class seating for medical reasons may be granted by the NCEES CEO through a travel exception.

First class may only be used when extenuating circumstances warrant the expense to NCEES and the following requirements are met: (i) All criteria for business-class seating have been met, (ii) it is the only class of service offered on the aircraft other than economy class, and (iii) permission has been granted by the NCEES CEO. All first-class fares shall be reported to the NCEES chief financial officer for tax compliance purposes.

Lowest logical airfare: Travelers are required to select the lowest available airfare within a 6-hour window (3 hours before and 3 hours after) of the requested departure or arrival time. To be considered logical, a flight must allow arrival in time for the scheduled meeting while minimizing the potential for changes or cancellations.

Connecting flights must be used if they provide a lower fare and do not increase total travel time by more than 2 hours.

Payment: All tickets must be direct-billed to the NCEES business travel account through Travel Inc. Travelers may not book directly with airlines or charge airfare to personal credit cards.

Personal stopovers: Travelers may need to fly to another destination while traveling to an NCEES-funded meeting. If a personal stopover increases the airfare, travelers are required to pay the additional airfare at the time of booking.

Upgrades: Travelers who choose to upgrade from the lowest logical airfare or upgrade their seat assignment may do so at their own expense. If upgrading requires purchasing a more expensive coach, business, or first-class fare than the lowest logical airfare, the traveler must pay the cost difference as well as the upgrade charge at the time of booking.

Frequent flyer points: Frequent flyer points are the property of the traveler. However, travel via a specific airline, route, or class of service that increases travel costs in order for the traveler to participate in a frequent traveler program is not permitted. Frequent flyer points are not reimbursed when used.

Unused tickets: Credit for unused or partially used tickets should be applied toward airfare for future NCEES trips. When booking travel, travelers should ask the agent if they have airfare credits on file that can be applied.

ALTERNATE MEANS OF TRAVEL TO MEETINGS

Driving: Travelers who opt to drive to an NCEES meeting location may do so without prior approval. Reimbursement will be made for a maximum of 1,000 miles at the IRS-recommended rate.

Train: Rail transportation should be booked directly with Travel Inc. Coach-class fares are funded.

Private aircraft or other means of transportation: Travelers who opt to travel by private aircraft or other means of transportation must obtain prior approval. Reimbursement will be the lowest logical airfare. Approval of travel by private aircraft or other means of transportation is for reimbursement purposes only and is limited to compliance with the NCEES Travel Policy and for no other purpose.

NCEES COMMITTEE TRAVELERS ONLY

PAYMENT METHODS

In lieu of a reimbursement, a predetermined travel stipend amount will be provided to travelers ahead of scheduled committee meetings; these travel stipends will be paid by NCEES via check and disbursed before the conclusion of the meeting. Travelers are expected to use this amount to cover business expenses and incidentals incurred to attend the committee meeting: meals, miscellaneous travel expenses, airport parking, etc. The stipend amount includes and anticipates that hotel shuttles, taxis, and other forms of low-cost transportation will be used.

Rental car expenses will not be reimbursed by NCEES.

NCEES BOARD OF DIRECTORS AND STAFF TRAVELERS ONLY

TRAVEL ARRANGEMENTS

Profiles: All travelers should maintain current profiles with the travel agency and update any information such as address changes, known traveler numbers, frequent traveler numbers, rental car program numbers, and passport numbers and expiration dates.

Air travel class of service: The NCEES board of directors can upgrade one level of service above economy class (e.g., comfort, main cabin extra, economy plus), not to include business class or first class.

RENTAL CARS

Low-cost options for ground transportation should be chosen when available. Car rentals should be reserved for situations when economical alternative options are not available.

International rentals: NCEES does not recommend using rental cars for travel outside the United States.

Preferred vendors: Rental cars must be booked through the NCEES-designated travel agency, Travel Inc.

Size limits and additional features: Unless unusual circumstances dictate otherwise, car rentals should be limited to midsize or smaller vehicles. Full-size cars may be used if two or more travelers carpool; the names of all travelers should be noted on the expense report.

Carpooling: Travelers are encouraged to carpool whenever possible. It is the responsibility of the traveler to arrange carpools with others who will be attending the meeting.

Insurance: NCEES carries collision damage waiver coverage on all cars rented with the NCEES-approved vendor in the continental United States. NCEES provides liability coverage for hired cars for rental and personal cars used while conducting business on behalf of NCEES. The daily car rental rate includes loss damage waiver insurance and, therefore, purchase of additional insurance is not an option at the counter. NCEES does not provide personal-injury insurance. All travelers should confirm coverage with their personal insurance agents.

Refueling: NCEES will cover the cost of fuel or electric vehicle charge required for the business travel. Travelers are responsible for returning the rental vehicle with the same fuel or charge level as when it was picked up. Fuel service charges or prepaid fuel options from the rental agency will not be reimbursed.

MEALS

Business meals: NCEES covers reasonable meal expenses incurred exclusively for the traveler during out-of-town business. Expenses for guests/spouses are not covered and must be paid for separately or reimbursed to NCEES. If a meal is provided at an event, separate meal costs will not be covered.

Receipt requirement: Electronic or scanned detailed receipts are required for all expenses over \$25. Receipts are encouraged for all amounts under \$25 to justify the expenditure and in accordance with Generally Accepted Accounting Principles (GAAP); without a receipt, a detailed description of the transaction should be provided, including vendor name, date, amount, and business purpose. Credit card statements are not acceptable as a receipt.

OTHER REIMBURSABLE EXPENSES

Personal cars: Personal cars should be used only for short trips, airport travel, etc., or when car sharing makes this alternative more economical than other forms of transportation. Reimbursement is made at the IRS-recommended rate. Contact NCEES for the current rate per mile.

Taxis and ride-sharing services: Taxi and ride-sharing service use should generally be limited to short trips when other less-expensive transportation is not available. Airport shuttles are often an economical alternative.

Other transportation expenses: NCEES reimburses the following transportation expenses related to NCEES business: parking fees; bridge, tunnel, and road tolls; and light rail, subway, and shuttle fees. No reimbursement will be made for traffic violations of any kind.

Currency conversion: Expenses in foreign currency are to be converted and reported in U.S. dollars at the actual exchange rate. This rate must be supported by receipts, such as a foreign currency exchange receipt. A charge-card statement may be used in addition to receipts to report the expense in U.S. dollars.

PAYMENT METHODS

Members of the NCEES board of directors and NCEES employees are requested to use their corporate charge cards whenever possible, especially for hotels and car rentals. Travelers should not make personal purchases on an NCEES credit card.

Air or train travel: Travelers must book air or train travel to the NCEES business account on file with the designated travel agency, Travel Inc.

REIMBURSEMENT

Expense reimbursement: Travelers must report all travel expenses to NCEES through the approved travel expense management software. Each business event should be reported separately.

Filing deadline: Expense reports must be submitted to NCEES within 30 days after the traveler returns from the trip. If expense reports are not submitted within 60 days, the expense amount may be treated as taxable income, per IRS guidelines.