



MEMBER TRAVEL POLICY

The National Association of State Procurement Officials (NASPO) has adopted this policy to govern the reimbursement of travel expenses for members traveling on NASPO business.

The policy applies to state, life and honorary members of NASPO and to non-members for whom travel reimbursement has been approved by NASPO. It does not attempt to cover every possible scenario; instead, this policy establishes adequate parameters for individuals to make appropriate judgments about the expenditure of funds. In cases where instructions or requirements differ by traveler category, they are noted in the policy.

A. AUTHORIZED TRAVEL

Only travel authorized by NASPO headquarters in advance is eligible for reimbursement. Authorized travel may include, but is not limited to, NASPO conferences, ValuePoint sourcing team meetings, partner events and other instances where an individual is designated as a representative of NASPO. Authorized travel may be arranged and paid by the traveler or the traveler's respective state or employer, then reimbursed by NASPO, consistent with this policy and as described in section C.

B. COMPLIANCE WITH OTHER POLICIES & SIGNATORY AUTHORITY

1. **State Employees.** NASPO respects and defers to the rules, regulations and policies of its member states with regard to state employee travel. To reduce paperwork and processing time, it is the preference NASPO that travelers use the Federal Per Diem (GSA) rate when allowable by their state in calculating reimbursement. If the traveler's state requires adherence to their specific state law or policy, NASPO will reimburse based on the state law or policy and the traveler can disregard the preference for the GSA rate. NASPO requires that state employees use NASPO's official form, unless otherwise required by their states, and submit only expenses allowed under state travel policies.
 - a. **Signatory Requirement.** The signature of the traveler and the NASPO primary member for the state are required when using NASPO's official form. The primary member may delegate signatory authority only with advance written notice to NASPO headquarters (headquarters@naspo.org). NASPO will rely upon such signatures to affirm compliance with NASPO and state policies. When the NASPO primary member is the traveler, NASPO recommends but does not require the signature of his/her superior. When the reimbursement is submitted by the state using a state-required form, NASPO will rely upon the state to affirm compliance with state policies and does not require dual signature.
2. **Life and Honorary Members.** Subject to NASPO's policies for Exchange and Annual Conference travel reimbursement, life and honorary members may be eligible for travel reimbursement after their participation levels have been confirmed. NASPO requires that travelers use NASPO's official form and submit only expenses allowed under this Travel Policy.
 - a. **Signatory Requirement.** The signature of the traveler is required. NASPO will rely upon the traveler's signature to affirm compliance with the policies of NASPO and the traveler's employer and assumes no liability for expenses not allowed.
3. **Non-members.** NASPO may offer travel expense reimbursement for non-member individuals invited as speakers, panelists, facilitators and/or special guests at NASPO conferences and events.

NASPO requires that travelers use NASPO's official form and submit only expenses allowed under this Travel Policy. Contractual agreements entered into by NASPO will incorporate this Travel Policy as attached or by reference.

- a. **Signatory Requirement.** The signature of the traveler is required. NASPO will rely upon the traveler's signature to affirm compliance with the policies of NASPO and the traveler's employer and assumes no liability for expenses not allowed.

C. REIMBURSEMENTS

1. **Payment to a State or State Agency.** For expenses paid by a traveler's state or state agency on behalf of a state employee, reimbursement will be paid directly to the state. The traveler or state may submit expenses using NASPO's form or the form required and approved by the state. If expenses undergo an approval process at the State level, approval documentation can take the place of expense documentation (itemized receipts). When a reimbursement request is submitted by the state, NASPO requires and relies upon the state to ensure submitted expenses are consistent with state requirements/policies, as described in section B.
2. **Payment to a Traveler.** For eligible expenses paid by the individual traveler, reimbursement will be paid directly to the traveler. The traveler must submit to NASPO within 60 days of incurring the expense:
 - a. The completed NASPO expense report for the current year with appropriate authorization, as described in section B.
 - b. Copies of itemized receipts and supporting documentation for all claimed expenses, as described in section D unless using per diem rates set by either the traveler's State or the Federal government.
 - c. If the traveler uses either the Federal Per Diem rates for NASPO travel or a State Per Diem rate, attach the relevant Per Diem schedule. Receipts are not required to be submitted under this method.
 - d. NASPO requires individuals to register for electronic payment to receive reimbursement through our service partner Bill.com. The sign up link is <https://app.bill.com/neo/onboarding/signup>. Please reach out to finance@naspo.org with any questions.
3. **Payment to a Traveler's Employer.** For eligible expenses paid by a traveler's employer other than a state or state agency, reimbursement will be paid directly to the employer. The traveler must submit to NASPO:
 - a. The completed NASPO expense report for the current year with appropriate authorization, as described in section B.
 - b. Copies of itemized receipts and supporting documentation for all claimed expenses, as described in section D.

D. DOCUMENTATION

Itemized receipts are required to document expenses if submitting for reimbursement of actual expenses. Meals and Incidentals should not exceed the Federal or State Per Diem rate for the locality. Receipts must document payment and the items/services purchased. Tips not shown on the receipt should be documented separately. Except under extraordinary circumstances, credit card statements do not suffice as receipts due to lack of detail.

E. TIMELY SUBMISSION

Reimbursement of expenses should be requested within two weeks after they are incurred (or immediately after payment by the state), whichever is later. Expenses submitted by individuals after 60 days will not be reimbursed per IRS rules.

F. TRANSPORTATION EXPENSES

NASPO will reimburse properly documented actual transportation expenses related to authorized travel, subject to section B and as outlined below. Travelers should use the most economical means for travel, giving consideration to schedules and meeting requirements.

1. **Air Transportation.** When travel by air is appropriate as the primary method of travel, the following parameters apply.
 - a. **Travel Agency.** For state members, NASPO has arranged the services of a travel agent to assist with flight arrangements. When arranged through NASPO's agent, such airfare may be paid directly by NASPO rather than reimbursed. Life and honorary members, speakers and others may not bill airfare directly to NASPO, except when directed to do so in advance by NASPO headquarters.
 - b. **Economy Class Airfare.** Travelers should book the most logical economy class rate (generally non-refundable) for air travel. Reservations should be made at least 21 days in advance of the travel to receive the most economical airfare.
 - c. **Changes and Cancellations.** Change fees imposed by the airline for voluntary changes made to a booked itinerary will be covered by the Traveler. For circumstances beyond the Traveler's control, please refer to section K herein. Extraordinary event or circumstance change fees may be reimbursed if direct payment through the NASPO travel agent is not available. NASPO defines "voluntary change" as a change made by a Traveler based on convenience and not due to an extraordinary situation beyond the Traveler's control (i.e., inclement weather, state of emergency, acts of God, major illness/death in the family, etc.).
 - d. **Baggage Fees.** NASPO will reimburse the expense of one checked bag each way. An itemized receipt is required for reimbursement.
 - e. **Optional Fees.** Early boarding, cancellation insurance, premium seats and other add-on fees are not reimbursable except under documented, extraordinary circumstance, such as a medical requirement or a request for a reasonable accommodation made by an individual with a disability.
 - f. **Airport Transportation.** NASPO will reimburse transportation between the airport and the traveler's home or office as outlined below.
 - i. **Personal Vehicle.** Mileage expenses by a member to drive a personal vehicle to and from the airport is reimbursable with documentation clearly identifying the distance traveled (e.g., turn-by-turn directions including total miles traveled or an image map with the highlighted route including total miles traveled). Reimbursement is only provided when the member is in the car. The mileage rate is the applicable IRS rate and identified in the expense form unless otherwise required by the traveler's state.
 - ii. **Taxi, Shuttle, or TNC (Transportation Network Company such as Uber/Lyft).** Fees to utilize taxi, shuttle, or TNC service to and from the airport during authorized travel is reimbursable with an itemized receipt.
 - iii. **Rental Cars.** Only in the instance of a great distance or other extraordinary circumstance, and with advance approval from NASPO headquarters, use of a rental car for ground transportation to and from the airport may be reimbursed.
 - g. **Airport Parking.** Fees for parking a personal vehicle at the airport during authorized travel is reimbursable with an itemized receipt. Travelers should use the most economical airport parking option.
 - h. **Ground Transportation.** When complimentary ground transportation between the airport and the hotel/meeting venue is not available, NASPO will reimburse ground transportation as outlined below.
 - i. **Taxi, Shuttle, or TNC (Transportation Network Company such as Uber/Lyft).** NASPO will reimburse the cost of utilizing taxi, shuttle or TNC service to and from the hotel/meeting venue. An itemized receipt is required.

1. If the trip is shared by other state members or individuals eligible for full expense reimbursement, all the names must be listed on the itemized receipt.
 2. Travelers should not fund the transportation of other individuals or guests unless doing so does not increase the collective fee of all travelers.
 - ii. **Rental Cars.** Use of a rental car for ground transportation must be approved by NASPO in advance of travel. Rental cars will be approved for reimbursement only if the cost is comparable to or less than the cost to utilize taxi or shuttle service, or if deemed necessary by NASPO.
2. **Passenger Vehicle Transportation.** When use of a passenger vehicle as the primary method of travel is more cost effective, the following parameters apply.
 - a. **Personal Cars.** When the use of a personally owned vehicle as the primary method of travel is appropriate, NASPO will reimburse toll fees, parking fees, and mileage to and from the meeting venue.
 - i. Mileage documentation must clearly identify the distance traveled (e.g., turn-by-turn directions including total miles traveled or an image map with the highlighted route including total miles traveled).
 - ii. Reimbursement shall be at the current IRS mileage reimbursement rate or the rate required by state policy, if different.
 - iii. For trips totaling more than 500 miles, reimbursement is capped at 500 miles not including parking and tolls.
 - iv. Insurance and gasoline costs are included in the mileage rate and thus are not reimbursable expenses.
 - b. **Rental Cars.** Rental cars should be used for primary travel only when necessary and financially justified, not as a matter of personal convenience, and must be approved by the NASPO Finance Department (finance@naspo.org) in advance of the travel. When approved, NASPO will reimburse car rental fees, parking fees, insurance, gasoline and tolls with an itemized receipt or proof of payment.
 - i. Vehicles up to an intermediate (mid-size) class are acceptable. The next size class may be rented when three or more members are traveling together.
 - ii. Rental cars should be refueled prior to return. A “prepaid fuel” or similar option should not be elected for the return of the car unless absolutely necessary.
 - iii. Mileage, GPS, additional drivers, or other elective add-on costs are not reimbursable expenses.
3. **Other Modes of Transportation.**
 - a. **Rail.** Passenger train fares are reimbursable at the most logical economy class fare with an itemized receipt.
 - b. **Other Transportation.** In some circumstances, other modes of transportation may be deemed necessary. Travelers must notify NASPO about any special transportation needs in advance of the travel, and NASPO will determine appropriate reimbursement procedures.

G. LODGING EXPENSES

When authorized travel requires an overnight stay, NASPO will reimburse lodging expenses, subject to section B and as outlined below.

1. **NASPO-sponsored Events and Conferences.** NASPO contracts hotel accommodations for NASPO conferences based on negotiated rates for specified dates.
 - a. NASPO will determine and announce the number of nights to be funded by NASPO.
 - b. Additional nights beyond those established by NASPO will be at the traveler's expense, unless authorized by NASPO headquarters in advance.
 - c. Lodging at hotels other than the official conference hotel or overflow hotel will be at the traveler's personal expense, unless authorized by NASPO in advance.

2. **Other NASPO-related Travel.** When traveling on behalf of NASPO, individuals will be reimbursed for lodging expenses.
 - a. Travelers must arrange accommodations at the recommended facilities and provide itemized receipts for guest room expenses upon completion of travel.
 - b. Travelers should request government or conference rates (when applicable/available).
 - c. If a traveler chooses not to stay at the recommended facility, reimbursement will not exceed the recommended lodging rate.

H. MEAL EXPENSES

NASPO will reimburse meal expenses for authorized travel, subject to section B and as outlined below.

1. NASPO will reimburse meals associated with travel to and from a meeting/event, as well as the traveler's meals onsite, unless such meals are offered as part of the meeting/event.
2. Meals are reimbursed at the U.S. General Services Administration (GSA) government per diem rate unless otherwise required by the State. *Per diem rates can be found at <http://www.gsa.gov/perdiem>. Rates are set each federal fiscal year.*
3. Meal expenses should not be exorbitant. It is the responsibility of the traveler to ensure that expenses are reasonable and consistent with NASPO and state policies.
4. If a meal tab is split among multiple state members or individuals eligible for full expense reimbursement, all the applicable names must be listed on the itemized receipt and submitted as an attachment to the NASPO expense report.
5. Travelers should not fund the meal expenses of other individuals or guests. NASPO does not reimburse meals for non-members (unless otherwise specified) or those who do not qualify for reimbursement.
6. Alcohol is not permissible for reimbursement under this policy and should not be submitted.

I. MISCELLANEOUS EXPENSES

NASPO will reimburse for allowable miscellaneous expenses for NASPO-related travel, subject to section B and as outlined below.

1. **Internet Access.** If Internet access is not complimentary, NASPO will reimburse for hotel internet access with an itemized receipt. In-flight and airport wireless access is also reimbursable with an itemized receipt.
2. **Tips.** Tips for services offered by bellhops, sky caps, housekeepers, shuttle/taxi drivers and servers are reimbursable and included under incidentals if using the per diem reimbursement.
 - a. Documentation of tips, including the date, amount and information regarding services rendered, must be provided in lieu of a receipt for cash tips.
 - b. The amount offered in gratuity should reflect accepted standards: \$1-2 per bag for baggage handling, \$2-\$5 per night for housekeeping services, 15-20 percent for meals, \$1-\$2 per trip for shuttle drivers, and 10- 20 percent for taxi fares and TNC (Transportation Network Company such as Uber/Lyft).

J. PROHIBITED EXPENSES

While NASPO endeavors to minimize out-of-pocket expenses for travelers, some expenses are not reimbursable under this Travel Policy.

- Expenses not reimbursable under state employee policies
- Alcoholic beverages
- Exorbitant meals and meals provided during the conference or event (not noted as "optional")
- Personal services (e.g., barber, hairdresser, massages, etc.)
- Personal items (e.g., clothing, luggage, toiletries, chewing gum, etc.)

- Entertainment (e.g., movies, newspapers, magazines, books, etc.)
- Laundry or valet service
- Spouse or guest expenses
- Personal automobile repairs
- Upgrades (e.g., airfare class, hotel, car, etc.)
- In-flight or in-room movies
- Frequent flier or similar award programs
- Childcare or pet care
- Dues to private clubs
- Credit card delinquency fees, finance charges, or annual fees
- Parking tickets or traffic violations
- Fines, penalties and legal fees
- Flight cancellation insurance
- Tips in excess of accepted standards (see section I, 2b).

K. Extraordinary Event or Circumstance

In the event of a delayed, changed, or cancelled travel due to an extraordinary event or circumstance beyond the traveler's control (i.e., inclement weather, state of emergency, acts of God, major illness/death in the family, etc.), reimbursement for additional expenses will be allowable according to the following guidelines:

1. Traveling TO a NASPO Event:
 - a. Travelers should notify NASPO as soon as possible of flight or travel cancellations which impact arrival dates. NASPO will coordinate with the event hotel to update arrival dates and mitigate additional fees related to hotel cancellations or delayed arrivals.
 - b. Travelers should work directly with the airline or travel agency regarding rebooking of cancelled or delayed travel. Airline (or other travel) change fees are allowable up to the total, original value of the ticket in cases where changing to a different airline or mode of transportation will allow for the traveler to attend the event (and remaining with the original travel plans will not). Upgrade fees are not allowable/reimbursable.
 - c. NASPO will not be responsible for rebooking or cancellation charges, of any kind, for companions accompanying a traveler to a NASPO event.
2. Return travel FROM a NASPO Event:
 - a. Transportation Expenses
 - i. Except in extreme cases, fees incurred by changing travel plans pre-emptively in an attempt to avoid cancellation or delays are not allowable/reimbursable.
 - ii. When alerted by the airline of travel-related cancellations or delays, travelers should work directly with the airline or travel agent on rebooking. Weather or emergency-related rebooking on the same airline should not result in additional fees; however, service fees for calls to the travel agent or airline are reimbursable, with receipts.
 - iii. Change fees or additional expenses related to rebooking on other airlines or alternate modes of transportation are allowable only when they result in a lower overall cost (i.e., the change fees are less than additional hotel night(s) and other meals that would be necessitated by the alternative itinerary proposed by the original carrier).
 - iv. NASPO will not be responsible for rebooking or cancellation charges, of any kind, for companions accompanying a traveler to a NASPO event.
 - b. Lodging Expenses
 - i. In some cases, NASPO may be able to extend group rates at the host conference hotel for travelers whose departure travel is delayed or cancelled. NASPO will notify travelers of this option. As specific procedures and steps for booking the additional nights will be determined by the host hotel, NASPO will provide those

instructions on-site. All affected travelers should follow the provided instructions to ensure qualification for expense coverage or reimbursement.

- ii. If travelers have already checked out of the host hotel when travel is cancelled or delayed, or if group rates are not extended at the host hotel, travelers are responsible for making their own overnight accommodations. Additional hotel night(s) at another hotel are reimbursable as follows:
 - 1. The rate should be no more than 15% higher than the group rate at the event hotel.
 - 2. Travelers should make reservations only for the night(s) necessary to complete revised return travel.
 - 3. Travelers should request government rates (when applicable/available).
 - 4. All itemized receipts must be maintained and submitted for reimbursement.
- c. Travel expenses as outlined in this policy including, but not limited to, airport parking, airport transportation, meals, tips and miscellaneous expenses are reimbursable for additional travel days as outlined in this policy.
- d. **All documentation requirements, as outlined in this policy, must be followed in order to receive reimbursement for additional expenses due to delayed or cancelled travel.**