

## **CEF Board of Trustees Travel Expense Reimbursement Policy**

### **1. Purpose.**

The Board of Trustees of the Chemical Educational Foundation (CEF) recognizes that representation from industry, education, and former participants is critical to advance the mission of the organization. Further, Trustees are required to travel and incur expenses as part of their service to CEF.

The purpose of this Policy is to ensure that (a) the financial limitations of Trustees representing education and former participants do not limit board service ("Eligible Trustees"), (b) adequate cost controls are in place, (c) travel and other expenditures are appropriate, and (d) a consistent approach exists for the timely reimbursement of authorized expenses incurred by Eligible Trustees.

It is the policy of CEF to reimburse only reasonable, necessary, and pre-approved expenses actually incurred by Eligible Trustees.

When incurring travel expenses, CEF expects Eligible Trustees to:

- Always seek employer and/or external funding support first
- Exercise discretion and good business judgment with respect to those expenses
- Be cost-conscious and spend CEF's money as carefully and judiciously as the individual would spend his or her own fund.
- Report expenses, supported by required documentation, as they were actually spent

### **2. Reimbursable Travel**

The following qualify for reimbursable travel:

- All Board of Trustees meetings and related planning meetings
- National *You Be The Chemist* Challenge and related events
- All other travel undertaken at the request of the President of the Board of Trustees and/or Executive Director

### **3. Itemized Expense Summary**

An itemized expense summary is required for all requests for reimbursement. Reimbursement requests must be submitted within two weeks of the completion of travel and must include:

- Name of Trustee (including date and signature)
- Date, origin, destination, and purpose of the trip
- Vendor receipts for all expenses (Not credit card statement)

### **4. General Travel Requirements.**

Eligible Trustees traveling on behalf of CEF may incorporate personal or business travel with their CEF-related trips; however, Eligible Trustees should not arrange CEF travel at a time that is less advantageous to CEF or involving greater expense to CEF in order to accommodate personal or business travel plans. Any additional expenses incurred as a result of personal or business travel, including but not limited to extra hotel nights, additional stopovers, meals, or transportation, are the sole responsibility of the Eligible Trustee and will not be reimbursed by CEF. Expenses associated with travel of an Eligible Trustees' spouse, family, friends, or business associates will not be reimbursed by CEF.

### **5. Reimbursable Expenses**

The following expenses are considered reimbursable:

a. Airfare: The lowest available coach or economy fare (nonstop when possible) should be booked (e.g. 21 day advance purchase). Board of Trustee meeting dates are published well in advance allowing for timely reservations. Costs related to upgrades utilizing frequent flyer miles are not reimbursable. Delays (weather, mechanical) in travel beyond the control of the Trustee will generally be considered reimbursable, however, a full justification/explanation and appropriate documentation must accompany the expense summary.

b. Lodging: (i) For travel (Section 2) where CEF has negotiated specific hotel rates, only the negotiated rate is reimbursable. If the Trustee chooses alternative hotel accommodations, only the amount of the negotiated rate (or the actual rate at the alternative hotel if less than the negotiated rate) will be reimbursed toward the stay at the alternative lodging. (ii) Lodging for travel with no CEF negotiated rate shall be booked prudently and reasonably.

c. Transportation: (i) Transportation to and from the airport to hotels should be by the lowest cost available – i.e. – hotel/airport shuttle, metro, taxi, ride share. (ii) Reimbursement for the use of rental cars is not authorized unless they are required for CEF business or are less expensive than the normal mode of transportation. Advance approval by the President or Executive Director is required. Rental cars must be refueled prior to return.

d. Meals: (i) For travel (Section 2) where CEF is providing meals for Trustees, alternative meals are not eligible for reimbursement. (ii) Expenses for meals not provided by CEF, including tips, are eligible for reimbursement. Trustees should ensure that costs are kept to a reasonable level.

e. Airport Parking: Airport parking costs are reimbursable. Trustees should select the lowest-cost option.

## **6. Non-Reimbursable Expenditures**

CEF maintains a strict policy that expenses in any category that could be perceived as lavish or excessive will not be reimbursed, as such expenses are inappropriate for reimbursement by a nonprofit organization. Expenses that are not reimbursable include, but are not limited to:

- (a) Fees for upgrades of air, hotel, and auto costs
- (b) Entertainment
- (c) Personal travel during a CEF trip
- (d) Spousal, family, and friend expenses
- (e) Limousine travel
- (f) Meetings/events which are not approved by the President or Executive Director
- (g) Laundry service
- (h) Traffic citations
- (i) Auto repairs
- (j) In-room movies, costs for use of hotel gym, massage, or sauna
- (k) Valet parking, unless there is no “self-park” option or self-parking is an unsafe option.
- (l) In-room internet access for personal, non-business-related use

## **7. Exceptions**

Exceptions to this policy must have the prior written approval of the President and/or Executive Director.