



## **AAOA/FOUNDATION VOLUNTEER & STAFF TRAVEL POLICY**

It is the policy of the AAOA and its Foundation to provide those who travel on behalf of the organization with reasonable levels of comfort and convenience. AAOA expects the traveler to exercise discretion with AAOA funds and anticipates that neither the association nor its traveler will profit from these expenses.

The Travel Expense Reimbursement Policy is the guide by which all AAOA members and staff should adhere when there is a travel-related expense associated with attending specific meetings or events on behalf of the AAOA/F.

The reasonable travel expenses of authorized members and the Boards of Directors for participation at AAOA/F meetings not held in conjunction with the Annual Meeting, as well as the expenses of members authorized to officially represent the AAOA/F at other related meetings, are reimbursable. Unauthorized expenses incurred by an AAOA member or staff will not be reimbursed.

The AAOA travel policies and procedures outlined below are to serve as a guideline for AAOA-related travel, entertainment, and miscellaneous expense reimbursements. AAOA recognizes that in some isolated cases, business-related expenses might need to be reviewed on a case-by-case basis; however, this primarily applies if the expense in question was not discussed in this policy.

**Reimbursable Expenses**—Reimbursable expenses include non-refundable coach airfare and one checked or carry on bag, ground transportation (i.e. cab; shuttles), airport parking (long-term), and meals that are not provided as part of the meeting, hotel accommodations, and reasonable tips (15-20%).

**Authorization**—All travel on behalf of the AAOA must be for budgeted travel and approved in writing at least 30 days in advance by the Executive Director or key program staff.

### **Transportation:**

**Airfare**—Air travel coach class reservations must be made at least 14 days in of travel date to the airport nearest the meeting. All fares over \$600 must be pre-authorized and shown to be the lowest fare available at that time.

- The traveler is expected to use the lowest logical fare available
- The traveler will need approval prior to purchasing a ticket that exceeds \$600
- Repurchase of tickets and/or ticket change fees will not be reimbursed unless pre-authorized.
- Upgrades for travel are not reimbursable.

Late purchase fares will only be reimbursed up-to-\$600. The purchase of a full refundable coach fare, or travel to a distant airport in order to obtain special benefits, is not acceptable and will only be reimbursed up-to the cost of a non-refundable coach ticket to the nearest airport. If super-saver fares requiring a Saturday night stay are purchased, the additional hotel night and accompanying meal expense will be reimbursed only if an overall savings can be demonstrated.



**Trains and Personal Automobile**—Travel by train will be reimbursed up-to the cost of a round trip standard coach class airline ticket. Travel by automobile will be reimbursed at the mileage rate in use by the IRS, as long as the total amount – to include any parking related charges – does not exceed the amount of economy airfare. Documentation (i.e. Google maps, MapQuest, etc.) indicating route, starting and ending location addresses, and miles traveled must accompany the request for reimbursement. Overnight lodging and extra meal expenses will not be reimbursed for automobile travel when air transportation is available.

**Ground Transportation**—Personal auto mileage, airport parking (long term), and cab/Uber/Lyft expenses to and from the airport are reimbursable expenses, as are cab fares between the airport and the meeting hotel when free hotel shuttle service is not available. Cab/Uber/Lyft fares for transportation to and from restaurants within reasonable proximity of the meeting hotel are also reimbursable. The cost of sedan/limo service is not reimbursed, unless it can be documented to be no more than local cab fare.

**Rental Cars**—Reimbursement is not made for rental cars, or related parking charges, unless such rental is demonstrated to be cost effective and pre-approved by the Executive Director.

If booking one's own travel, please share itinerary with staff in advance to help coordinate other logistics.

**Special Travel Issues/Cancellations** – In the event of inclement weather, which prohibits the member from attending a scheduled meeting due to flight cancellations or dangerous road conditions to the airport, the member is required to apply the unused ticket toward the next scheduled AAOA/F meeting s/he is scheduled to attend (other than the Annual Meeting). Hotel reservations must be cancelled as soon as the member is aware travel will not occur to avoid a “no show” charge.

**Lodging/Hotel** – Hotel reservations will be made by AAOA staff. AAOA will not pay for hotel reservations secured outside of its designated hotel unless prior authorization has been granted. AAOA will not be responsible for room upgrades or incidentals.

**Meals and Entertainment**—Cost of reasonable meal expenses, including normal tips (15-20%), are reimbursable.

- Maximums permitted **per meal** are \$20 for breakfast, \$35 for lunch, and \$75 for dinner. These amounts may not be combined.
- Meals are NOT reimbursable when that meal is provided at the meeting or other related events.
- Entertainment expenses must be pre-approved by an authorized staff member and are reimbursable only when clearly a proper and necessary adjunct to the conduct of AAOA or Foundation business.

**Tips**—Tips for meals and ground transportation require notation on receipts. Tips should be no more than 20% of the bill and, if considered excessive, will not be reimbursed. Reasonable tips for baggage handling and maid service will be reimbursed; receipts are not required.

**Non-Reimbursable Expenses**—Transportation upgrades, sedan/limo service, hotel room upgrades, WiFi, in-room movies and minibar items, magazines, telephone calls, valet/dry cleaning charges, rental cars and their associated expenses (gas, parking, etc.) when not pre-authorized by the Executive Director, and expenses of spouses and companions. Also, travel and lodging expenses incurred because of member error will not be reimbursed.



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**Documentation Requirements**—All requests for reimbursement must be properly completed and submitted on the official AAOA/F Travel Expense Reimbursement Request form. Completed forms should be submitted within 30 days from the date the travel began. The AAOA/F maintains the right to deny reimbursement of expenses that are submitted after 90 days from the date the travel began, or after the close of the fiscal year (Dec 31), whichever comes first. Original receipts must be submitted for all individual expenses.