



## NASPO VALUEPOINT TRAVEL POLICY

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NASPO ValuePoint has adopted this policy to govern the reimbursement of travel expenses for individuals traveling on NASPO ValuePoint business.

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

### B. COMPLIANCE WITH OTHER POLICIES & SIGNATORY AUTHORITY

1. **State Employees.** NASPO ValuePoint respects and defers to the rules, regulations and policies of its member states with regard to state employee travel. In situations where NASPO ValuePoint's policy—including eligible expenses, amounts and required documentation—differs from state policies, travelers must adhere to the integrity of applicable state policies. NASPO ValuePoint requires that state employees use NASPO ValuePoint'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 or the NASPO ValuePoint designated representative for the state are required when using NASPO ValuePoint's official form. NASPO ValuePoint will rely upon such signatures to affirm compliance with NASPO, NASPO ValuePoint and state policies. When the NASPO primary member or the NASPO ValuePoint designated representative is the traveler, NASPO ValuePoint 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 ValuePoint will rely upon the state to affirm compliance with state policies and does not require dual signature.
2. **Non-state.** NASPO ValuePoint may offer travel expense reimbursement for non-state individuals invited as speakers, panelists, facilitators and/or VIP special guests at conferences and events. NASPO ValuePoint requires that travelers use NASPO ValuePoint's official form and submit only expenses allowed under this Travel Policy.
  - a. Signatory Requirement. The signature of the traveler is required. NASPO ValuePoint will rely upon the traveler's signature to affirm compliance with the policies of NASPO ValuePoint 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 and supporting documentation using NASPO ValuePoint's form or the form required and approved by the state. When a reimbursement request is submitted by the state, NASPO ValuePoint requires and relies upon the state to ensure submitted expenses are consistent with state requirements/policies, as described in section B.
  - a. If using a state form, it must be clear as to the traveler, reason for travel or contract supported by travel. If this is not clear, the state will be asked to clarify before payment can be processed.
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 ValuePoint:
  - a. The completed NASPO ValuePoint expense report (for the current year) with appropriate authorization, as described in section B.
  - b. Copies of receipts and supporting documentation for all claimed expenses, as described in section D.
  - c. If using a state form, it must be clear as to the traveler, reason for travel or contract supported by travel. If this is not clear, the traveler will be asked to clarify before payment can be processed.
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 ValuePoint:
  - a. The completed NASPO ValuePoint expense report (for the current year) with appropriate authorization, as described in section B.
  - b. Copies of receipts and supporting documentation for all claimed expenses, as described in section D.
  - c. If using a state form, it must be clear as to the traveler, reason for travel or contract supported by travel. If this is not clear, the traveler will be asked to clarify before payment can be processed.

## D. DOCUMENTATION

Itemized receipts are required to document expenses. 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 must be requested within two weeks after they are incurred (or immediately after payment by the state), whichever is later. NASPO ValuePoint may, at its sole discretion, decline to reimburse expenses not properly submitted within the required two-week timeframe.

## F. TRANSPORTATION EXPENSES

NASPO ValuePoint 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. NASPO ValuePoint has arranged the services of a travel agent to assist with flight arrangements. When arranged through NASPO ValuePoint's agent, such airfare may be paid directly by NASPO ValuePoint rather than reimbursed.
  - 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 14 days in advance of the travel to receive the most economical airfare fees.
  - c. Changes and Cancellations. Change fees for a booked itinerary will be covered only when preauthorized by NASPO ValuePoint headquarters. In the event of voluntary cancellation or rebooking, traveler must notify and receive approval of NASPO ValuePoint in advance. Emergency change fees may be reimbursed if direct payment through the NASPO ValuePoint travel agent is not available.
  - d. Baggage Fees. NASPO ValuePoint will reimburse the expense of one checked bag each way. A 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.
  - f. Airport Transportation. NASPO ValuePoint will reimburse transportation between the airport and the traveler's home or office as outlined below.
    - i. Personal Vehicle. Mileage expenses 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). The mileage rate is set by NASPO ValuePoint (GSA) and identified in the expense form.
    - ii. Taxi or Shuttle. Fees to utilize taxi or shuttle service to and from the airport during authorized travel is reimbursable with a receipt.
    - iii. Rental Cars. Only the instance of great distance or other extraordinary circumstance, and with advance approval from NASPO ValuePoint 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 a 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 ValuePoint will reimburse ground transportation as outlined below.
    - i. Taxi or Shuttle. NASPO ValuePoint will reimburse the cost of utilizing taxi or shuttle service to and from the hotel/meeting venue. A 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 receipt.
      2. Travelers should not fund the transportation of other individuals or guests unless doing so does not increase the fee.
    - ii. Rental Cars. Use of a rental car for ground transportation must be approved by NASPO ValuePoint 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 ValuePoint.
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 ValuePoint 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 shall not exceed the cost of the most logical economy class airfare.
    - iv. Insurance and gasoline costs are included in the mileage rate 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 NASPO ValuePoint headquarters in advance of the travel. When approved, NASPO ValuePoint will reimburse car rental fees, parking fees, insurance, gasoline and tolls.
    - 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 a receipt.
  - b. Other Transportation. In some circumstances, other modes of transportation may be deemed necessary. Travelers must notify NASPO ValuePoint about any special transportation needs in advance of the travel, and NASPO ValuePoint will determine appropriate reimbursement procedures.

## G. LODGING EXPENSES

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

- 1. **NASPO and NASPO ValuePoint-sponsored Conferences and Meetings.** NASPO and NASPO ValuePoint contract hotel accommodations for NASPO conferences and NASPO ValuePoint Meetings based on negotiated rates for specified dates.
  - a. NASPO ValuePoint will determine and announce the number of nights to be funded by NASPO ValuePoint.
  - b. Additional nights beyond those established by NASPO ValuePoint will be at the traveler's expense, unless authorized by NASPO ValuePoint 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 ValuePoint in advance.
- 2. **Other NASPO ValuePoint-related Travel.** When traveling on behalf of NASPO ValuePoint, individuals will be reimbursed for lodging expenses.
  - a. Travelers must arrange accommodations at the recommended facilities, and provide 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 ValuePoint will reimburse meal expenses for authorized travel, subject to section B and as outlined below.

1. NASPO ValuePoint 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 will be reimbursed with itemized receipts detailing the items purchased and showing payment. Meals for which itemized receipts are not available may be reimbursed at the U.S. General Services Administration (GSA) government per diem rate. *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 ValuePoint 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 receipt and submitted as an attachment to the NASPO ValuePoint expense report.
5. Travelers should not fund the meal expenses of other individuals or guests. NASPO ValuePoint does not reimburse meals for non-members (unless otherwise specified) or those who do not qualify for reimbursement unless approved by the NASPO ValuePoint CEO.
6. Alcohol is not permissible for reimbursement under this policy and should not be submitted.

#### I. MISCELLANEOUS EXPENSES

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

1. **Internet Access.** If Internet access is not complimentary, NASPO ValuePoint will reimburse for hotel internet access with a receipt. In-flight and airport wireless access is also reimbursable with a receipt.
2. **Tips.** Tips for services offered by bellhops, sky caps, housekeepers, shuttle/taxi drivers and servers are reimbursable.
  - 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, \$1-2 per trip for shuttle drivers, and 10 to 20 percent for taxi fares.

#### J. PROHIBITED EXPENSES

While NASPO ValuePoint 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 (section B)
- Alcoholic beverages
- Exorbitant meals and meals provided by the conference or event (not noted as "optional")
- Personal services (e.g., barber, hair dresser, massages, etc.)
- Personal items (e.g., clothing, luggage, toiletries, 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
- Child care 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