

ATTACHMENT B

CAPPA TRAVEL POLICY Updated January 20, 2017

A. General

1. The association reimburses individuals for expenses incurred while conducting authorized CAPPA business.
2. CAPPA policy for travel expenses follows the requirements established by the Internal Revenue Service to protect both CAPPA and participating individuals from violation of tax regulations.
3. The basic categories of travel are:
 - i. Executive Committee and standing committee members;
 - ii. Standing Committee Chairs that serve as CAPPA representatives to corresponding APPA Committees and who are expected to attend the APPA mid-year and annual meetings; currently, these are the senior Business Partner, Information and Research, Professional Development, and Professional Affairs / Awards and Recognition Committees (as of 2017, these are two positions in CAPPA);
 - iii. Toolkit Trainers and Toolkit trainer candidates; and
 - iv. Any other person traveling on behalf of CAPPA.
4. CAPPA standing committees generally meet bi-annually: at the CAPPA Annual Meeting and at the mid-year Technology Conference. Members selected to standing committees are generally expected to commit to attending these two meetings and the associated committee meetings.
5. APPA Committees meet bi-annually: at the APPA Annual Meeting and in December at the APPA offices.
6. APPA Junior and Senior Representatives and incoming Junior Representative meet bi-annually: at the APPA Annual Meeting and in February at the APPA offices.
7. Toolkit Trainers and Toolkit trainer candidates travel to conduct Supervisor's Toolkits as requested and hosted.
8. All travel must be approved in advance by the Executive Committee, either through a documented blanket action or by an individual request and action. If there is any doubt, the traveler shall submit a request to the CAPPA treasurer in advance of travel as there is no guarantee of reimbursement after the fact.

B. Current approvals (as of January 2017)

1. The CAPPA Secretary will be responsible for keeping this section up-to-date. Documented approvals for travel are listed below; however, all travel expenses must be in accordance with this Travel Policy:
 - i. Executive and standing committee members: Up to two nights' lodging expenses will be allowed for members attending the bi-annual committee meetings. The number of night's lodging reimbursed will depend upon the meeting/conference and airline flight schedules. Airfare and mileage to attend these committee meetings are not reimbursable.
 - ii. APPA Junior and Senior Representatives and in-coming Junior

Representative: Travel and lodging to attend APPA committee meetings in February and at the APPA annual summer conference. Reimbursement shall be for those expenses not otherwise reimbursed by APPA. This reimbursement shall be for the number of nights to attend the committee meetings based on flight schedules but not the conference itself. Additional nights to attend the annual conference or for site-seeing shall be the responsibility of the traveler.

- iii. The senior Business Partner and Chairs of the Information and Research, Professional Development, and Professional Affairs / Awards and Recognition Committees (as of 2017, these are two positions in CAPP A): Travel and lodging to attend APPA committee meetings in December and at the APPA annual summer conference. Reimbursement shall be for those expenses not otherwise reimbursed by APPA. This reimbursement shall be for the number of nights to attend the committee meetings based on flight schedules but not the conference itself. Additional nights to attend the annual conference or for site-seeing shall be the responsibility of the traveler.
- iv. Toolkit trainers and Toolkit trainer candidates: All reasonable expenses incurred to execute the Toolkit. Toolkit trainers are encouraged to use a single rental car unless impractical for some reason and requested in advance.
- v. The Historian and the Official Photographer: All expenses required to execute their duties and attend the bi-annual CAPP A conferences.
- vi. The designee to the Mexico Initiative: Approved annually in order to report to the Executive Committee at the bi-annual CAPP A meetings and to attend APPA Mexico Initiative meetings. This reimbursement shall be for the number of nights to attend the committee meetings based on flight schedules but not any associated conference. Additional nights to attend the APPA/CAPP A annual or CAPP A mid-year conference or for site-seeing shall be the responsibility of the traveler. Reimbursement for APPA Mexico Initiative meetings shall be for those expenses not otherwise reimbursed by APPA. Reimbursement for trips to Mexico or other locations/events may be approved by the Executive Committee, but only in advance. Travel in this role will be coordinated with APPA and is likely to vary from year to year. The CAPP A representative to the Mexico Initiative will coordinate these requests with the CAPP A President and the APPA Executive Vice President and will submit to the Executive Committee.

C. Exceptions

1. Exceptions to this travel policy may be made in special circumstances by a majority vote of the Executive Committee (quorum required).

D. Allowable Expenses

1. Travel: Includes coach-class air fare for the most direct route, cab or shuttle fare, fare for public transportation, mileage (at the current IRS rate), parking expenses, and tolls. In-advance purchase of airline tickets and weekend stays are encouraged whenever a savings is possible.
 2. Where a rental car is provided, as in the case with the Toolkit trainers, the option for full insurance should be accepted.
 3. Travel expenses will generally be paid for all approved CAPP A functions other than the regular regional committee meetings, which meet bi-annually.
 4. Meals: Individuals are expected to participate in any planned functions which include meals. CAPP A's meal allowance will be the federal government per diem standards (see <http://www.gsa.gov/perdiem>). No receipts for meals need be submitted. The appropriate per diem allowance will be deducted from the day's per diem for each meal provided by CAPP A in accordance with the chart at <http://www.gsa.gov/perdiem> (see Meals and Incidental Expense Breakdown), regardless of whether the member chose to actually participate in that meal. Up to 48 hours per diem is allowable for travel to bi-annual committee meetings.
 5. Lodging: Standard, non-smoking rooms will be reimbursable at the single rate.
 6. Tips: Cash tips, within a customary range to service employees of the airport and hotel which are not included as part of the transportation, are covered.
- E. Excluded Expenses
1. Private guests: If an individual travels with a private guest while on CAPP A business, expenses for the guest must be covered from his/her own funds.
- F. Procedures
1. A CAPP A Expense Report must be used to request reimbursement. The form must be filled out completely. (Expense Report form available on CAPP A web-site, www.cappaedu.com)
 2. For audit documentation purposes, all required receipts should be attached to the report.
 3. The expense report must be submitted within three weeks of completion of travel.
 4. Executive Committee members will submit form to CAPP A Treasurer.
 5. Committee members will submit form to Committee Chair for review by the Committee Chair.
 6. Committee chairs shall submit form to the President who will review and submit to the Treasurer.
 7. Toolkit trainers and Toolkit trainer candidates shall submit form to the Chair of the Professional Development Committee who will review and submit to CAPP A treasurer.
 8. Forms may be submitted electronically via email, mailed through the US Postal Service, or faxed to CAPP A treasurer.