



MEETING/TRAVEL POLICY

For the purpose of this policy the following will apply:

National PTA Sponsored Events: Defined as any event scheduled, planned and implemented by National PTA, which are attended by members of the governance structure.

Non-National PTA Sponsored Events: Defined as any event scheduled, planned or implemented by any organization or company other than National PTA, but expenses are covered by National PTA. Attendees are required to request approval to attend from the president and/or appropriate staff person.

Attendees funded by National PTA to attend National PTA sponsored events and non-National PTA sponsored events are required to attend all scheduled events. If attendee is unable to attend all scheduled events, written approval must be established by appropriate staff person 48 hours prior to event. Individuals without written approval will be invoiced or will not be reimbursed for the cost of any events and meals missed.

Registration/Housing

- Upon approval to attend or participate in a National PTA sponsored event, a Travel/Meetings tracking form will be forwarded, by the appropriate staff person, to the National PTA meetings department a minimum of 30 days prior to event.
- The Travel/Meetings tracking form must include all meeting details required, a 5-digit account code, and budget information in order to be processed. If any changes occur related to the event, the appropriate staff person is responsible for communicating these changes to all impacted internal and external parties, and for revising the Travel/Meetings tracking form.
- Upon selection of the meeting hotel/location, a meeting invitation detailing the registration/housing/travel instructions for the event will be forwarded by the meetings department to all approved attendees, National officers, accounting department, and official travel agency.
- For National PTA sponsored events where housing will be processed by the meetings department, the approved attendees are responsible for returning the appropriate forms to the meetings department by the established deadline.
- If the attendee does not return completed registration/housing materials to the meetings department by the established deadline, then a reservation will not be made for the attendee and the attendee will be responsible for making their own registration/housing arrangements.

- In the event an attendee must make their own housing arrangements, they will only be reimbursed an amount equal to the contracted room rate plus tax, if applicable.
- For National PTA sponsored events where housing will be processed by the meetings department, a housing confirmation will be sent directly to the attendee's email address on file with the National PTA.
- Attendee is responsible for examining the housing confirmation and contacting the meetings department in writing to request any corrections within 48 hours of receiving the confirmation before changes will be made. Changes to reservation received after 48 hours cannot be guaranteed.
- For National PTA sponsored events where housing will be paid for by National PTA, but the responsibility to reserve housing directly with the approved hotel lies with the individual, the deadlines established by National PTA and hotel policies will dictate appropriate procedures. All changes to reservations are the responsibility of the individual and must be communicated directly to the hotel.
- Only room and tax for meeting attendees on approved nights will be paid. Any fees related to reservation changes, or additional room nights booked, above approved room and tax charges, will be the sole responsibility of the individual. Attendees are responsible for all incidentals, late checkout or no-show fees as required by the hotel and will not be reimbursed.
- In cases where roommates are required for a National PTA sponsored event, individuals may select a roommate, or pay an additional room and tax fee to reserve a single occupancy room.
- Upon approval to attend or participate in a non-National PTA sponsored event the attendee shall complete and submit registration materials directly to the sponsoring organization/company. If a registration fee is required, the attendee shall forward completed registration form to the accounting department for payment processing.
- If housing arrangements are required at a non-National PTA sponsored event a request should be submitted to the accounting department along with registration documentation. Attendee is responsible for reserving their housing using the sponsored event housing instructions. Payment should be provided by corporate credit card or submitted for reimbursement after the event.

Air Travel

- The appropriate staff person will complete a Travel/Meetings tracking form and submit it to the meetings department before the traveler can book a ticket.
- All travelers are required to use the official travel agency, complete an online traveler profile, and are responsible for making their own airline reservations through the official travel agency. Reservations not made by the official travel agency will not be reimbursed by National PTA.
- At the time of booking, all travelers will be required to reference the 5-digit travel code provided in the meeting invitation by the meetings department. Reservations will not be made without the travel code. Upgrades will be made with an individual's travel perks only upon request at the time of booking. Travelers are advised to notify booking agent of any disabilities as defined by the American Disabilities Act (ADA).
- All travelers will be booked on the most economical round-trip coach airline fare available for approved travel. Any fares exceeding \$350 (excluding Alaska, Hawaii,

Virgin Islands, ECAPTS) will require official travel agency to contact meetings department for approval before booking.

- Airline reservations must be made a minimum of 21 days in advance of the departure date or the ticket will not be paid for (except in cases when the notification of travel is less than 21 days in advance). Airline reservations made less than 21 days in advance or after meeting invitation travel deadline may result in higher fares. If this occurs, the difference between fares is the responsibility of the individual traveler.
- If there is a savings of \$100 or more on a flight with a similar itinerary to the flight requested, the traveler must accept the lower fare flight or pay the difference in fare.
- If there is savings in airfare of at least \$200 by extending the stay over a Saturday night and the traveler's schedule allows, the reservation should be made to include Saturday night stay over and approved expenses.
- Early arrivals and late departures, if not part of the meeting schedule, must be approved by the meetings department prior to traveler confirming airline reservation.
- Reservations including personal travel as part of a ticket to a meeting must be paid in full by the individual traveler and must be booked with the official travel agency. The PTA portion should be claimed on the final expense form and must be accompanied by the original ticket receipt. The traveler is responsible for providing appropriate documentation to determine the difference between ticket purchased and what a straight round trip ticket would have cost.
- The traveler is responsible for examining their tickets and contacting the official travel agency to make any corrections within 24 hours of receiving their tickets, otherwise any increase in airfare will be the responsibility of the traveler. This does not apply if the sponsoring organization makes changes to the event schedule.
- The traveler must pay for any schedule or ticketing changes that incurs a penalty or results in higher airfare. This does not apply if the sponsoring organization makes changes to the event schedule.
- If a flight has been cancelled, the traveler must call the official travel agency as soon as possible to rebook the ticket. If a flight has been cancelled due to the cancellation of the event, National PTA will be responsible for all expenses related to flight cancellation and fees.
- If a ticket funded by National PTA must be cancelled or is unused due to a circumstance unique to the traveler, individual must contact the meetings department in writing to process cancellation immediately.
- If a traveler cancels a ticket and full credit cannot be applied to the National PTA travel account for future use by the individual or National PTA, the traveler will be responsible for repayment of cancelled or unused ticket and/or any and all cancellation fees, less any credits applied to National PTA travel account.

Travel Advance (for National PTA Staff Only)

- A request for a travel advance must be made on the National PTA Combined Travel Advance/Expense Form and received by the accounting department at least two weeks prior to the start of the event for which it is being used and may not be for less than \$100.00. Under no circumstances will a travel advance be given if there is an outstanding expense form or invoice.
- If the event for which the advance was received is cancelled, the advance cannot be used for a different event and must be returned in full to the National PTA accounting department within 10 business days of notification of event cancellation.

Expense Statement Reimbursement

In order for a reimbursement of expenses to be issued, a traveler's expense statement form and accompanying receipts must be postmarked or faxed to the accounting department no later than 30 days after the completion of the event. If an expense form is not filed within the 30 days, any reimbursements due the attendee will be forfeited and considered a donation to National PTA.

Per Diem: All official representatives at National PTA approved events will be reimbursed for meals, including tips, at \$40.00 per day (\$8.00 breakfast, \$12.00 lunch, \$20.00 dinner). Pre-planned meal functions included at an event will decrease the per diem accordingly. Per diem may not exceed \$40 per day per person.

Luggage Fees: National PTA will reimburse travelers (during PTA travel when travel expenses are covered by National PTA) for luggage fees pertaining to one (1) checked piece of luggage when required by the airline. Luggage fees related to weight restrictions and/or additional checked luggage, above the one (1) piece of luggage approved for reimbursement, will be the responsibility of the traveler.

Mileage: Personal automobile mileage will be reimbursed at \$.51 per mile (government standard) for approved travel not to exceed the cost of the most economical round-trip coach airfare 21 days prior to the event.

Preferred Method of Transportation: For events sponsored by National PTA, preferred method of transportation and instructions for travel will be included in meeting invitation by appropriate staff person. If attendee opts for a mode of transportation other than preferred method, they will only be reimbursed equivalent to the preferred method transportation rate.

Rental Car: Cars may be rented when another means of transportation is not viable. This could be when the final destination is more than a cab ride from the airport or when several stops are on the itinerary. Car rental is not allowable as a convenience in place of transportation recommended by the meetings department such as shuttle service to/from the airport.

National PTA has secondary insurance for car rentals; when renting a car accept the insurance offered by the rental agency or your personal auto insurance will carry the liability.

Staff must obtain permission in advance from the meetings department before renting a car.

Amended: October 2008