

GOAL Academy Travel Policy

Policy Name: GOAL Academy Travel Policy

Approval Authority: Chief Financial Officer (CFO)

Responsible Executive: Chief Financial Officer (CFO)

Responsible Office: Finance

Originally Issued: 5/2016, 6/2017, 8/2018

Revisions: 12/2023

1. Policy Statement

a. The GOAL Academy Travel Policy establishes guidelines for all GOAL employees and officers to follow when traveling on school business. It outlines procedures for travel authorization, obtaining advances, and reimbursement of travel expenses, while also defining the allowable rates for reimbursement.

2. Reason for Policy

a. This policy serves as a framework for GOAL employees who may need to travel or incur expenses for school-related purposes. It emphasizes that all expenses must directly correlate with the employee's role and responsibilities. Budgets for training, professional development, and travel are reviewed during the annual budget process, and travel and training requests must align with budget limitations.

3. Who Should Read this Policy

a. All members of the GOAL Academy Community.

4. Related Documents

- a. Travel Request Form (Portal)
- b. Conference Request Form (Vector)

5. Contacts

- a. Chief Financial Officer (CFO)
- b. Finance Generalist II

6. The Policy

Authorization for Travel/Processing and Documentation

For all travel, GOAL employees must obtain advance approval (14 days for in-state travel and 45 days for out-of-state or group events) before incurring any travel costs. Each employee must receive approval by completing the Request for Travel Form. After approval, the Finance Generalist II will generate the Travel Reimbursement form (TRF), allowing them to proceed with making travel arrangements.

Travel Processing and Documentation

- **Travel Request Form:** This form, available in the GOAL Portal, must be filled out with travel details (departure/return dates and times, etc.) and reviewed for accuracy before submission. It requires approval from your supervisor.

The Travel Request Form must also be used when requesting reimbursement for personal mileage (see Personal Vehicle).

- **Conference Attendance Request Form:** Found in Vector, this form, developed by the Professional Development Department, must be completed to request permission to attend conferences, whether virtual or in-person. Proper approval is needed before registration or travel plans are arranged (see Conference).
- **Approval Requests:** Employees are responsible for monitoring their travel submissions. Supervisors are asked to promptly approve requests (within 5 business days of submission) to ensure the adherence to travel timeframes mentioned above. Failure to process requests in a timely manner may result in the cancellation of travel plans.
- **Emergency Travel:** Approval for emergency travel will be considered on a case-by-case basis.

Meals while Traveling

Personal meals refer to meal expenses incurred by travelers during overnight out-of-town school business trips. **There will be no per diem for day travel.** Meals will be reimbursed at the published General Services Administration (GSA) rates, which include breakfast, lunch, dinner, and incidentals such as tips and gratuities.

Breakfast: Travel that begins before 7:00 AM

Lunch: Travel that begins before 12:00 PM

Dinner: Travel that begins before 6:00 PM on the first day of travel and/or ends after 6:00 PM on the last day of travel.

Per diem for meals should be requested in advance using the Travel Reimbursement form (TRF) generated by the Finance Generalist II. Receipts are not required when a per diem is paid. However, if meals are provided at a conference or event, per diem will not be paid for those meals. The same applies if the hotel or event provides meals. Per diem will be paid post-travel, and meal purchases must stay within the GSA per diem rate for the destination city.

Meals provided for Work Events

Event Type: Meals may be provided for specific work-related events, including but not limited to: Training sessions, GOAL Forum and Team building activities.

Meal Types: The type and nature of meals provided may vary depending on the event. These meals may include breakfast, lunch, dinner, or snacks.

Dietary Restrictions: GOAL will make reasonable efforts to accommodate dietary restrictions and preferences of employees. Please notify the event coordinator or organizer in advance if you have any specific dietary requirements.

To facilitate meal planning and allocation, employees may be required to RSVP or confirm their attendance for work events where meals will be provided. Attendance records will help to prevent waste and ensure enough food is purchased for attendees.

Contacts: For questions, concerns, or further information regarding meals provided during work events, please contact the HR Department.

Travel Transportation

- **GOAL Fleet Vehicles:** These are approved for local and in-state travel. They should be the first choice for transportation, and staff must reserve them for travel. GOAL Fleet Vehicles have WEX Cards for gasoline purchases. If a Fleet vehicle is unavailable, staff can request personal mileage (see Personal Vehicle)
- **Personal Vehicle:** Reimbursement for personal mileage must be pre-approved and will be paid at the allowable rate (GSA). Mileage is tracked using Google Maps and should only include travel to and from departure and return locations. Virtual employees at GOAL will receive personal mileage based on their home zip code to the destination site. Requests for personal mileage reimbursement must be submitted within a 30-day window following the trip. Utilize the mileage log for documenting multiple trips, as needed. **Personal auto insurance is primary when traveling in your own vehicle.**

- **Rental Cars:** When considering transportation options, commercial rental vehicles should be chosen only when more economical alternatives are not available. To arrange car rentals, please contact the Finance Generalist II. For cost-effective rentals, it is advisable to request subcompact or compact cars from reputable national auto rental agencies. It is important to note that most rental services do not accept third-party payments, so the employee will initially be responsible for payment. However, reimbursement will be provided upon submission of receipts after travel. Please decline insurance riders when renting a car, as all qualified GOAL employees are already covered by the school's umbrella policy. Rental vehicles should be operated by GOAL personnel only, and any gasoline purchases made with a personal card must be supported by receipts.
- **Shuttles/Taxis/Uber:** Whenever possible, plan and pre-pay for shuttle services for travel between airports, hotels, and venues. If not pre-paid, receipts are required for employee reimbursement, along with an explanation of the transportation used. Only expenses for official school business will be reimbursed, and personal use for sightseeing or shopping is not reimbursed.
- **Air Travel:** Travelers should request air travel as far in advance as possible, at least 30 days in advance, to secure the lowest airfare. Reservations should prioritize cost-effectiveness over frequent flyer incentives or memberships. The school will reimburse up to the cost of economy coach class. Special requests for upgrades or seating accommodation will be considered on a case-by-case basis and require documentation and approval. All flight reservations will be booked by the Finance Generalists II.
- **Baggage Fee:** Carry-on luggage is encouraged whenever possible. In cases requiring checked bags, employees may be reimbursed for one checked bag. Overweight baggage fees are not reimbursed. GOAL covers the cost of shipping materials needed for school business.
- **Parking:** At airports, employees should use long-term parking lots for economical rates. Valet parking is only allowed if it is the least expensive or the only option. Hotel parking for overnight stays is reimbursed. In urban areas, parking lots with receipts are preferred, prioritizing safety and proximity to the venue.
- **Tolls:** All GOAL Fleet vehicles are added to the state of Colorado's Express Toll account, with fees covered by GOAL. Employees using their own vehicles on toll roads may be reimbursed, but receipts must be submitted.
- **Tickets/Violations:** The school is not responsible for parking tickets or moving violations incurred while traveling on approved business. Employees are responsible for paying fines in such situations, which may affect their use of GOAL Fleet vehicles.

Hotels/Lodging

- Whenever possible, hotel/lodging arrangements should be made well in advance to take advantage of conference rates and special pricing. Hotel selection considers pricing, safety, and proximity to the venue. Employees should use prudent judgment when choosing accommodations.
- Lodging will be reimbursed for the minimum number of nights required for school business. Payment for hotels will be handled by the Finance Generalist II via Pcard or PO. Personal credit cards are required for incidentals.
- Additional nights for personal leisure must be arranged and paid for by the employee.
- Overnight stays will be determined based on travel times, conference/meeting start times, safety considerations, and weather conditions.

Conferences

Employees seeking to participate in free or GOAL-sponsored professional development opportunities, whether during work hours or outside of work hours, are required to complete a Conference Attendance Request form on Vector at least 60 days prior to the registration deadline. Supervisors must approve these requests at least 30 days before registration closes. The Learning and Development Department will collaborate with the Finance Department to obtain budgetary approval and to finalize registration and travel logistics.

Employees requesting conference attendance will receive confirmation of approval via email from the Learning and Development Department. Upon returning from the conference, employees will collaborate with the Learning and Development Department to share the knowledge and skills acquired during the event.

Special Group Events

Throughout the year, the school may organize special group events such as the GOAL Forum, Regional Meetings, and Training sessions. These events are considered unique and infrequent, typically involving the participation of 15 or more staff members. In the event of such activities, travel arrangements must be requested at least 45 days in advance due to the substantial time and effort required for planning and hotel accommodation arrangements.

Other Expenses

Any incidental travel expenses not explicitly addressed in this travel policy must be properly documented before reimbursement can be processed. Only expenses deemed reasonable and essential for business purposes will be eligible for reimbursement.

Disallowed Expenses

- Expenses that will not be eligible for reimbursement include, but are not limited to:
- Mileage reimbursement for commuting between an employee's home and their assigned GOAL Work Site.
- Special requests outside the scope of this policy.
- Expenses related to movies, liquor, bar costs, or other forms of entertainment.
- Costs incurred for non-business-related long-distance calls.
- Charges for excess baggage, unless pre-approved for business purposes.
- Participation expenses for golf, tennis, or sporting events.
- Expenses associated with companions or family members.
- Costs for travel insurance.
- Airfare seat upgrades that were not preapproved
- Charges for valet service.
- Fees resulting from avoidable airfare cancellations or "no-show" charges for hotel or car services.

Post-Travel Expense Reimbursement Procedure

After concluding travel, employees must contact the Finance Generalist II to provide all relevant receipts. The Finance Generalist II will carefully examine these receipts in collaboration with the traveler to ascertain the amount eligible for reimbursement. Subsequently, the Travel Reimbursement Form (TRF) will be forwarded to the traveler for their review before it is submitted to the payroll department for further processing. Note that there are two monthly submission windows for reimbursement processing. Traveler's must comply with the company's travel reimbursement policy and submit accurate and timely requests.