



Travel Policy

Concepts

1. As a not-for-profit organization, FIRST.Org, Inc. ("FIRST") recognizes the need to be fiscally prudent with its funds, while covering the value of travel expenses for conducting face-to-face meetings, provide training, represent FIRST and inviting key individuals to participate at events.
2. FIRST will administer a fair and equitable travel policy that enables it to conduct business while setting reasonable controls on expenses.
3. This policy applies to all travelers using FIRST funds, including but not limited to the Board of Directors, approved speakers and trainers, Fellowship participants and contractors.

Policy

1. Travel for FIRST business may be funded by FIRST, but must be authorized by the FIRST Board of Directors prior to travel authorization.
2. All FIRST funded travel will be reported to the FIRST membership as part of the annual report.
3. Individuals with authorization for travel may:
 1. Make travel arrangements, using whatever personal or business discounts are reasonably available at the time;
 2. Request reimbursement for reasonable expenses incurred prior to travel, such as airfare (as described below).
 3. If personal/business charges are incurred, all such charges will be submitted within 45 days after travel has taken place, for reimbursement. Exceptions may be approved by the CFO with notification to the Board
4. Class of service
 1. FIRST will reimburse Coach/Economy Class service (or equivalent) for all modes of transport;
 2. Individuals are allowed to use their own travel-class upgrade opportunities;
 3. Exceptions to Class of Service are authorized by the Board for hardship cases, health reasons, etc., on a case-by-case basis, prior to travel arrangements.
 4. Bookings should be made as far in advance as possible, so that the lowest available rates can be utilized.
 5. Non-refundable tickets are encouraged for scheduled FIRST activities, so that the lowest available rates can be utilized.

6. Travelers may choose their own airline and flight itinerary to optimize travel time, fewest connections, etc., towards the goal of overall cost reduction.
7. FIRST travelers are allowed to "double up" their FIRST travel with other business travel. In such cases, airfare can be shared on a pro-rated basis between the different expense categories.

5. Expenses

1. Reasonable reimbursable expenses include travel, ground transportation, hotel accommodations, network connectivity, and incidentals. The Board must explicitly approve all travel in advance and the CFO will approve all expenses.
2. Meal reimbursements will be handled on a per diem basis. The Board, on a city-by-city basis, will normally announce the per diem meal rate per day in advance in accordance with the rates on the US Department of State website for Non-US Travel or the US Department of Defense website:
 - US Per Diem Rates - <https://www.gsa.gov/travel/plan-book/per-diem-rates>
 - Non-US Per Diem Rates - https://aoprals.state.gov/web920/per_diem.asp
 - MI&E Breakdown: https://aoprals.state.gov/content.asp?content_id=114&menu_id=92
3. When attended events include meal service at no extra cost to the traveler, the traveler is encouraged to participate. In such cases, a pro-rated amount (see MI&E Breakdown above) should be subtracted from each day's per diem rate as appropriate. Similarly, when meals are paid by FIRST, the traveler must subtract the pro-rated per diem from their travel claim for reimbursement, as appropriate.
4. Day of travel is pro-rated at 75% of the total MI&E per diem rate
5. All other authorized travel expenses are reimbursed on an actual cost basis.

6. Reimbursement

1. All expense reports (see below) must be submitted to ap@first.org for approval by the fund director, and then by the FIRST CFO. The Chair must approve the CFO's expenses.
2. The fund Director verifies all expenses for conformance with the FIRST travel policy (this document) and recommends their approval to the CFO (or returns to traveler for modification and re-submittal until acceptable).
3. Travelers are reimbursed for approved expenses on a timely basis (approximately 14 days) after approval.
4. Expenses and reimbursements will generally be conducted in US Dollars, but other arrangements can be made at the discretion of the CFO. The CFO will use a generally accepted public source (e.g., Bloomberg.com) to determine the necessary currency exchange rates at the time of the travel.

7. Expense reports

1. All expenses are to be tracked and documented in a FIRST-approved format.
2. Each expense must be noted and adequately described. When expenses are shared among travelers (e.g., sharing a taxi to an airport), the expense should be thus noted.



3. Any expense of US\$25 or more will require a receipt in order to be reimbursed, *with the exception of meal per diem*. If no receipt is possible, the traveler must provide a thorough explanation and justification in the expense report with a missing receipt form.
4. Receipts will be scanned and submitted (electronically) with all expense reports.
8. The Board, on a case-by-case basis, may grant exceptions to this policy.