



FRATERNITY TRAVEL EXPENSE POLICY

PURPOSE

The purpose of the Travel Expense Policy is to assist with ensuring that proper business practices, procedures and protocols are followed within our organization. The Board of Governors are elected and charged with the general oversight and soundness of the Fraternity's financial condition. It is also each and every brother's personal responsibility to carry out and conduct the business of the Fraternity in a prudent and proper manner. The Board of Governors will issue certain policies and guidelines to assist in clarity, understanding and adherence to the appropriate execution of business operations within the Fraternity. Where appropriate, various other fraternal entities such as the Executive Office, the Finance Committee, and others may request additions to the Board of Governors' Policy Positions and/or may endorse items to provide further clarification and direction. The following policies are not necessarily designed to be all encompassing and complete but will be added to, and revised, on an ongoing basis to meet the ongoing needs of the Alpha Delta Phi Fraternity.

AIRFARE

Air travel must be made at the lowest possible fare, and the ticket booked at least 21 days prior to departure. The total cost of the ticket must not exceed \$400 unless prior approval has been granted by the President or his designee. If the total cost exceeds \$400, the Fraternity will only reimburse \$400. The lowest possible fare will not consider any fare which requires the traveler to leave their home before 6:00 AM nor arrive back at their home after 11:30 PM, although a traveler is free to consider those options if they wish. Any variation from this guideline must be approved in advance by the President or Executive Director.

The Fraternity requires each undergraduate brother to use TripEasy to book approved fraternity travel. Should undergraduates not make arrangements via TripEasy, reimbursement privileges may be restricted or denied.

Alumni brothers should watch for airline specials and to make early arrangements for known travel needs. It is each brother's personal responsibility to seek out the most economical means of travel.

Some commonly used travel websites (ie [Kayak.com](https://www.kayak.com)) do not show all available airlines (ie. Southwest) so it is the responsibility of each brother to do their research and find the best offer.

Documentation is required to be included for all travel with the timely filing of an expense reimbursement request to qualify for reimbursement.

CANCELLATIONS, CHANGE FEES & VOLUNTARY REBOOKING

Alpha Delta Phi understand that circumstances (ie. family emergencies, weather related delays, etc.) may arise that require brothers to cancel or make changes to their travel arrangements. Any flight change fees incurred after the plane ticket has been purchased will be the responsibility of the individual brother. Alpha Delta Phi will not reimburse any rebooking/change fees for any reason. Individuals that voluntarily cancel flights shall be responsible for all additional fees that relate to their pre-registered attendance at meetings, conventions, conferences, or leadership summits. Any flight that is voluntarily cancelled causing the individual brother to not attend a pre-registered meeting, convention or conference shall may not be reimbursed for the full cost of the flight. Reimbursement is at the discretion of the Board of Governors.

UPGRADES & ADD-ONS

While upgrades are tempting the common traveler, Alpha Delta Phi will not or approve or reimburse upgraded airline tickets. First class tickets are never allowed under any circumstance unless paid by the individual brother. All upgrades and airfare add-ons are the responsibility of the individual brother.

PRIVATELY OWNED & RENTAL AUTOMOBILES

Alpha Delta Phi offers \$0.20 per mile reimbursement unless additional reimbursement has been approved by the President or Executive Director. Rental cars are not an allowable expense for any undergraduate brother without the prior approval of the President or Executive Director. In the event that reimbursement for the cost of a rental car has been approved, the Fraternity will only reimburse the base cost of the automobile and assumes no liability for the operation of the motor vehicle.

AIRPORT/HOTEL PARKING

Alpha Delta Phi does not reimburse parking at airports unless the departure and return are on the same day. Parking fees at an airport are the responsibility of the individual brother. During hotel stays, valet parking will not be reimbursed in any circumstances. In cases where valet parking is the only available option, advance notice will be sent to attendees informing them of their nearby parking options.

LODGING

Brothers entitled to reimbursement will share a room with other equally entitled Brothers. In those cases where a Brother prefers to occupy a room alone, the cost of the room rate and tax will be the

responsibility of that Brother. Rooming assignments for events such as Convention and Leadership Summits will be coordinated by the Executive Office. In the event that a group hotel block is available, hotel rooms should be coordinated through the Executive Office to ensure group rates and discounts are being utilized. Lodging should be at the most economical locations consistent with safety and accessibility.

In the instance (with prior approval) that brothers are required to book their own lodging, transportation to and from any necessary airport should be duly considered both for the cost of the transportation to and from the airport and the time required to travel to or from the airport. Preference should be given to lodging that includes a shuttle to and from the airport when air travel is involved in the meeting. The Fraternity will not cover lodging expenses exceeding \$140 per night (+tax) without the prior approval of the President or the Executive Director.

MEALS

The cost of individual meals will generally not be reimbursed. However, it is recognized that various functions and meetings utilize working meals and breaks. If approved within the respective meeting's budget, the cost of such working meals can be approved by the President or Executive Director. Approved meals should be limited to those necessary for the efficient implementation of the meeting or event. No individual may exceed \$40 per day in the cost of their meals without prior approval by the President or Executive Director.

In the spirit of Alpha Delta Phi's Risk Management Policy, the Fraternity will not reimburse or pay for any alcoholic beverages without prior approval by the President or Executive Director.

COMBINING FRATERNITY & PERSONAL TRAVEL

At times a brother may wish to combine personal activities in connection with a Fraternity trip. The Fraternity accommodates such activity, provided that the related time and expense are paid by the individual, and the Fraternity's business objective for the travel is unaffected. In submitting the appropriate expense form, the brother is responsible for excluding all expenses of a personal nature. Appropriate documentation is also required in order to facilitate accurate processing.

TRAVEL ADVANCES

Travel advances (cash advances) are not permitted for Fraternity travel per this policy. Individuals (or chapters) are responsible for purchasing their own travel. Alpha Delta Phi does not purchase travel in advance for any reason.

LUGGAGE AND IN-FLIGHT PURCHASES

Alpha Delta Phi will not reimburse the cost of checked luggage since the duration of most meetings makes it feasible to fit three days of clothing into one carry-on suitcase and personal bag. The

Fraternity will not reimburse the cost of any in-flight purchases (ie. food/beverage, wifi, entertainment, etc.).

EXECUTIVE OFFICE STAFF TRAVEL

The travel expenses for members of the Executive Office Staff are the responsibility of the Executive Director and are subject to review by the Treasurer. Undergraduate chapter visitation for the regular staff is an expense of the Fraternity. However, chapters designated to receive additional discipline-related visits by staff may be required to bear the cost of such visits. In addition, special "need-based" visits, as requested by the Board of Governors or the Executive Committee, may be charged to the chapter visited. Such requests for this type of travel must be detailed in writing and made directly to the Executive Director in advance of the proposed visit. To limit the fraternity's costs, funding of travel outside of the annual chapter visit will be determined by the Board of Governors on a case-by-case basis.

BOARD OF GOVERNORS TRAVEL

The travel expenses for members of the Board of Governors are the responsibility of the individual member - board members do not receive any funding from the Fraternity. Board of Governors travel should be reported to the Executive Office as a "waived expense" within 30 days of the actual expenditure. The Executive Director shall record all waived expenses.

UNDERGRADUATE ADVISORY COUNCIL TRAVEL

Members of the Undergraduate Advisory Council (UAC) are eligible for travel reimbursement associated with one board meeting per calendar year (not including the convention). Lodging associated with the meeting will be provided by the Fraternity. All UAC members will be given room assignments with other UAC members. In the instance that UAC member prefer a single room (with no roommate) or a roommate who is a non-UAC member (ie guest), the cost of those accommodations will be the responsibility of the brother making such a request and will not be reimbursed by the Fraternity. Rooming assignments for the board meetings will be coordinated by the Executive Office. Alpha Delta Phi is not responsible for any incidental room charges or in-room purchases (ie. Room services, entertainment, wifi, etc).

TRAVELING FROM WITHIN 450 MILES OF THE UAC/BOG MEETING SITE:

If UAC members are traveling from or reside within six (6) hours or 450 miles from the meeting location, those brothers will be expected to traveling by car. Alpha Delta Phi will reimburse \$0.20 per mile for the attendee traveling by car (the driver). If the brothers chooses to pick up additional attendees along the way, the driver will receive \$0.05 additional per mile for each passenger. All mileage must be recorded and submitted after the meeting in order to receive his reimbursement. Upon arrival, Alpha Delta Phi will provide complementary parking at the hotel.

TRAVELING FROM OUTSIDE 450 MILES OF THE UAC/BOG MEETING SITE:

UAC members who are traveling from outside the 450 mile radius of the meeting site will need to arrange their own airline travel using the guidelines listed on page one of this policy. Transportation to/from your home airport is the responsibility will not be reimbursed - including parking at your home airport. Transportation to/from the airport and the convention hotel will be reimbursed by Alpha Delta Phi if no hotel shuttle exists. To ensure delegates are controlling their costs, public transit to/from the airport and the meeting hotel is preferred. Public transit fares will be eligible for reimbursement by the Fraternity.

ANNUAL CONVENTION TRAVEL

Official undergraduate delegate (one person per chapter) will receive reimbursement for their travel associated with the annual convention. Lodging associated with the meeting will be provided by the Fraternity. All delegates will be given room assignments with other delegates from another chapter. In the instance that delegates prefer a single room (with no roommate) or a roommate who is a non-delegate (ie alternate delegate from another chapter or their own chapter), the cost of those accommodations will be the responsibility of the brother making such a request and will not be reimbursed by the Fraternity. Rooming assignments for the Convention will be coordinated by the Executive Office. Alpha Delta Phi is not responsible for any incidental room charges or in-room purchases (ie. Room services, entertainment, wifi, etc).

Meals will generally be provided on-site during the meetings. Attendees must be present for the entire meeting to receive any reimbursement. Alumnus brothers, undergraduate non-delegate brothers, and members of the Board of Governors do not receive reimbursement for expenses incurred while attending the annual convention.

TRAVELING FROM WITHIN 450 MILES OF THE CONVENTION SITE:

If undergraduate delegates are traveling from or reside within six (6) hours or 450 miles from the convention location, those delegates will be expected to traveling by car. Alpha Delta Phi will reimburse \$0.20 per mile for the attendee traveling by car (the driver). If the brothers chooses to pick up additional attendees along the way, the driver will receive \$0.05 additional per mile for each passenger. All mileage must be recorded and submitted after the convention in order to receive his reimbursement. Upon arrival, Alpha Delta Phi will provide complementary parking at the hotel.

TRAVELING FROM OUTSIDE 450 MILES OF THE CONVENTION SITE:

Undergraduate delegates who are traveling from outside the 450 mile radius of the convention site will need to arrange their own airline travel using the guidelines listed on page one of this policy. Transportation to/from your home airport is the responsibility of the individual brother

and will not be reimbursed - including parking at your home airport. Transportation to/from the airport and the convention hotel will be reimbursed by Alpha Delta Phi if no hotel shuttle exists. To ensure delegates are controlling their costs, public transit to/from the airport and the convention hotel is preferred. Public transit fares will be eligible for reimbursement by the Fraternity.

LEADERSHIP SUMMIT TRAVEL

The mid-year Leadership Summit is a self-sustaining event meaning registration fees are included in the annual membership fees which are billed to each chapter in the early fall. Undergraduate chapters may select one person per chapter to attend who will receive reimbursement for their travel associated with the leadership summit. No additional fees will be charged to attend the Summit. Fees will include meals, special materials, and lodging for one person per chapter. The cost of travel for undergraduate brothers is reimbursable under the Fraternity travel policy if made 21 days in advance of the event. Attendees must be present for the entire meeting to receive any reimbursement.

Lodging associated with the meeting will be provided by the Fraternity. All brothers (one person per chapter) will be given room assignments with other brothers from another chapter. In the instance that attendees prefer a single room (with no roommate), the cost of those accommodations will be the responsibility of the brother making such a request and will not be reimbursed by the Fraternity. Rooming assignments for the Leadership Summit will be coordinated by the Executive Office. Alpha Delta Phi is not responsible for any incidental room charges or in-room purchases (ie. Room services, entertainment, wifi, etc).

Alumnus brothers, undergraduate non-delegate brothers, and members of the Board of Governors do not receive reimbursement for expenses incurred while attending the leadership summit.

TRAVELING FROM WITHIN 450 MILES OF THE SUMMIT SITE:

If undergraduate are traveling from or reside within six (6) hours or 450 miles from the summit location, those delegates will be expected to traveling by car. Alpha Delta Phi will reimburse \$0.20 per mile for the attendee traveling by car (the driver). If the brothers chooses to pick up additional attendees along the way, the driver will receive \$0.05 additional per mile for each passenger. All mileage must be recorded and submitted after the summit in order to receive his reimbursement. Upon arrival, Alpha Delta Phi will provide complementary parking at the hotel.

TRAVELING FROM OUTSIDE 450 MILES OF THE SUMMIT SITE:

Undergraduates who are traveling from outside the 450 mile radius of the summit site will need to arrange their own airline travel using the guidelines listed on page one of this policy. Transportation to/from your home airport is the responsibility will not be reimbursed - including parking at your home airport. Transportation to/from the airport and the summit hotel will be

reimbursed by Alpha Delta Phi if no hotel shuttle exists. To ensure delegates are controlling their costs, public transit to/from the airport and the summit hotel is preferred. Public transit fares will be eligible for reimbursement by the Fraternity.

TRAVEL REWARD POINTS/BENEFITS

Alpha Delta Phi allows individual brothers to keep and accrue their own reward points for airlines, rental cars (when approved) and hotels. In the event an individual traveling for the Fraternity decides to use their own frequent flyer miles or hotel points, the Fraternity will not be able to reimburse expenses based on the use of those rewards.

SITE SELECTION

Sites selected for committee or board meetings away from the Executive Office should be made only after comparability analysis of costs and expenses for all persons attending the meeting have been performed by the Executive Office. Consideration should be given to availability of special rates or hosted accommodations, as well as occurrences of Fraternity events at the meeting location. Event planners and Executive Office staff will consider if individual billing versus master accounts would provide the most economical payment arrangement for any particular meeting and group.

MECHANICS OF RENDERING REIMBURSEMENTS

Expense reimbursement requests should be timely submitted after each travel event and within 30 days of actual expenditure. All expense reimbursement requests are to be submitted to the Executive Director unless otherwise directed. Failure to submit receipts may result in requests being delayed or denied. Receipts for hotel and airline expenses must be attached in all cases. Should individuals not follow the expense guidelines, their reimbursement privileges may be restricted.

The expense reimbursement request forms have a column for listing total expenses, a column for amount of reimbursement being requested, and an opportunity to make a contribution to the 1832 Foundation or to the Fraternity (waived expense). Contributions to the 1832 Foundation are tax deductible and, as such, provide an opportunity to reduce your overall tax bill.

Undergraduate chapters will receive their reimbursement check within 60 days of the last business session of Convention and within 30 days after the last business session of the annual Leadership Summit. Reimbursement is based on good behavior and attendance at all previous business sessions. Reimbursement checks will be mailed to qualifying attendees.

Approved by the Board of Governors of the Alpha Delta Phi Fraternity on November 2, 2019.