



Travel and Reimbursement Policy

California Association for Institutional Research¹

Effective December 1, 2022

Purpose

To preserve CAIR's funds for mission critical initiatives by limiting costs for which CAIR directors are reimbursed in the course of executing their duties; to provide fair and appropriate reimbursement for costs incurred in the execution of CAIR's responsibilities.

Policy

CAIR will reimburse reasonable expenses incurred by CAIR directors in the execution of their role in the service of CAIR's mission. The Executive Committee of the board (by way of majority vote) holds the ultimate authority for determining which expenses are reimbursable, in consultation with this policy.

General Principles

Appropriate stewardship of CAIR's resources requires that CAIR directors minimize costs to the organization whenever possible. Naturally, certain expenses are unavoidable; however, CAIR directors should remember that the funds provided to CAIR ultimately come from institutions that are funded by students, their families, taxpayers, and other charitable giving. As a result, CAIR seeks to steward resources well in order to continue serving California's IR community in accordance with its mission. For this reason the least expensive travel option is always preferred, and at times, provides the maximum amount that will be reimbursed for a given cost. In all cases, preferred options, such as luxury upgrades and preferred seating are not reimbursable.

Expenses incurred for travel and lodging related to attendance at the annual conference and related board meeting are not reimbursable.

For travel to prospective conference sites by members of the site selection committee, to meetings of the board of directors, or other meetings or business that are a necessary part of conducting the business or promotion of the corporation (as determined by the executive committee), the Treasurer is authorized to reimburse reasonable expenses for which individual directors have submitted receipts, as specified below and CAIR's finance policy.

Travel Costs

Mileage

Mileage will be reimbursed for personal car use at the federal reimbursement rate at the time the mileage costs were incurred. Directors who choose not to request reimbursement can treat

¹ Last Updated by Board on Aug 22, 2022 . First approved by CAIR board Jan 28, 2011

the use of their cars for official CAIR business as a tax deductible charitable contribution on their personal income tax returns.

Parking

Parking expenses are fully reimbursable.

Mass Transit

Fares for riding local mass transit to or from transportation depots and to or from meeting locations are fully reimbursable. It is understood that receipts may not be available for these expenses. The treasurer is authorized to reimburse reasonable subway and bus expenses even if no receipt is submitted.

Long Distance Mass Transit

Air fare, train fare, bus fare and other such expenses are fully reimbursable. Luxury upgrades and preferred seating are not reimbursable. The least expensive travel arrangements in terms of airport location are reimbursable.

Shuttle Service

Shuttles between an airport, train station, or other depot and a meeting location are fully reimbursable, as is shuttle service between a director's home or office and the airport, train station, or other originating depot.

Taxi Service/App-Based Ride Sharing

Taxi and Ride sharing (Uber, Lyft, etc.) costs are only reimbursable for short trips when less expensive modes of travel are not viable options. The Executive Committee is authorized to determine what is viable.

Rental Car

When renting a car is less expensive than taking a shuttle or taxi, or less expensive than using a director's personal car, or when a car rental is required in the execution of a CAIR director's role (as determined by the Executive Committee) car rental expenses are fully reimbursable, including expenses for gas (though not mileage).

Lodging

For site visits, or when a director cannot attend a meeting without traveling to the meeting location the day before the meeting, the room charge and applicable taxes are fully reimbursable. Incidentals (e.g., movies, phone charges) are not reimbursable. CAIR will typically directly pay minimal lodging expenses for directors to attend meetings, or in the exercise of their roles as determined by the executive committee. Other room charges, with the exception of those outlined in this policy, are not reimbursable.

Meals

CAIR typically provides lunch at in-person board meetings. Expenses for reasonable food and drink costs incurred on travel days to and from meetings, on meeting days, or while conducting other business in the interest of the organization are reimbursable, up to \$75 per day.