

# BOISE REGIONAL REALTORS®

## 2023 TRAVEL POLICY AND EXPENSE REIMBURSEMENT PROCEDURES

Adopted February 2010: Amended 6/15/2023

*RULE OF THUMB: Use discretion and good judgement when making purchases while traveling on association business. If you would not normally spend whatever you are about to spend on an item/meal/etc., when traveling on your own, do not spend it when traveling on behalf of BRR (Boise Regional REALTORS®). We want you to have a wonderful time and enjoy yourself, in appreciation for the time you are taking away from your business and family, so no need to skimp, but please do not go nuts. ☺*

The following outlines reimbursable expenditures for those traveling on behalf of Boise Regional Realtors® (BRR). This policy was adopted by the Finance Committee in 2010, with minor revisions and notes since. This policy is designed to:

- Ensure compliance with minimum Internal Revenue Service (IRS) requirements.
- Ensure that those traveling are reimbursed on a fair and equitable basis.
- Avoid undue record keeping and reimbursement delays.

BRR will not reimburse expenses submitted not in compliance with IRS requirements or this Travel Policy. A memo will be attached to your reimbursement check indicating how much was not in compliance with instructions to resubmit any items to BRR's Director of Operations. If you feel there are exceptional circumstances, exceptions may be approved at the BRR Board of Director's discretion.

All reimbursement requests must be submitted on BRR's travel/expense reimbursement form within ten (10) calendar days of a completed, approved trip. Forms submitted after ten (10) calendar days may or may not be approved. Under no circumstance will expenses be reimbursed more than thirty (30) calendar days after completion of an approved trip.

Maximum travel reimbursement amount is determined annually by the Board of Directors through the budget approval process. Travel advances will be considered on a case-by-case basis and must be approved by the Chief Executive Officer. Such requests must be submitted in writing at least thirty (30) calendar days prior to the travel date, and if approved, a check will be issued at least seven (7) calendar days prior to the travel date and must be picked up at the BRR office. Should you have any questions regarding these procedures, please contact BRR's CEO (Chief Executive Officer).

### RECEIPTS

BRR will not reimburse any expenses over \$25.00 without the original receipt to accompany that expenditure, except ground transportation (i.e., tax, bus, airport limo). However, we strongly recommend that you retain receipts for all expenditures, regardless of dollar amount, to assist with accounting, reconciliation, and any audits, related to charges on BRR credit cards and reimbursements. Your original receipts must be submitted to BRR's CEO no later than ten (10) calendar days after the qualifying travel or expense took place.

- **AIR TRANSPORTATION:** BRR requires receipts for all baggage fees and any air transportation not booked through BRR's corporate travel agent.
- **LODGING:** BRR requires original receipts which include line-item expenditures and proof of payment.
- **MEALS AND GROUND TRANSPORTATION:** BRR requires original receipts for all expenditures over \$25.00, except ground transportation (i.e., taxi, bus, airport, rideshare, limo) without the original receipt to accompany that expenditure.
- **GUEST ENTERTAINMENT:** Reimbursable for current President and Chief Executive Officer *ONLY*.

## AIR TRANSPORTATION

BRR's Corporate travel agency should be used for all member air travel, and the airfare will be charged directly to BRR. In certain situations, the members may use their own personal credit cards for airfare. In these cases, the member must complete an expense report for reimbursement, **after business travel is completed.**

- Reservations are for coach class only.
- Purchase tickets a minimum of fourteen (14) calendar days prior, whenever possible.
- The person traveling is responsible for confirming all travel details made by BRR and/or our travel agent.
- Changes to travel arrangements after confirmation may be at the expense of the person traveling.
- Airline baggage fees are reimbursable up to \$100 per trip. *(Added 2016.)*

## LODGING

- Rooms will be booked at pre-approved conference hotels, if applicable.
- Incidentals are the traveler's responsibility and should be paid upon check out.
- Original receipts with proof of payment are required for reimbursement if not billed through BRR.
- Lodging within a 50-mile radius of Boise, Idaho is not eligible for reimbursement.
- It is the traveler's responsibility to confirm all travel details made by BRR and/or our travel agent.
- Changes to travel arrangements after confirmation may be at the expense of the traveler.

Should you need to cancel a hotel reservation, it is your responsibility to contact the CEO during BRR's business hours, or the hotel if after BRR's business hours, so that BRR is not charged a "no-show" fee. If a "no-show" fee is charged it may be at the expense of the traveler. *(Added 2018)*

## MEALS AND GROUND TRANSPORTATION

- Reasonable meal and daily ground transportation costs reimbursed up to \$150 per day; receipts to be provided. *(Updated 2017)*
- Airport Transfers (taxi, ride share, train, shuttle, etc.): Actual cost; receipts to be provided. *(Updated 2019)*
- Mileage: IRS allowable, not to exceed the cost of airfare. Intended to cover all costs associated with operating a personal vehicle for association purposes, including gas. *(Updated 2021)*
- Parking/Tolls: Actual cost; receipts to be provided, if possible.
- Rental Car: Consult BRR's CEO if you need to rent a car. Rental cars are reimbursable only when other methods of transportation are not obtainable. If car rental is necessary, the collision damage waiver must be purchased at the traveler's expense to ensure the traveler will not be liable for out-of-pocket expenses should an accident occur. Also, gas should be refilled prior to returning the vehicle, whenever possible. *(Updated 2021)*

Use discretion when choosing your method of transportation to and from the airport (i.e., in many cases, if you will be out of town for five (5) or more days, it might be less expensive to use a friend/family member or an airport shuttle versus parking your car at the airport). If you drive to an approved conference or meeting in lieu of flying, reimbursement will not be based on reasonable costs, but you will not be reimbursed for costs which exceed the applicable airfare.

## GUEST ENTERTAINMENT

- Reimbursable for current President and Chief Executive Officer *ONLY*, who will list guest names and company, along with the business purpose on their receipt and/or expense reimbursement form. Guests are considered other industry professionals or BRR members not budgeted for travel.
- Under no circumstances will BRR pay for travel costs, meals, conference fees, entertainment, etc., for spouses, partners, children, friends, etc., of travelers. If a spouse, partner, child, friend, etc., attends an event, meal, etc., the traveler must arrange to pay separately and will be reimbursed for only their portion of the expense. If this practice is not followed, BRR reserves the right to invoice travelers for any expenses incurred for a spouse, partner, child, friend, etc. *(Updated 2019)*

## TIPS

- The actual cost was up to \$2 per bag for skycap, door attendant, and bellman.
- Up to 15% for taxi, depending on distance and service. Up to 20% for dining.

## TELEPHONE

- Any BRR business calls are reimbursable.
- Personal calls are NOT reimbursable.
- Air-to-ground calls are NOT reimbursable.
- Reimbursable calls should be made from your cell phone, hotel phone, or a pay phone.

## PERSONAL TRAVEL

If you plan to include personal travel in conjunction with your business trip, please contact the CEO and/or our travel agent for assistance coordinating flights, and reimbursing BRR for any difference in the cost of a flight or other expenses. BRR *will not* reimburse any expenses related to personal travel (extra parking, meals, etc.). *NOTE: Personal entertainment (shopping, concert tickets, drinks with friends or family not associated with the event, etc.) is not reimbursable by BRR and should not be charged to a BRR credit card. (Added 2016)*

## REIMBURSABLE STATE AND NATIONAL ASSOCIATION MEETINGS

### EXECUTIVE COMMITTEE LEADER TRAVEL

*[Amended by Board vote 6/15/2023]*

Idaho REALTORS Business Meetings (Spring & Fall)

What: Airfare, Registration, Lodging, Per Diem, Mileage

Who: President, President Elect, Vice President, CEO, GAD (as needed)

NAR Annual Leadership Summit (Chicago)

What: Airfare, Registration, Lodging, Per Diem, Mileage

Who: President Elect & CEO

NAR Business Meetings (D.C. & Fall Convention)

What: Airfare, Registration, Lodging, Per Diem, Mileage

Who: President, President Elect, Vice President, BRR allotted NAR directors, CEO, GAD

BRR Allotted and Elected NAR Directors – BRR will reimburse travel expenses for BRR allotted and Elected NAR directors for NAR meetings in which the NAR Board meets. This will include travel according to this policy, up to four hotel nights. *[Amended 6/15/2023 by Board vote]*

Elected State Directors – BRR members elected to serve as state directors and who attend IR (Idaho REALTORS®) meetings outside of Boise may request up to \$250 per year using BRR's Travel/Expense Reimbursement Form to offset travel expenses. Additional reimbursements may be made at the BRR Board of Director's discretion. Reimbursements are made on a first-come, first-served basis and are not guaranteed. Travel costs and other expenses covered or reimbursed by IR or NAR (National Association of REALTORS®) will also not be reimbursed by BRR. *(Updated 2017)*

National Committee Members – BRR members who serve on national committees and attend NAR meetings may request up to \$500 per year using BRR's Travel/Expense Reimbursement Form, to offset travel expenses. Additional reimbursements may be made at the BRR Board of Director's discretion. Reimbursements are made on a first-come, first-served basis and are not guaranteed. Travel costs and other expenses covered or reimbursed by IR or NAR will also not be reimbursed by BRR. *(Updated 2017)*

### **ASSOCIATION CREDIT CARDS**

Some BRR staff use association credit cards for travel in addition to other business-related expenses or purchases. Some Board Officers use association credit cards for travel on behalf of the association as budgeted. The President is also allowed to use the association credit card for meetings and association-related entertaining (as budgeted). Credit cards are issued to the President-Elect and Vice President but are kept at BRR and given out before a trip, and then returned to BRR afterwards with all receipts. *(Added 2018)* Any items charged to a BRR credit card that do not follow these policies will be owed by the member to BRR, and could be placed on the member's account, unless otherwise approved by BRR's CEO or President.