



# Travel Reimbursement Policy

The Board of Directors of the Council of State Archivists (CoSA) established the following policy related to the reimbursement of travel expenses for CoSA members, staff, and others traveling in support of CoSA business. The policy is reviewed annually in preparation for the CoSA annual meeting or as needed. Any questions or concerns about this policy should be directed to [travel@statearchivists.org](mailto:travel@statearchivists.org).

## Annual Meetings

CoSA will reimburse expenses associated with state and territorial representatives' attendance at the organization's annual meeting according to the following criteria:

### 1. Eligibility for reimbursement.

- a. **Institutions.** CoSA annual meeting travel reimbursement is available as described below to those representing state or territorial member institutions paying dues at the [base dues amount](#) or more. Dues payment or a copy of a purchase order for dues payment must be received prior to the annual meeting. Representatives seeking reimbursement must attend both the CoSA Work Session and the CoSA Business Meeting during the annual meeting to be eligible to receive reimbursement. Exceptions to this requirement may be approved in advance by the CoSA Executive Committee.
- b. **Board.** When travel for a board member exceeds the allowable reimbursement amount, CoSA will reimburse allowable expenses from general funds. If a member of the CoSA Board of Directors is from a state or territory that is unable to pay at least the base dues amount, that individual may be reimbursed actual expenses from CoSA general funds. All board member travel is only reimbursable according to the general provisions of this policy, detailed below, and given attendance at all required meetings (CoSA Work Session, CoSA Business Meeting, CoSA Board Meeting(s)).
- c. **Award and Scholarship Recipients.** Recipients of CoSA awards and scholarships may be reimbursed for meeting expenses as detailed below and further stipulated in specific program guidelines.
- d. **Host Archives.** Eligible state or territorial archives located in the city or state/territory of the annual meeting may use the reimbursable amount for eligible expenses for any number of staff members, up to the allowable reimbursable amount. If your institution is eligible for this consideration, contact the Executive Director for further details.

### 2. Coverage.

- a. Reimbursements may be made to cover the expenses of one or more representatives of eligible state or territorial member institutions.
- b. The total reimbursement amount for actual expenses incurred by one or more representatives of eligible institutions may not exceed a maximum of 50 percent of paid dues at the base rate or higher by the state or territory. Instructions for coordinating reimbursements are in **Section 7. Submitting claims** so that requests received do not exceed the maximum allowable reimbursement.
- c. Eligible expenses include the following:
  - **Transportation** to and from the meeting in accord with the general provisions governing transportation, provided below;

- **Lodging** (not exceeding the advertised conference rate) in accord with the general provisions governing lodging, provided below;
  - **Meal expenses** in accord with the general provisions governing meals, provided below; and
  - **Registration fees.** CoSA's annual meeting is typically held in conjunction with the annual meeting of another organization. CoSA will arrange to allow representatives to register at the member rate of that partner organization, even if the CoSA representative is not a member of the other organization(s). Registration fees may be reimbursed as a benefit for those representatives of eligible organizations; however, the expense should be balanced against all anticipated travel costs. Should representatives opt out of full registration to the partner organization event, this may preclude full participation in receptions, meal functions, and any similar events other than the specific CoSA-led Work Session, Business Meeting, and meals.
- d. **Other expenses** may be approved in advance at the discretion of the Executive Director.
3. **Number of days allowed.** The number of days of lodging and meal expenses to be reimbursed will be determined in accordance with the general provisions for travel reimbursement as described below.
  4. **Booking reservations.** State and territorial representatives will book their own travel and request reimbursement following the meeting, unless otherwise arranged.

#### **Other travel by CoSA staff, officers, or other members**

CoSA will reimburse travel and lodging expenses for CoSA staff, officers, board members, and others who represent CoSA at meetings, conferences, and other business-related events according to the same general provisions as described below. Any travel by CoSA staff, officers, and other individuals that is not specifically included in the CoSA budget or in a grant project budget must be approved by the Executive Committee before booking travel.

#### **Provisions for CoSA travel reimbursement claims**

##### **1. Transportation**

As respectful stewards of our environment and the funds available to support our mission, all those engaged in travel for CoSA should consider the most responsible and economical combination of all travel costs listed below when making your travel arrangements. CoSA **does not** reimburse for upgrades from approved class of service/rate to a higher class of service/rate.

- a. **Airfare.** Air travel is reimbursed at the regular economy-class rate. While travelers should book the least expensive, commercial airfare from and to the most convenient airports, CoSA does not expect booking on ultra-low cost airlines or booking in "basic economy" ticket classifications. Premium economy or other categories of ticket fare must be pre-approved by CoSA prior to booking to be eligible for reimbursement. Other considerations:
  - Travel insurance is an eligible expense and will be reimbursed by CoSA.
  - Fees for checking one bag each way may be included in the reimbursement claim. Surcharges or penalties for overweight bags are the responsibility of the traveler.
  - Mileage earned and compensation for denied boarding awarded to the traveler while on CoSA business is the property of the traveler and may be used at the traveler's discretion.
- b. **Train or bus.** Recognizing the sustainability and practicality of ground transportation, tickets are reimbursed for coach/economy class prices. Business or other categories of ticket fare must be pre-approved.
- c. **Automobile.**

- **Personal vehicle.** Expenses for costs related to the use of a personal vehicle will be reimbursed at CoSA's then-current mileage reimbursement rate, typically aligned with the IRS standard mileage rate for business (as in effect on the date the travel occurred), for business miles driven. Mileage should be documented through the submission of a mapped route using a reliable source (e.g., Google Maps) submitted alongside other travel receipts.
  - **Rental car.** CoSA will reimburse economy or compact rental cars for travel between the traveler's home and the destination of the CoSA business. Requests for a larger car class in the case of several individuals sharing one vehicle must be pre-approved by CoSA. Actual costs of fuel or electric charging associated with the rental vehicle are eligible for reimbursement. CoSA **will not** reimburse for the cost of rental cars for use in the destination city unless the traveler has received approval from CoSA in advance of the trip.
- d. **Shuttle, metro/subway, taxi, rideshare, and local bus or train fares.** CoSA will reimburse the cost of travel to and from the airport at the points of origin and destination, including mileage for personal vehicles. CoSA will also reimburse taxi fare, rideshare, and/or public transportation while in the destination city if essential for CoSA-business purposes. CoSA strongly recommends that its members use public transportation, multi-rider rideshares, or shared shuttle services to the maximum extent possible while traveling on CoSA business as these support more sustainable travel and extend our financial resources to the fullest extent possible.
  - e. **Parking.** CoSA will reimburse for parking at the airport of origin if a personal automobile is used and for parking at the meeting site if travel by automobile is required. Eligible days for parking will be reflective of the length of CoSA-related travel, and charges for extended stays for personal business are not eligible for reimbursement.
  - f. **Other travel fees,** such as seat reservation costs or required health testing, may be reimbursed at the discretion of the Executive Director but could be the responsibility of the traveler.
2. **Lodging.** For those who are traveling from a distance that requires an overnight stay, CoSA will reimburse for lodging at the single-room or equivalent rate.
    - a. Lodging costs for additional night(s) will be reimbursed when a meeting's schedule makes it difficult for the traveler to reasonably arrive or depart the event, and/or when staying the extra night(s) results in savings on airfare that is greater than the additional food and lodging cost.
    - b. For meetings where CoSA or a joint meeting host has established a room rate or reserved a block of rooms at a particular hotel with which it has special rate arrangements, travelers wishing to stay elsewhere will be reimbursed only up to the rate negotiated with the designated hotel. No reimbursements will be made for transportation between the alternate lodging and established hotel meeting site.
    - c. Incidentals (e.g., premium internet, mini-bar, liquor, in-room movies, etc.) above the base room rate are the responsibility of the traveler and **will not** be reimbursed by CoSA.
  3. **Meals.**
    - a. CoSA will reimburse actual costs for the traveler's meals while attending the meeting and while in transit to and from the meeting site, up to the amount for a meal of the [General Services Administration \(GSA\) rate schedule](#) for the city in which the event is being held.
    - b. All meal expenses must be documented by itemized receipts, rather than credit card receipts. The total reimbursement will be for the actual amount spent and shall not exceed the currently allowable rates set for each meal by CoSA.
    - c. CoSA **does not** reimburse for alcoholic beverages.

- d. If CoSA or another organization, including the designated conference hotel, provides a meal in conjunction with the meeting (for example, complimentary breakfast), CoSA will not reimburse the traveler for an equivalent meal unless travel schedules preclude participation or the traveler has received pre-approval for an exception from CoSA.
4. **Tips.** CoSA will reimburse the cost of industry-standard tips for hotel housekeeping services, baggage handling, taxis, rideshares, and shuttles, and restaurant meals. Tips should be documented through provided receipts or those created following the instructions for receipts below.
5. **Other expenses.** Other travel-related expenses may be approved on a case-by-case basis if deemed essential to the conduct of CoSA business, e.g., shipping, meeting supplies, A/V equipment. Travelers should secure CoSA approval from the Executive Director for such expenses before incurring them. Receipts must be submitted for these incidental claims.
6. **Personal considerations.** If the traveler chooses to extend his/her trip for personal reasons, CoSA will not reimburse costs associated with extra lodging, transportation, or other expenses. The traveler should explain the circumstances in an email that transmits the reimbursement form. If the traveler is accompanied on a CoSA-funded trip by another individual, it is the responsibility of the traveler to determine the added cost for double occupancy and related expenses and to make the appropriate adjustment in the reimbursement request.
7. **Submitting claims.**
  - a. Claimants must submit all eligible expenses using CoSA's reimbursement form, available on [CoSA's Travel Reimbursement page](#) or upon request.
  - b. Reimbursement requests must be submitted electronically according to the instructions below.
  - c. All charges for each individual should be combined in a single reimbursement request for each event. If an eligible institution is requesting reimbursement for more than one individual, the State/Territorial Archivist or other designated individual should either 1) combine all eligible charges for a single reimbursement to the archive or 2) solicit reimbursement requests from the individuals within their organization and attach all requests to a single email.
  - d. **Receipts.**
    - Itemized receipts for all expenses listed on the reimbursement form are required. Electronic versions of all receipts should be combined in a single PDF for electronic submission.
    - On occasion, expenses may not generate a receipt (e.g., tips, bus fare, vending machines). If no receipt is provided or if receipts for eligible expenses are lost, reasonable and appropriate expenses may be claimed with a written statement included in the PDF with the other receipts. For meals, claimants should include a statement that no funds are being requested for alcoholic beverages. The option to approve the undocumented claim(s) rests with the Executive Director
  - e. **Members/individuals:**
    - Reimbursement claims shall be submitted within 30 days after the end of the meeting, conference, or event via email to CoSA at [travel@statearchivists.org](mailto:travel@statearchivists.org) or other designated individual for review and processing.
    - Individuals requiring both a personal and institutional reimbursement distribution should submit two separate forms for approval with the relevant information and related receipts.
    - The total amount of reimbursement may not exceed any limitations stipulated in this policy or previously approved budget restrictions (for example, travel funds covered by

grants).

- f. **CoSA staff/contractors:** Expenses placed on a CoSA assigned credit card shall abide by the terms of this policy. When travel expenses cannot be placed on a CoSA credit card (e.g., cash-only establishments), reimbursement requests should be submitted within 30 days after the end of travel. Travel for CoSA staff and contractors shall be submitted to the CoSA Executive Director or other designated individual for review and processing. Travel claims made for the CoSA Executive Director's own travel shall be submitted to the CoSA Treasurer for review and approval before processing.
- g. Any questions from members, individuals, contractors, or CoSA staff about the reimbursement process shall be referred to [travel@statearchivists.org](mailto:travel@statearchivists.org) to be addressed by the Executive Director or other designated individual.

### **CoSA Pre-Paid Travel**

In the instances where the CoSA office arranges and pays in advance for travel for board members, staff, consultants and/or program participants, the above policies for allowable expenses for transportation, lodging, meals, tips, other expenses, personal considerations, and receipts are in effect unless expressly noted in a separate policy or letter of agreement.

Individuals using CoSA pre-paid travel will be expected to abide by the following additional requirement and will be asked to acknowledge receipt of the policy and acceptance of its conditions.

#### **1. Cancellation Policy**

When CoSA prepays the travel, lodging and/or registration expenses for any individual's participation in a CoSA-sponsored program, cancellation prior to the program or withdrawal during the program will result in assessment of those costs to the individual or the individual's employer. Extenuating circumstances will be addressed on a case-by-case basis by the CoSA Executive Committee and/or Executive Director.

#### *Revision Schedule*

- *Policy adopted on June 10, 2009*
- *Revised July 21, 2010*
- *Revised April 2013*
- *Revised September 2015*
- *Revised December 2018*
- *Revised October 2019*
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