



Travel Reimbursement Policy

The Board of Directors of the Council of State Archivists established the following policy related to the reimbursement of travel expenses for CoSA members, staff, and others traveling in support of CoSA business. Policy revised October 2019.

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.** CoSA annual meeting travel reimbursement will be extended to one person per state or territory for each base amount (for 2020, \$2,750 is the base dues amount) that state or territory has paid in dues for the year in which the meeting will be held. Representatives will be expected to attend both the CoSA Work Session and the CoSA Business Meeting during the annual meeting to receive be eligible to receive reimbursement. Additional representatives from a state may be reimbursed for each additional base dues amount paid.
2. **Coverage.** For each eligible state and territorial representative, reimbursements are limited to actual expenses incurred, up to a maximum of 50 percent of base dues paid that year by the state or territory, for the following:
 - a. Transportation to and from the meeting in accord with the general provisions governing transportation, provided below;
 - b. Lodging (at the conference rate); and
 - c. Meal expenses as **documented by receipts** for each item claimed as a reimbursable amount, not to exceed the current CoSA allowable rate per meal, per day, generally the [General Services Administration \(GSA\) rate schedule](#) for the locale of the meeting. Actual expenses as noted on an itemized receipt are reimbursable, not the full GSA rate. The GSA rate is the upper limit that will be reimbursed.
3. **Number of days allowed.** The number of days of lodging and meal expenses to be reimbursed will be determined as follows:
 - a. For most state and territorial representatives who are eligible for reimbursement because of their dues status, CoSA will reimburse up to three days of lodging and meal expenses.
 - b. If the representative is unable to attend the CoSA Work Session and Business Meeting without spending an additional night at the hotel because of the distance from his/her home, CoSA will reimburse for four days instead of three.
 - c. If CoSA-related duties require representatives to spend one or more additional days at the meeting (e.g., board of directors or committee meetings to be held the day before the main meeting), CoSA will reimburse for the extra day(s).

- d. If a member of the CoSA Board of Directors is from a state or territory that is unable to pay at least \$2,750 in dues, s/he may be reimbursed for up to four travel days to attend both the board and annual meetings.
4. **Booking reservations.** State and territorial representatives will book their own travel and request reimbursement following the meeting. In exceptional and rare circumstances, CoSA may book flight reservations on behalf of a representative.
5. **Registration fees.** CoSA's annual meeting is typically held in conjunction with the annual meeting of another organization. CoSA will not cover meeting registration costs charged by other organizations, but, CoSA will arrange with the other organizations to allow state and territorial representatives to register at the member rate, even if the CoSA representative is not a member of the other organization(s). Failure to register will usually preclude CoSA representatives from attending receptions, meal functions, and any similar events other than the specific CoSA-led Work Session and Business Meeting.

Registration fees exceptions are allowable expenses in the following instances:

- 1) CoSA-Ancestry Leadership Award recipients and Victoria Irons Walch Leadership Travel Stipend Award recipients may be reimbursed for meeting registration fees. Also, the CoSA Board may allow registration fees to be a reimbursable expense in its other scholarships and awards programs. Applicants are advised to check each program's guidelines.
- 2) staff of the state archives in the host city/state where the annual meeting is being held may also be reimbursed for meeting registration fees. The state archives in the host city/state may use its reimbursable amount for registration fees 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.

Other travel by CoSA staff, Officers, or Other Members

CoSA will reimburse travel and lodging expenses for CoSA staff, officers, or board members, and others who represent CoSA at meetings, conferences, and other business-related events according to the same general provisions as used for annual meeting travel, described below. Any travel by CoSA staff, officers, and other individuals specifically included in the CoSA or in a grant project budget must be approved by the Executive Committee before booking travel.

Provisions for CoSA travel reimbursement claims

1. Transportation

Please consider the most economical combination of all travel costs listed below, including the total of airfare or other transportation, parking, and mileage, when making your travel arrangements.

- a. **Airfare.** Travelers should use the least expensive, commercial airfare in coach class from the most cost-effective airport(s) nearest the traveler's home or office to the most cost-effective airport (s) nearest the destination. Airline reservations should be made well in advance to obtain the optimum fare. 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. 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. **Automobile, train, or bus.** CoSA will reimburse expenses for these modes of travel to and from events if the total does not exceed the cost of airfare. Automobile expenses shall be reimbursed at CoSA's then-current mileage reimbursement rate. If the traveler chooses to travel using one of these methods, s/he shall document the cost of an advance-purchase round trip airplane ticket to the same destination and submit it along with his/her travel reimbursement claim.
 - c. **Shuttle, taxi, rideshare, personal automobile.** CoSA will reimburse the cost of travel to and from the airport at the points of origin and destination. CoSA will also reimburse taxi fare, rideshare, and public transportation while in the destination city if essential for business purposes. CoSA requests that its members use public transportation, rideshares, or shared shuttle services to the maximum extent possible while traveling on CoSA business. CoSA will not reimburse for the cost of rental cars in the destination city unless the traveler has received approval from CoSA in advance of the trip. CoSA also discourages single rider taxis or rideshares.
 - d. **Parking.** CoSA will reimburse for parking at the airport of origin if personal automobile is used and for parking at the meeting site if travel by automobile is required.
2. **Lodging.** CoSA will reimburse for lodging at the single-room rate for the same number of days as the length of the meeting or event, including night before and/or after if flight schedules make such extended stays necessary. CoSA **will not reimburse** for the cost of Internet charges incurred at the hotel or meeting site unless essential for CoSA business purposes, nor for in-room movies, liquor, bar costs, or similar personal or entertainment expenses. When lodging accommodations have been arranged by CoSA and the traveler elects to stay elsewhere, reimbursement will be made at an amount no higher than the rate negotiated by CoSA and no reimbursement will be made for transportation between the alternate lodging and meeting site.
 3. **Meals.** 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 of the GSA rate schedule for the city in which the event is being held. All meal expenses must be documented by actual 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. If CoSA or another organization provides a meal in conjunction with the meeting, the total reimbursement allowed for that day shall be reduced accordingly.
 4. **Tips.** CoSA will reimburse the cost of tips for hotel housekeeping services, baggage handling, taxis, rideshares, and shuttles, and restaurant meals.
 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 acquire CoSA approval for such expenses before incurring them. Receipts must be submitted for these incidental claims.
 6. **Receipts.** Claimants must include copies of receipts for all transportation (airline and train fare, taxis, rideshares, and airport shuttles), lodging, parking, and meals. Expenses that do not

typically generate receipts (e.g., tips, bus fare, vending machines) may be claimed without a receipt. If receipts are lost, reasonable and appropriate expenses may be claimed with a written addendum to the CoSA Reimbursement Form, but the option to approve the undocumented claim rests with the Executive Director under the direction of the CoSA Finance Committee.

- 7. 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.
- 8. Non-reimbursable expenses.** In addition to limitations described in above, CoSA will not reimburse travelers for the following:
 - a. Internet charges incurred at the hotel or meeting site unless essential for CoSA business purposes.
 - b. Hotel charges while on CoSA travel for in-room movies, liquor, bar costs, or similar personal or entertainment expenses.
 - c. Alcoholic beverages.
 - d. Upgrades in air travel from coach to business or first class.
- 9. Submitting claims.** Reimbursement claims shall be submitted to the CoSA Executive Director for review and processing within 30 days after the end of the meeting, conference or event. . If part of the reimbursement is to be paid to the individual and part to his/her employer, traveler should submit two separate forms, one for each reimbursement check. Travel claims made for the CoSA Executive Director's own travel shall be submitted to the CoSA Treasurer for review and approval before processing. Any questions about the reimbursement process shall be referred to the CoSA Finance Committee for resolution.

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, receipts, personal considerations, and non-reimbursable expenses 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, such as sickness or death, will be addressed on a case-by-case basis by the CoSA Executive Committee and/or Executive Director.