



Travel Policy and Procedures

Date of Policy Statement: November 2019

1. Introduction and General

This document establishes policies and procedures for staff, associates and board members traveling on behalf of Humentum, referred to as "travelers" in this policy. Questions regarding the travel policy not addressed in this document should be addressed to the Global Director, Finance and Administration.

The following policies apply to all travel undertaken on behalf of Humentum. Any deviations or required exceptions from the policies in this manual must be presented to the Global Director, Finance and Administration.

The objectives of the Travel Policies and Procedures are:

- to ensure all travelers have a clear and consistent understanding of policies and procedures for business travel incurred on behalf of Humentum;
- to provide measures to take to minimize risks to the traveler's safety and security;
- to provide business travelers with a reasonable level of service and comfort at a reasonable cost;
- to maximize the company's ability to negotiate discounted rates with preferred suppliers and reduce overall travel expenses.

1.1. Policy Review and Updates

The Global Director, Finance and Administration has primary responsibility for maintaining these policies and procedures. The policies and procedures will be reviewed annually and updated as needed.

1.2. Approval Responsibility

Enforcement of the travel policies is the responsibility of each manager.

All travelers must book trips well in advance of travel to obtain the best value for money. The traveler is responsible for complying with the travel policy. The budget holder approving the travel is responsible for verification of the following:

- Travel is required and will benefit the organization and/or its members/partners/clients.

- The trip is booked sufficiently in advance to obtain best value for money and adequate funds exist within the budget to cover the trip cost.
- The decision to travel has taken into account the carbon impact and considered other alternatives to travel.

Any employee traveling for a non-Humentum event or for business development purposes, that is one that is not paid for by a client or assigned by learning operations, must receive prior approval for travel, from their line manager regardless of budget availability.

1.3. Safety & Security

Travel creates a level of personal risk which Humentum recognizes and wishes to avoid by having duty of care standards that help to minimize the risks to employee health, safety and welfare always. This section addresses some of the risks of global travel and provides security measures that Humentum travelers are responsible to follow.

Most of Humentum's work takes place in cities in relatively stable countries. It is not expected that travelers will work in areas of civil or military unrest, though situations can change quickly, so it is important to always be aware and use caution. It is also possible that travelers will work with NGOs in emergency humanitarian responses. In these cases, in addition to following the policies below carefully, all travelers must inform themselves of the UN security arrangements and register with either the UN or the local government entity appropriate to their citizenship. at the earliest possible opportunity.

Humentum travelers are expected to abide by the following Safety and Security policies:

- Travelers must respect local laws, norms of behavior and religious differences. This includes informing themselves about recent local politics and current events before their trip. Trips during religious holidays should be avoided. When in doubt, Humentum traveler should err on the side of caution, modesty and safety and wear acceptable and appropriate clothing for the culture.
- Travelers must be informed of local security conditions before travelling outside of major cities. Resources include the UN, the local police, and local NGOs.
- Travelers must not travel by motor bike.
- In vehicles, drivers and passengers must always wear seat belts.
- Travelers must not undertake manual labor.

- Travelers should avoid being a target and limit exposure to theft, mugging and con artists by using the hotel safe or room safe, carrying a minimum amount of cash and concealing it in different places on their body, and wearing inexpensive jewelry.
- Travelers must inform their manager before departure of their travel itinerary including expected arrival times at destinations
- Travelers are advised to keep a spare electronic copy of their passport and travel tickets so they can be used as backup if necessary
- Travelers are advised to carry a phone with international calling capabilities and enough credit line to call internationally, and a charger with suitable adapter. Phones should be programmed with appropriate phone numbers of local contacts, designated headquarters traveler to reach in case of emergency, and local consulate.
- Travelers must contact their line manager upon arrival at their destination, return and regularly when overseas (in normal circumstances, at least once every other day). Traveler must contact their line manager as soon as possible in the event of any emergency.
- The traveler's line manager is responsible for contacting them with any urgent news or information while they are overseas.

Recommended resources include:

- Security training is available from the United Nations Department of Security at: <https://training.dss.un.org/user/register>
- www.cia.gov/library/publications/the-world-factbook/index.html
- Rough Guide books and online at: <https://www.roughguides.com/destinations/>
- Lonely Planet books and online at: <https://www.lonelyplanet.com/>
- Executive Planet – information on international business culture and etiquette www.executiveplanet.com
- Foreign and Commonwealth Office (FCO) in the UK at: <https://www.gov.uk/foreign-travel-advice>
- US State Department at: www.state.gov
- European Commission at: [http:// europa.eu/index_en.htm](http://europa.eu/index_en.htm)

2. Reservation Procedures

The traveler is responsible for booking their own travel, contacting one of Humentum's approved travel agents.

Key Travel: inspireteam2.us@keytravel.com

Diversity Travel: Reservations@diversitytravel.com

Exceptions to booking the trip through the approved travel agent may be made if a better fare can be obtained by the traveler him/herself, as is sometimes the case using the internet, but should be confirmed that the travel agent cannot price match. In all cases, prior approval before booking is required from the line manager, if staff, to agree to the travel and from the budget holder (if

different). If the booking is made through the internet by credit card the traveler is to seek reimbursement through an expense claim.

The traveler will make travel arrangements in a timely manner to obtain the least cost itinerary, two months prior to an event. Please contact the budget holder (being the event manager for Associates or Global Director, Finance & Administration for Board Members) to confirm travel bookings. Domestic travel should be booked 14-21 days in advance. Travelers are expected to use the lowest cost airfare, determined by the on-line booking tool or the travel agent, unless its selection would:

- Add an additional night out to an overseas trip and the cost of the overnight stay is more than the difference between the lowest cost and the next lowest cost flight.
- Mean two or more aircraft changes.
- Extend travel time by more than three hours (or on a trip of less than two hours the travel time is more than doubled).
- Require a transit time of more than four hours at an interchange point. (Although interchanges of less than one hour are not recommended on international flights)
- Contravene donor regulations by not using a certain carrier, such as Fly America.
- Not meet the business need for presence at a combination of venues and can only be met by a schedule.

There may be times when, due to uncertainty in other travel arrangements, a more flexible fare ticket is required to accommodate potential changes to the itinerary after it is ticketed. Therefore, the ability to cancel or change a ticket for a small fee before departure, must be considered when booking a flight. Humentum does not hold a separate insurance policy to cover flight cancellations.

2.1. Airline Class of Service

All air travel, with the below exceptions, must be in coach/economy class. Business class may be used under the following circumstances with prior approval as indicated:

- When the use of business-class accommodations is necessary to accommodate a disability or other special need. The disability or special need must be substantiated in writing by a competent medical authority, associated documentation on file in the Human Resources Department and prior authorization be obtained from the Global Director, Finance and Administration
- At the employee's personal expense or by redeeming frequent flyer mileage. This does not require prior approval.

2.2. Seat Assignments

Humentum will only pay for seat assignments, when the flight is over four hours and up to \$50 only. This does not apply to Economy Plus or Business Class.

2.3. Airline Frequent Flyer and Hotel Program Points

Travelers may retain frequent flyer and hotel program benefits. However, participation in these programs must not influence a flight or hotel selection which would result in additional cost to the company or limit the traveler from taking into consideration other travel and lodging requirements as defined in this policy.

2.4. Denied Boarding Compensation

Airlines occasionally offer free tickets or cash allowances to compensate travelers for delays and inconveniences due to overbooking, flight cancellations, changes of equipment, etc. Travelers may volunteer for denied boarding compensation only if the delay in their trip will not result in any interruption or loss of business and additional cost to the organization. The traveler may retain the boarding compensation acquired from these circumstances for their personal use.

2.5. Overnight Delays

Should an airline delay necessitate an overnight stay, the traveler must first attempt to secure complimentary lodging from the airline. If unsuccessful, the traveler may contact a Humentum approved travel agency for assistance in locating a hotel or procure their own lodging. The lodging rate must be in accordance with the lodging section of this manual. A lodging receipt must be presented with the reimbursement expense claim.

2.6. Cancellations and Unused Tickets

If a trip is called off, tickets must be canceled by the person who made the booking, either online or by calling the travel agent within a day of the trip being canceled. Any refunded amounts will be reused for business purposes or refunded to Humentum if the traveler was reimbursed for the ticket.

2.7. Lost Baggage

The ultimate responsibility for retrieving and compensating the traveler for lost baggage lies with the airlines. Humentum will not reimburse travelers for personal items lost while traveling on business. Company laptops are insured under corporate insurance. Personal laptops and other equipment are not insured by the company.

Travelers should take the following measures to minimize baggage losses:

- Carry valuables (e.g. jewelry, money, cameras, projectors, etc.) on board the aircraft.
- Do not pack a laptop or projector in checked baggage, always pack in carry-on bag. Carry important and/or confidential documents on board the aircraft.
- Clearly and securely tag luggage with name, address, email and phone number.
- Take a photo of checked bag(s) and itemize the contents of your bag, including receipts whenever possible. Keep luggage photos and the itemization in your carry-on luggage.
- Keep airline ticket, boarding passes and claim stubs in carry-on luggage.
- Retain baggage claim receipts for checked luggage.

Follow these procedures if your bag is lost on route:

- Before leaving the airport, complete a lost luggage report form with an airline representative in the baggage claim area.

- Inquire about reimbursement with the airline.

2.8. Lodging and Other Hotel Costs

Lodging will be booked directly for Humentum events. In other cases, the traveler will be responsible for booking their own lodging and accommodation, either through the designated travel agents or may be made if a better fare can be obtained by the traveler him/herself, as is sometimes the case using the internet. As with all trips, prior approval is required if booking directly before confirmation. When selecting a hotel, the following factors should be taken into consideration:

- Properties where Humentum or a member organization has a negotiated rate;
- Vicinity to the workshop venue or other place of work;
- Reasonableness of cost;
- Hotel and room comfort, including access to the internet and dining facilities;
- Safety and security.

The maximum lodging rate per night is USD 150. The maximum lodging rate does not include taxes. In some instances, a hotel within the maximum lodging rate may not be available, prior approval is required from the budget holder/event manager if exceeding the maximum lodging rate.

2.9. Hotel Cancellation Procedures

When booking lodging, note the hotel's cancellation policy. Humentum encourages always booking the rate that allows for cancellations. If there is a travel delay or cancellation that will result in forfeiture, the traveler must take all reasonable steps to notify the hotel of the change. Travelers will not be reimbursed for "no-show" charges if they are at fault and must refund the company for such charges paid by the company.

2.10. Hotel Payment Procedures

Where the hotel is arranged directly by Humentum or through the designated travel agent, this will be invoiced to Humentum. For expense incurred on a credit card (personal or corporate) travelers will make an expense reimbursement with receipts. No expense will be reimbursed for hotels without a receipt.

2.11. Lodging in a Private Residence/Airbnb

Travelers may stay in a private residence with family or friends while traveling on business. Travelers staying with family or friends are not eligible for any lodging reimbursement. Travelers may also use Airbnb if the booking is within the lodging rate per night per person. Travelers are advised to follow all safety procedures when booking with Airbnb.

2.12. Travel Plans and Itinerary

All travel itineraries should be given to the line manager or event manager prior to departure so that travelers can be contacted in case of emergency and to ensure for their safety and security.

3. Ground Transportation

3.1. To and From Airports

Travel to and from the airport and other points of entry, travelers are expected to use the least expensive method of transport unless choosing the least expensive method results in extending the trip by more than one hour. Where traveling to a remote country for a Humentum event or where the traveler will be carrying a large amount of materials, international airport transfers for arrival in the host country will be pre-booked.

3.2. Reimbursement for Personal Car Usage and Safe Driving

Travelers may use their own vehicle for business with prior line manager or event manager approval. Reimbursement for business usage of personal cars in the US is calculated at the current [US IRS mileage rate](#). Personal car usage outside of the United States will be reimbursed at the published rates by the tax authorities in each country.

When claiming mileage reimbursement, indicate the starting point, destination and the total number of miles. Travelers will not be reimbursed for gas or any repairs to a personal car.

The safety of all travelers and passengers are Humentum's primary concern. All roadway laws should be adhered to. Any breach of the following rules may result in a disciplinary action.

- Drivers and passengers must wear seat belts always.
- Do not drive while tired or otherwise physically compromised.
- Do not drive after the consumption of alcohol or any other drugs.
- Do not use a handheld mobile phone, including phones with microphones and earpieces. The phone should be switched off and messages taken when safely parked. Handheld phones must only be used for phone calls or texting when the vehicle is parked, and the engine turned off. This does not include, for example, being stationary at traffic lights, in a traffic jam or in slow moving traffic.
- Mobile phones with a safety approved hands-free car kit may be used with extreme caution while driving with the phone in the cradle. Keypad actions should be minimized by using presets for most commonly used numbers. Dialing full numbers must be restricted to when the vehicle is safely parked.
- Avoid calling other travelers when it is known or thought that they may also be driving.

Humentum will not accept responsibility for fines or convictions incurred while driving on business. Inform your manager immediately if you receive a ticket or conviction for driving under the influence which may result in disciplinary action.

4. Meals, Incidentals, and Other Expenses

4.1. Travel Expenses, General

Humentum will reimburse travelers for all reasonable and necessary expenses incurred while traveling on authorized company business as approved by your line manager or the event manager, supported by the budget holder and in line with the policies in this manual. The company assumes no obligation to reimburse travelers for expenses that are not in compliance with this policy or in the Terms of Reference detailing the travel expenses.

To make a claim for travel reimbursement:

- Complete and submit an expense reimbursement at the end of each trip or at least once per month if more than one trip in a month.
- Save all original receipts to submit as required with the expenses.
- Obtain authorization for payment from the appropriate manager.

4.2. Travel Meals and Incidentals

Meals are reimbursed by Humentum according to actual costs incurred on a cost conscience basis. Meal costs include food, taxes, and tip. Meal costs should not exceed the following amounts for Breakfast \$15, Lunch \$25 and Dinner \$35. Should the cost of a meal exceed the recommended rate, it may be approved with a note of explanation for the exception. Reimbursement may also be requested for a provided meal if the food provided or timing was insufficient to serve as a meal.

Personal incidental expenses such as business telephone calls, tips for hotel staff, or coffee/snacks are also paid by Humentum if they are deemed necessary. Laundry is acceptable if the time away exceeds seven days. Receipts are required to be submitted for all meal and incidental purchases and reimbursed through the usual procedures.

For expenditures under \$25, travelers must note the details of the expenditure if no receipt is obtained, see section 4.5. All expenditures above \$25 require a receipt for reimbursement.

Meals provided by Humentum, another host or client, or as part of room and board are not eligible for reimbursement.

4.3. Other Types of Reimbursable Expenses

Travelers may be reimbursed for miscellaneous expenses, if reasonable, when substantiated with receipts. Humentum will not reimburse expenses incurred for alcoholic drinks or discretionary gratuities.

Guidelines for reasonable reimbursable miscellaneous expenses:

- Air freight for business purposes
- Airline charges for one (1) checked bag for domestic travel and two (2) checked bags for international travel

- Excess baggage or excess weight for baggage used to carry business-related items. The traveler must have used the maximum number of free bags permitted on each flight or have received prior approval
- Business office expense (fax, copy services, etc.)
- Internet access for business purposes
- Parking and tolls
- Visa/Consulate fees
- Passport (when pages full due to 75% or more of Humentum travel causing early expiry)
- Vaccination fees, where needed for the required country of destination.

4.4. Reporting Expenses

Travelers must make a reasonable effort to submit an expense reimbursement claim no later than five days after completion of each trip. If there are extenuating circumstances making it impossible to complete the claim within this time, please notify the budget holder.

All reimbursable travel expenses for staff must be submitted through the expense reporting system and receive the necessary approvals. Reimbursement will be paid through payroll at the next payroll.

For Board Members the reimbursement invoice is to be used together with receipts. Associates should include expenses when invoicing for time and can use either the reimbursement invoice template or their own invoice template, provided the latter has the key invoice elements required. The Traveler will be reimbursed within 15 days of the date of the claim.

4.5. Documentation Requirements

Humentum's preference is for a receipt for reimbursement. However, if a receipt cannot be obtained, travelers can provide a note for any expenditure under \$25, with reimbursement at the approver's discretion. For all expenditure above \$25 a receipt is required for reimbursement.

Receipts must include the name of the vendor, location, date and dollar amount or local currency amount and any applicable taxes.

If the amount claimed for a transaction is different than the amount of the attached receipt, a written note explaining the difference must accompany the claim.

4.6. Travel Advances

Advances are available to travelers prior to trips, in accordance with the policy and procedures set out in the Finance Manual. No advances will be given to travelers who hold a corporate credit card.

The advance will be held as a personal liability for the traveler. The advance must be fully accounted for and supported by original receipts or repaid within five days of the end of the business trip. If not reconciled within 10 days, one warning will be given after which the full amount will be deducted from the employee's next paycheck or invoice for associates.

4.7. Converting Foreign Currencies

Cash expenditures in foreign currencies are converted into US dollars/UK pounds at the actual exchange rate. The rate shall be supported by receipts such as foreign currency exchange receipts or as found on Oanda.com for the corresponding travel dates. Expenses paid with a credit card will be reimbursed at the exchange rate on the billing statements.

4.8. Business Phone Calls While Traveling

Travelers are encouraged to make sure their personal phones work overseas in the event of an emergency. Travelers are encouraged to use WhatsApp for business calls if necessary and will be reimbursed at actual cost.

4.9. Personal Travel

Humentum allows travelers to combine personal and business travel. All personal travel costs are the responsibility of the traveler and shall be paid directly by the traveler. Vacation/Annual leave must be recorded for time spent on personal travel by staff.

The traveler must include information on dates of personal travel when booking the trip. If the personal travel extends the trip or causes a change in routing, the traveler must request price quotes with and without the personal travel. If the cost of travel is higher because of the personal travel, the traveler must arrange for payment of that portion directly with the designated travel agent.

4.10. Companion Travel

Companion travel may be booked directly and charged to a personal credit card. For Humentum event related travel, the manager must be informed of the companion traveler in advance. Humentum will not reimburse travel and entertainment expenses incurred by a spouse or other individuals accompanying a traveler on business. Any resulting additional hotel fees must be paid directly by the traveler.

4.11. Travel Medical Services

Humentum has a group annual travel insurance policy through Zurich which provides coverage for all staff, associates and Board Members during business travel. Coverage is not extended to family members or for private travel, including any trips taken before, during or after a Humentum assignment. European travelers traveling in Europe, must carry a valid EHIC (European Health Insurance Card).

The purchase of additional insurance for personal injury or death, such as flight insurance or personal accident insurance on rental cars are options, however, their purchase is not reimbursed by Humentum.

Travelers are responsible for identifying any vaccinations or medications needed for entry into the host country. Country specific vaccinations and required medications can be found through the [CDC](#). Humentum will reimburse for any vaccines or travel medications needed for the host country.

Travelers are encouraged to receive pre-travel consultations to ensure they are fully prepared for their trip. This can be accomplished through one's primary care physician, or Traveler's Medical Service: <http://www.travelersmedical.com/index.htm>.

Additional travel preparation resources:

- [GOV.UK - Travel Abroad](#)
- [World Health Organization - International Travel and Health](#)

4.12. International Travel Advisories

Prior to each trip, travelers must make a judgment about whether it is safe to travel to a specific destination. Various resources provide up-to-date travel risk information about countries and cities including the:

- [Department of State](#)
- [Foreign Office \(UK\) for overseas travel](#)
- [Relief Web](#)
- NGOs will also normally share their security briefings and assessments.

In the case of an active travel advisory in effect for a planned destination:

- Travelers planning to travel to destinations against advice must discuss the situation with the event manager who will discuss with the insurance company before departure.
- Travelers have the right not to travel to – or to curtail a trip to – any destination on the grounds of fear for their personal safety. Humentum will not censure any travelers for this decision.

5. Other Travel Information

5.1. Passports and Visas

Travelers should obtain a visa in advance when traveling internationally. The expiration date of a traveler's passport should be six months beyond the end of the planned trip. Humentum has a visa service available for use, as outlined below. Passport costs will be reimbursed only when the passport is more than 75% full of visas from Humentum travel and results in early renewal. Normal passport renewals will not be reimbursed.

5.2. Carrying Workshop Materials

From time to time, travelers will be asked by the Learning Operations Team to carry workshop materials on behalf of Humentum. Personal packing should consider these additional materials, and travelers should take care to avoid having overweight luggage. Specific carry-on and checked luggage guidelines should be checked for the appropriate airline prior to travel.

Travelers should reach out to Learning Operations Team if they have concerns about carrying certain materials.

5.3. Board Member Travel

Any travel by a member of Humentum Board's should be booked following the policies and procedures outlined above. Assistance if needed is to be provided by the Board Liaison. The budget holder for the Board expenditure is the Global Director, Finance and Administration. Reimbursement of any expenses should be sent to finance@humentum.org using the reimbursement invoice. Invoice to Humentum UK and UK address for UK Board Members and to Humentum US address for other Board Members.

5.4. Associates Travel

Any travel by an Associate should be booked following the policies and procedures outlined above. Assistance if needed is to be provided by the Event Manager. The budget holder for the Associate travel depends on the type of service provided and will be informed in the Terms of Reference issued to the associate for the assignment. Invoices for expense reimbursement should be sent to finance@humentum.org. Invoices are to be addressed to either Humentum or Humentum UK based on the assignment completed by the Associate, informed by the Associate contract.

5.5. Travelers' Pre-Departure Checklist

All travel must be approved prior to booking.

- Contact an approved travel agency to select flights and accommodation as required.
- Apply for visa with PVS International:
 - Visa applications may be completed electronically via PVS. Apply online at <http://www.pvsinternational.org/>. In the remarks box, please put "Bill to Humentum directly" at finance@humentum.org
- Ensure that insurance card and travelers' information is received prior to departure.
- Book accommodation if not already pre-booked by Humentum
- Check for required vaccinations or medications needed for travel through CDC.
- Update contact numbers, emergency medical information and family contact details with Human Resources.
- If using personal credit and debit cards alert appropriate bank(s) regarding upcoming travel to avoid holds being put on cards while overseas.
- For workshop-related travel, confer with Learning Operations Team regarding carrying workshop materials
- Download Skype and WhatsApp on computers and mobile devices.
- Non-exempt staff should review the *Compensation for Travel Time Policy* and ask Human Resources any questions regarding paid time while traveling.
- Check in to airline and obtain boarding pass, if necessary, 24 hours before departure or as directed by the airline.