



## **2025 AIA Leader and Volunteer Travel Policy**

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### Travel Introduction:

We have a unique opportunity, post-pandemic, to examine our travel and meeting policies & practices through a new lens. Now is the time to align our policy with AIA's values and strategic objectives and imperatives. We believe that we can increase the diversity of engaged member voices by being a more virtual association. We can best do this by providing a level playing field that offers opportunities for both in-person and entirely virtual meetings, therefore creating a more equitable, accessible leadership journey.

We will apply a values-based approach to travel. We will consider the benefits to AIA, to member value, and balance with climate and equity considerations. To that end, we will prioritize travel for fiduciary meetings to support effective management of the organization, AIA's flagship products, member education, and revenue-generating meetings and conferences. We will endeavor to hold committee, jury, and task force meetings during already-scheduled in-person events, such as the Conference on Architecture, Leadership Summit, Women's Leadership Summit, or affiliate meetings.

- Travel for partner meetings, such as MasterSpec Committee, AAH/ACHA SLS, NCARB Licensing Coordinators, Documents Committee, and sending volunteers and staff to other organization conferences to represent AIA, should also adhere as much as possible to AIA's climate goals. We strive for a reduction in this type of travel when it does not conflict with AIA's needs for representation.
- Whenever possible hold Knowledge Community Events, Knowledge Leadership Assembly (KLA), Council of Architecture Component Executives (CACE) Annual Meeting, Advocacy, Women's Leadership Summit (WLS) during Conference or as combined events each year in order to bring additional attendees to Conference, maximize networking and take advantage of contracted space and staff travel.
- Hold Board-level Committee Meetings together at the beginning of the year to support cross-planning, centralized priority sharing, limited staff travel and the establishment of a balanced approach to time demands on AIA leaders and members.
- Committee, jury, and task force meetings will be held in person no more than once per year, whenever possible holding them virtually. No more than one staff person will travel to attend an in-person committee meeting. Committees should use effective meeting design and pre-meeting education/preparation to shorten and make the most effective use of in-person meetings.
- Staff travel will be curtailed and will take advantage of the virtual platforms available to host AIA meetings and attend other organizations' meetings whenever possible. In-person meetings should be reserved for those meetings that truly are not at all effective in a virtual setting (i.e., sensitive negotiations/controversial topics or member networking benefiting more than one committee).
- Staff should travel to in-person continuing education (i.e., ASAE) events no more than once every two years.



### Carbon Offsets for AIA Business Travel

Recognizing the scale of AIA business travel and corresponding carbon emissions, as a further demonstration of AIA's commitment to the strategic priority of climate action for human and ecological health, AIA is instituting a two-fold reparative approach in 2025 instituting the following practices to reduce the impact of AIA's business travel on the environment:

- In partnership with employees, AIA will identify a climate focused nonprofit organization to make charitable contribution to in 2025.
- AIA is also investing in community tree planting.

AIA will assess future investments on a regular basis but for now the purchase of carbon offsets should stop for any AIA business travel.

Should you have questions regarding this document, please contact your project manager or Amy Medawar ([amymedawar@aia.org](mailto:amymedawar@aia.org)) for more information.

### Booking travel

AIA uses the software Concur for expense reimbursement processing. Concur is also the software used by AIA's travel agency, Ovation Corporate Travel, for booking flights.

If you plan to travel for your duties at AIA, **then you must have a Concur/Ovation account**. If you don't currently have one, complete the form [here](#) and the Finance & Administration team will set up an account for you. If you have questions, please contact Emma Mathews ([emmamathews@aia.org](mailto:emmamathews@aia.org)).

Using Concur/Ovation Travel to make your travel arrangements allows direct billing of your fare to AIA. Concur/Ovation has a "lowest price guarantee" which has some caveats. While we prefer that you use Concur/Ovation, occasionally you might be able to find a lower fare on one of the consolidators (i.e., Expedia, Priceline, Travelocity, etc.). We don't require that you spend time researching fares through other sites, however if you choose to shop around and find a lower fare than Concur/Ovation is offering, provide the specifics (airline, flight numbers, cities) to a Concur/Ovation agent ([aiatravel@ovationtravel.com](mailto:aiatravel@ovationtravel.com)), and they may be able to match it and bill directly to AIA. If they cannot match the fare, and there have been times where a consolidator might be able to offer a lower fare for some reason, please feel free to book the fare using your personal credit card.

HOWEVER, be aware that one of the advantages to booking through Concur/Ovation is the support they offer (i.e., the 1-800 numbers to call if your flights are delayed or cancelled, or you run into some other difficulty while traveling). You also must use your own credit card and document the expense for reimbursement through Concur/Ovation. For those who do require reimbursement, airfare charges must be documented in the Concur/Ovation expense report, and a photo or .pdf of



the original confirmed electronic airline ticket must be attached. (Note that if you are not using Concur/Ovation to book your travel, you must still adhere to the limitations of the AIA Travel Policy.)

### **How do I book my air travel through Concur/Ovation?**

There are two ways to book travel, online or by calling Concur/Ovation. AIA pays a fee to Concur/Ovation for each ticket that is purchased, and the fee for using the call center is substantially higher than that of the online tool, so we encourage you to use the [online booking tool](#) whenever possible. If the complexity of the travel requires speaking to an agent, then you certainly may do so.

#### *Concur/Ovation Corporate Travel Contact Information*

- |                               |  |
|-------------------------------|--|
| • Hours:                      | Weekdays – 9:00 a.m. – 8:00 p.m. EST   |
| • Web Access:                 | <a href="http://www.concursolutions.com">www.concursolutions.com</a>         |
| • Online Support:             | <a href="mailto:support@ovation.com">support@ovation.com</a>                 |
| • 24-hour toll-free number:   | 800-925-4055   |
| • Questions Regarding Travel: | <a href="mailto:AIAtravel@ovationtravel.com">AIAtravel@ovationtravel.com</a> |
| • AIA Liaison                 | Amy Medawar ( <a href="mailto:amymedawar@aia.org">amymedawar@aia.org</a> )   |

### Airfare approval policy

AIA's policy is that anyone traveling on AIA business reserve travel in the lowest available economy fare that allows for both carry-on luggage and seat assignments. You do not need to choose "basic economy" fares that do not allow for carry-ons. Airfares that exceed either \$750 total or are more than \$200 over the lowest available fare require AIA approval.

If the pricing appears logical (i.e., all the tickets going to the destination are pricing at about the same level), then the Meetings department will approve it. If it's higher than other options, or if it doesn't agree with AIA's travel policy for other reasons, approval from the Managing Director or VP in the department responsible for the program for which you are traveling is required. They may contact you for more information.

The travel policy for all AIA travelers (volunteers and staff) is the same, with the exception of the AIA president, first vice president, president-elect-elect, and the EVP/CEO. Please make your reservations as far in advance as you can, preferably at a 21-day or more advance fare.

### Baggage fees

Baggage fees are reimbursable for up to two (2) bags per trip, maximum \$60 per trip. You are encouraged to carry on whenever possible.



### Charging the ticket to an AIA account code

When booking online or through the Concur/Ovation call center, you *must* have a 9-digit Account Code (GL) to book travel that is directly charged to AIA. AIA's account codes look like this: DXXX-PXXXX. Your AIA staff project manager will provide you with the code to use **before** you arrange your travel.

### Coach class travel

All AIA travelers are expected to travel in coach class, and tickets must be booked and expensed at the lowest available airfare. Given the move of some airlines to basic economy fares that do not include seat assignments or carry-on luggage, AIA will allow individuals flying on AIA business to book an economy fare that allows for both seat assignments and carry-on privileges.

### Frequent flyer miles

AIA travelers may retain frequent flier program benefits. However, participation in these programs may not result in any incremental cost to the AIA beyond the lowest available airfare. AIA travelers should not book flights with a specific airline solely to accumulate frequent flyer miles; flights must be selected based on availability and lowest price.

### Unused refundable and non-refundable airline tickets

If you must cancel your travel plans, please call Concur/Ovation or the airline directly to cancel your ticket so that a portion of it can be used on a future flight. All unused/cancelled airline tickets are the responsibility of the traveler to track and reuse when possible.

To cancel non-refundable tickets, call Concur/Ovation or the airline. The credit will then go on file with the airline for your future AIA business use (travel credits can rarely be transferred). Usually, the ticket must be used within one year of purchase (pandemic cancellation rules may be more lenient depending on the circumstances and the airline). When you want to use the ticket, before you start your new ticket search, please be sure to let the agent know you have an unused ticket on file.

### Lodging

**\*Note that Concur/Ovation Travel is not to be used for reserving hotel rooms. Please direct questions to [meetings@aia.org](mailto:meetings@aia.org). \*\***

First, determine whether AIA has already secured your lodging. When in doubt, ask [meetings@aia.org](mailto:meetings@aia.org) or your project manager.

- Are you going to attend a conference of another group? Then stay at one of their official hotels if you can; they have negotiated special rates and like AIA, are obligated to the hotel for a minimum number of rooms.
- Are you just looking for a room or two? You can book yourself using the hotel website, or better yet, price-compare on consolidators like Travelocity or Hotels.Com.
- In all the above cases, you will be required to pay for your lodging and submit for reimbursement through Concur/Ovation. The exception to this is when you attend a meeting



in Washington, DC, as AIA has direct billing set up with several hotels close to the building. Your project manager will arrange for sleeping rooms. In this case, your project manager will let you know how you will be accommodated, so please contact them with questions.

In general, AIA will reimburse reasonable cost for lodging. Reasonable cost is determined by GSA per diem rates for the city to which you are traveling, and up to 15% over the government-approved rate to account for demand-driven increases to lodging rates. You must be pre-approved by your project manager before booking a hotel room.

You will need a credit card when you check into the hotel. Lodging charges are to be billed on your personal charge cards and reported in Concur. Before using a debit card for hotel charges, ask the hotel for their policy on withholding funds, and if possible, use a credit card. Remember that the hotel folio bill and a charge card receipt are **required** documentation for reimbursement of lodging expenses, so be sure to get one upon checkout.

#### Car rental

Car rental is only permitted when it is necessary for business purposes. AIA travelers are expected to utilize public transportation whenever possible, and cabs/Uber/Lyft if no public options are available. Car rental in lieu of personal vehicle use is not generally permitted.

All rentals should be for mid-size/standard cars or smaller, unless four or more people are traveling together. When renting a car for business purposes, AIA travelers are required to take the loss damage waiver offered by the rental agency. All car rental insurance claims should be directed to AIA Legal & Business Affairs office ([sarahadiutori@aia.org](mailto:sarahadiutori@aia.org)).

Refueling rental cars prior to returning them is required. Rental agencies often charge more than \$9 per gallon when you return a car that is not fully fueled.

Car rentals can be charged to your personal credit cards and must be documented on expense reports with the original car rental contract and proof of payment.

#### Other Transportation

Amtrak is a great option if you are going between cities on the east coast because it eliminates the need for expensive airport transfers. AIA Travelers are encouraged to book regular service, not Acela as the price is significantly higher for very little time gained. First Class travel is not permitted on Amtrak.

Personal cars for business travel may be used *only when other transportation is unavailable or uneconomical*. Do a cost comparison with flying or taking the train and determine what is least costly – and factor in your time as well (time is money). The use of personal cars for business when necessary will be reimbursed at the standard rate of mileage reimbursement determined by the **US General Services Administration**. This mileage allowance covers all auto costs (e.g., gasoline, repairs, insurance) other than parking and tolls.



Trips exceeding 250 miles roundtrip require proof that driving your personal car was more economical than flying or train must be pre-approved by your project manager, and before reimbursement will be made for mileage.

The cost of taxis to and from places of business, hotels, airports, or railroad stations in connection with business activities is reimbursable. Use of taxis is authorized only when more economical services (e.g., Uber/Lyft, hotel vans, shuttles) are not available. Receipts are required for all transportation expenses. When using Uber and Lyft, we ask that you be cognizant of surge pricing, and compare to the cost of taking alternative transportation.

Ultimately please keep all forms of transportation in mind when you are traveling – when possible, use a bus, train, or subway, particularly when traveling to and from the airport, when you have the time to do so. As befits an organization prioritizing climate action, the use of public transportation is encouraged whenever possible.

#### Meals

Personal meal expenses are those incurred by travelers when dining alone on an out-of-town business trip. Actual meal expenses will be reimbursed up to \$85 per day, and any remaining funds are not carried over to the next day. **Receipts are required for all meal expenses greater than \$25.** AIA travelers who dine together and receive one check (receipt) from the restaurant for the group should submit the expense on one voucher submitted by one person. If this expense is submitted for reimbursement through Concur, you must list all attendees, and will be able to allocate to different project codes if needed. It is often simpler to request separate checks so that each person must submit for reimbursement for their meal. Each person's reimbursable amount for this meal cannot exceed the daily limit of \$85 (and will be less if breakfast or lunch is also claimed).

Credit card receipts are the preferred form of documentation; therefore, AIA travelers should use their credit cards to pay for meal expenses whenever possible. The \$85 limit applies to all meals/food the traveler purchases for one day, regardless of whether paid by cash or personal credit card.

#### **What other expenses are reimbursable?**

The following incidental expenses, when directly related to business travel, are reimbursable:

#### Tipping

The following are recommended guidelines when tipping on business travel.

#### **Hotels**

- Housekeeping: \$1.00 – \$2.00 per day (It is recommended to tip daily, not at the end of your stay to ensure that the housekeeper who cleaned your room that day receives the tip).
- Bellman: \$1.00 – \$2.00 per bag
- Concierge (varies): This service is not typically tipped; giving directions is part of their job.



### **Transportation**

- Limousine Drivers: 15-20% of total fare
- Taxi drivers: 15-20% of total fare. The driver may be tipped extra if they handled luggage, unless a fee was added to the fare.
- Valet parking attendant: \$2.00, this is in addition to the valet charge.
- Garage attendants: \$1.00-\$2.00
- Shuttle Bus Drivers: 10-15% percent of the daily bill. The tip is dependent upon the hours worked and should be provided at the end of their shift.
- Skycap: \$1.00--\$3.00 per bag for curb side check in. This tip should not be mistaken for the curbside check-in fees that some airlines charge (and for which no tip is required).

### **Restaurant/Food & Beverage**

- Wait staff: 20% of bill, pre-tax.
- Buffet or take-out: 10 % of bill
- Bartenders: \$1 per drink or 15-20% of the bill
- Coat check: At your discretion if there is a fee, otherwise \$1.00 per item.

### **Other Reimbursable Expenses (receipts are required for all reimbursable expenses)**

- Baggage fees – please try to carry on or limit your checked bags to two (see above).
- Tolls
- Parking
- Room service, as part of \$85/day per diem for meals
- Currency conversion

### **NON-reimbursable expenses**

- Baby-sitting
- Country club dues
- The purchase of luggage
- Magazines or subscriptions
- Airline club dues
- Traffic fines
- In-room movies
- Barber/hairstylist
- Spa service
- Kennel fees or fees to pet-sit or transport your pet.
- Trip Insurance
- In-flight movies





#### Significant other/guest Travel and personal travel

Travel expenses for non-authorized AIA travelers are not reimbursable as a business expense. If an authorized AIA traveler is being accompanied by a non-authorized AIA employee/traveler and the AIA is providing travel arrangements (i.e., train or airline tickets) the AIA traveler should provide Concur/Ovation with a personal credit card number to be used to charge the non-business portion of the trip.

If an AIA traveler is combining a personal trip with a business trip, the AIA will pay the lesser of the business portion or the total cost of the airline ticket. All other expenses for personal travel are the sole responsibility of the AIA traveler.

#### Expense report processing

All travel expenses are to be reported through Concur software. Reimbursements are deposited directly into your account, similar to a paycheck direct deposit. Your Concur expense report will be electronically routed to the Managing Director of the department for which you are traveling and then to the accounting department. **Expenses must be reported within thirty (30) days of being incurred; no reimbursement will be made if the request is submitted more than ninety (90) days of being incurred.**

All expenses should have a receipt; all expenses over \$25 **must** have one. Personal expenses should not be a part of the expense report. A separate expense report must be used for each trip.

If you don't currently have a Concur account complete the form [here](#) and the Finance & Administration department will set up an account for you. If you have questions, please contact Emma Mathews ([emmamathews@aia.org](mailto:emmamathews@aia.org)).

AIA's travel reimbursement policies are reviewed and updated whenever necessary. The current travel policy is available from your program manager.

Any questions or concerns regarding expense reimbursement or processing your expense report should be directed to Tralischia Jones, Accounting ([tralischiajones@aia.org](mailto:tralischiajones@aia.org)).

#### Responsibilities: yours and AIA's

AIA travelers who incur travel and entertainment expenses are responsible for complying with this policy. Travelers submitting expenses that are not in compliance with this policy risk delayed, partial, or forfeited reimbursement. Cases of significant abuse may result in disciplinary action.

(updated February 13, 2024)