

ARRL Travel Policy

Purpose: The purpose of this ARRL Travel Policy is to guide travelers who are eligible and wish to claim reimbursement for travel expenses incurred while on ARRL business. Those eligible include ARRL Officers, Directors, Vice Directors, Section Managers, Section Staff Appointees, Technical Advisors, NTS Officials, QSL Bureau personnel, and HQ staff.

Action: This policy is a restatement of a policy adopted by the ARRL Board at its July 1972 meeting (Minute 11). It became effective upon adoption by the Board at its 1987 Annual Meeting (Minute 54) and has been amended from time to time.

Authorization for Reimbursement:

Officers - The President is granted authority to make travel commitments for himself/herself, ARRL Vice Presidents, Secretary, Treasurer, and the General Counsel. All travel by Officers to club meetings, hamfests, conventions, and similar events where the primary purpose is membership contact shall be coordinated and authorized by the President.

Directors - Travel within their Division is at the discretion of each Director. Travel to neighboring Divisions on official ARRL business shall be coordinated with advance notification to the Director of the Division being visited. Division budgets may be used for travel on official ARRL business to the Dayton Hamvention, extending stays at headquarters and making an additional trip annually to Headquarters for those Directors serving on committees that do not hold four meetings a year there.

Vice Directors - Travel within the Division shall be at the approval of the Director. The Director and the President in exceptional situations may approve travel to adjacent Divisions, usually when the Vice Director is traveling instead of and as the personal representative of his Director.

Directors and Vice Directors Attendance at Committee Meetings - A Director may charge to, and be reimbursed from, his Division budget for the travel expenses incurred for the Director's attendance to one Standing Committee meeting of which he is not a member once per budget year. This does not apply to Vice Directors. Attendance at other committee meetings as a non-committee member Board Guest may be charged to the committee budget only if such attendance is requested and approved by the respective committee chair in writing before the meeting.

Assistant Directors - On rare occasions, when a Director or Vice Director normally would represent the League at an event, but neither is able to do so, the Director may authorize the attendance, at ARRL expense, of an Assistant Director as long as the cost incurred does not exceed that of the Director or Vice Director attending the event. There is no provision for ARRL funding of travel by Assistant Directors for other purposes, such as Division cabinet meetings.

Field Organization - Travel by the Section manager and Section-level appointees is conducted by guidelines established by the Field Services Department, and always within the annual expense

budget for each Section. This expense allocation is arrived at based on the number of members in the Section, and the population density (the more sparsely populated Sections receiving more per member). The Section Manager is responsible for approving all travel by himself and his appointees, and for remaining within the annual allocation.

Technical Advisors - Technical Advisors are sometimes invited to make technical presentations at conventions, hamfests, and affiliated club meetings. For the expense to qualify for reimbursement, the advisor's appearance must be approved in advance by the Convention and Hamfest Coordinator at HQ.

QSL Bureau Personnel - Incoming QSL bureaus are permitted to send one person per year to a major convention or hamfest in the call area they serve, subject to approval, in advance, by the Field Services Manager. Approval is based upon the trip being a cost-effective way of communicating information on bureau services to its clients and potential clients, and upon the total expended for this purpose being within the amount appropriated by the Board.

Headquarters Staff - In consultation with the CEO, Department Managers are authorized to make commitments for themselves and their subordinates for "business" travel, provided that travel involving contact with Federal government officials must be approved in advance by the President, who must also be advised in advance of travel to the Washington, DC, vicinity.

Member contact travel (i.e., travel to conventions, hamfests, and club meetings, as well as travel to events of general public interest designed to promote facets of Amateur Radio), is coordinated by, and subject to the advance approval of, the Convention and Hamfest Coordinator. In addition, any member contact travel is subject to advance approval by the Division Director concerned. (See Standing Order No. 132.) This approval is sometimes provided on a blanket basis, on the understanding that the Director is to be notified in advance of such travel. Member contact travel by more than one member of the ARRL staff at ARRL expense must be approved in advance by the President and CEO, and those staff members shall only attend with the prior consent of the Division Director; see Standing Order 96-3.66. Staff may not commit to any Member Contact travel independently without coordinating with the appropriate person in Field Services Department and the CEO.

Qualifying Expenses:

Transportation:

ARRL Volunteer Officials - Normally, at least two week advance purchase, non-cancellation "coach" or "economy" fare with seat assignment accommodations should be utilized when traveling by air. The President if practical will approve exceptions to this policy in advance.

If travel is by personal vehicle, the travel will be reimbursed at the then current rate per mile approved by the IRS. Reimbursement in this case will not exceed the normal and reasonable cost of airfare to the qualifying event or destination. Travelers are also strongly urged to investigate the cost of renting a vehicle for trips involving driving as this may be less expensive than the overall mileage reimbursement.

International Travel: - for trips that include international flights (not including travel between the US and Canada, or between the US mainland and Alaska or Hawaii) of six or more hours duration, the use of Business Class as well as Coach accommodations are authorized with the approval of the President and the expense, therefore, will be reimbursed. (Minute 11; 7/18/91 A&F Meeting)

ARRL Employees - While distance involved is a factor, for a trip of any length, the quickest means of travel is usually by air. This is generally less expensive and saves personnel time. Normally, the traveler is expected to use at least two week advance purchase, non-cancellation "coach" or "economy" fare class accommodations. The CEO or CFO must approve exceptions to this policy in advance. If used, the traveler will pay any difference between upgrade and coach class accommodations.

Travel by automobile, at the option of the traveler, is permissible under certain circumstances. One is where air or rail schedules are inadequate. Another is where the traveler has a collection of equipment to carry with them and a baggage problem exists. These normally will be short-distance trips - e.g., within the New England and Hudson Divisions, and possibly portions of the Atlantic Division.

On a longer trip, an individual may elect to use their automobile, purely as a personal convenience, providing that the cost to the ARRL both in transportation reimbursement and loss of time does not exceed the comparable cost of air or rail travel for which it is substituted. This paragraph is not intended to discourage a combined ARRL trip and vacation, but only to set up a dividing line between the two. The use of a personal automobile on an extended trip must be authorized in advance by the CEO or CFO.

Reimbursement: Reimbursement will be made for all reasonable out-of-pocket expenditures necessary for the trip. Personal items, of course, are not chargeable.

In no case shall the private-vehicle travel expense plus meals, and lodging costs exceed the round-trip "coach class" air transportation on trips where the traveler has the option of flying versus driving.

No expenses are reimbursable for attendance at an Amateur Radio gathering if the attendance was in whole, or in part, for personal gain.

The following guidelines are established to ensure that all ARRL official business travel is in accordance with various IRS Rules and Regulations. They apply to Officers, Directors, Vice Directors, employees, and all other officials traveling on official ARRL business.

1. Travel and lodging expenses will be reimbursed for the day preceding the meeting, the days of the meeting, and the day following official meetings. Other times will be considered personal and will be billed to the traveler.
2. Except under unusual circumstances, room service will not be reimbursed.
3. Expenses of spouses accompanying the traveler will not be reimbursed or charged to the ARRL unless the spouse is actively involved with the meeting. Room rate differentials and meals for spouses should be identified on Travel Expense Reimbursement Forms as

personal and deducted from amounts requested for reimbursement. Transportation expenses of spouses are not reimbursable.

ARRL welcomes and encourages participation by members with physical disabilities, and, wherever necessary to permit participation by its officials will hold committee and Board meetings in locations that are handicapped accessible. Extraordinary expenses associated with such travel and participation shall be the responsibility of the individual official.

The following statement of travel policy was adopted at the 1989 Annual Meeting, minute 41 for inclusion in the Director's Workbook and in the material sent to all candidates.

"No attempt should be made to discourage the Director from properly discharging his responsibilities to the membership simply because an election is in progress. At the same time, it must be clearly understood that a Director must take special care to avoid impropriety or the appearance of impropriety in ARRL related travel. If the purpose of the trip is to campaign for office, the traveler is not eligible for reimbursement for the trip from ARRL funds. If the purpose is a legitimate appearance in their role as Director, at an ARRL forum, club meeting, or the like, the Director may receive reimbursement provided that a discussion of the election is not the purpose of the meeting. If a Director is invited to appear solely because he is a candidate, no reimbursement may be claimed."

Entertainment: An ARRL official or employee visiting a radio club is customarily treated as a guest; discretion should be exercised in accepting such hospitality. While entertainment expense is a common practice in business when courting customers, such is not appropriate with a non-profit organization such as ARRL. Except in unusual circumstances, ARRL officials and employees should not incur entertainment expenses. Deviations will be documented with who, what, when, where, and why, or the expense will not be reimbursed.

Spouses: Ordinarily, when a spouse of an ARRL official or employee accompanies them on a trip, there will be no reimbursement of any of their expenses. The exception is in the case of a convention, hamfest, or meeting when they actively participate, in which case, meals, lodging, and registration costs are reimbursable. Hotel accommodations and meals for non-convention stops, such as club visits, are not normally chargeable for them, and necessary adjustments in hotel bills will be made. Lodging adjustments will be made based on single versus double occupancy.

Convention tickets: Complimentary registration and admissions may be accepted if offered but should not be solicited. Prize stubs shall not be deposited for drawing at conventions, hamfests, or club meetings to avoid embarrassment.

Insurance: ARRL has a travel accident policy covering ARRL officials and employees while engaged in travel for ARRL affairs, with a maximum death benefit of \$100,000. Any additional insurance purchased by a traveler for a specific trip is at their option and expense.

Internal Revenue Service: Detailed records are required to support all items of reimbursement. Business purpose, date, places, participants, etc. must be documented. All ARRL officials and

employees must use the ARRL Travel expense form when requesting travel expense reimbursement. The Chief Financial Officer will reject all claims not submitted on that form.

Division Administrative Expenses: The normal and reasonable cost of expenditures that are incurred directly in carrying out the responsibilities of the Director or Vice Director will be reimbursed. This includes items such as phone calls, postage, supplies (e.g. ARRL callsign/name badges, business cards, plaques), and the like. Given the proliferation of electronic communications, the organization will not reimburse the cost of printing and mailing Division newsletters. Directors are encouraged to communicate with the members through the use of e-mail, Division web pages, etc.

Documentation: All expenditures for lodging must be supported by a copy of the receipt attached to the expense reimbursement form. A receipt must also be submitted to support any individual expenditure exceeding \$25.

Submission of Travel Expense Forms: Travel Expense Forms should be completed within 30 days but in no case more than 90 days after incurring the expense. Expenses submitted after this timeframe may not be reimbursed. In order to close the financial books each year, all reimbursement requests must be received by the CFO no later than the 5th of January each year.

Travel Expense Forms must be approved by the following:

Officers	By the President or, on delegated authority, the CEO or CFO
Directors	By the CEO or CFO
Vice Directors	The Director and CEO or CFO
Section Managers	Field Service Manager or designee
Affiliated Club Coordinators	Section Manager
Assistant Section Managers	Section Manager
Bulletin Managers	Section Manager
Public Info Coordinators	Section Manager
State Government Liaison	Section Manager
Section Emergency Coordinator	Section Manager
Section Traffic Managers	Section Manager
Technical Coordinators	Section Manager
Technical Advisors	Convention and Hamfest Coordinator
NTS Officials	Field Services Manager
QSL Bureau Personnel	Field Services Manager

ARRL employees

The appropriate Manager is responsible for the staff member involved in the travel reimbursement.

All travel expense forms will be reviewed periodically by the Administration and Finance Committee.

Examples of non-reimbursable expenses:

- 1) Travel insurance or refundable airfare ticket.
- 2) In “air” or “on-board” internet access.
- 3) Personal care items like shampoo, aspirin, etc.
- 4) Room service.
- 5) Excessive mileage, ride-hailing apps such as Uber, Lyft, etc., and travel to and from restaurants, hotels, or business sites.
- 6) Costs related to pets or care of home while traveling.