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# IPA Global Travel Manual

for international travel and U.S. domestic travel

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# IPA Global Travel Policy

## 1. Purpose & Scope

- 1.1. Employees of IPA travel frequently and it is the goal of IPA to ensure that travelers travel safely, in compliance with donor and client requirements, and at reasonable cost.
- 1.2. The purpose of this travel policy is to provide a comprehensive statement of IPA's policies for international travel and domestic U.S. travel managed by or made by IPA for business purposes and to describe the systems, logistics, and documentation that accompany this policy.
- 1.3. Not all parts of this policy may apply to IPA Country Offices; specifically, sections on travel expenses, travel advances, and per diem may not apply to in-country travel and international travel funded by a Country Office or funding agreements managed by the Country Office. Travelers whose in-country travel or international travel is funded by a Country Office or by funding agreements managed by the Country Office should consult the Country Office's travel policies or the funding agreement.

## 2. Applicability

- 2.1. This travel policy and accompanying procedures apply to all IPA staff that travel domestically within the U.S. or internationally, any employee whose travel (international or domestic) is funded through Overhead or Unrestricted, and to U.S.-paid IPA employees that seek reimbursement of travel expenses from IPA Global Finance. This travel policy and accompanying procedures also applies to non-employees who travel for the purpose of IPA business, which may include consultants, Principal Investigators (PIs), and student volunteers.
- 2.2. This travel policy does not supersede policies related to travel allowances for relocation of international staff (U.S.-paid expatriate or third country national (TCN)) based internationally which are described in the IPA Employee Handbook or other Global Human Resource policies.
- 2.3. Travel funded by a Country Office or by a project follows the travel expense policies of the Country Office and/or project funding the travel, which must be equivalent to or more restrictive than the policies set forth in this Global Travel Manual. Similarly, travelers seeking reimbursement of travel expenses by a Country Office must follow the office's process for travel expense reimbursement.

## 3. Roles & Responsibilities

- 3.1. All IPA travelers are responsible for complying with the applicable policies and procedures in this Global Travel Manual. In this policy the use of the word "traveler" refers to IPA employees and independent consultants (ICs), Principal Investigators (PIs), interns, volunteers, or other non-employees traveling on behalf of IPA; whereas the use of the word "employee" refers uniquely to IPA employees.
- 3.2. Assignment Supervisors are responsible for ensuring that travel, including airfare and advances, is approved prior to travel. Assignment Supervisors are also responsible for ensuring that travel expenditures related to the trip meet the criteria described in this manual and that required documentation is submitted to support those expenses. The Assignment Supervisor is an individual with administrative and budgetary oversight of the assignment and may be the

employee's direct supervisor or the budget-holder of the Country Office or project that the traveler will support.

- 3.3. IPA's contracted Travel Agency is responsible for ensuring the lowest fare class that best meets assignment needs for all bookings while remaining in compliance with IPA travel requirements and U.S. Government travel regulations where applicable, including ensuring reasonable prices.
- 3.4. The Global Operations team is responsible for management of IPA's relationship with the contracted travel agency. Global Operations is also responsible for establishing and updating IPA travel policies in conjunction with internal stakeholders, overseeing IPA's compliance with this Travel Manual, and for providing employee training on this material.

## 4. Policies

4.1. The following principles guide IPA travel planning:

- **Efficiency and Impact:** IPA encourages staff to be thoughtful about how travel can best advance our collective agenda and impact on the ground. Consider multiple objectives when planning a trip – how can we support the work of the organization more generally in this mission? Are there fundraising, scoping, or monitoring objectives that can be appropriately combined? Is combining multiple destinations useful and cost effective, while being vigilant about burn-out on long trips?
- **Effectiveness:** Travel carries benefits to our work as well as opportunity costs. IPA takes care to consider the appropriate staff composition and the right timing of travel to ensure that it advances our work, while also considering the range of pending priorities at our desk, however, staff members are encouraged to organize travel according to their needs and preferences within institutional guidelines and work objectives. Given the budgetary and time constraints, it is also important to carefully consider alternatives such as video conferencing. While face-to-face meetings are often preferred, they may not always be essential.
- **Health and Safety:** IPA is concerned and invested in protecting the health and safety of our staff. Clear processes and guidelines for travel help staff become aware of the resources available and to appropriately guard against risk.
- **Cost-consciousness:** As a non-profit organization, IPA also has a fiduciary responsibility to ensure resources are used prudently and that individuals do not incur inappropriate or excessive expenses. Proactively searching for the lowest fare and hotel accommodations within reasonable travel parameters, considering shifting dates and times to reduce costs, and being thoughtful about expenses incurred during travel can help to minimize costs.

4.2. IPA manages its travel resources to ensure the safety of all project staff, to protect its assets, to maximize the effectiveness of project funding, and to provide sufficient internal controls and standardization to reduce risk of potential fraud.

4.3. IPA adheres to the travel requirements and regulations of our sponsors. IPA travelers must ensure their travel is in compliance with regulations that may apply to their travel costs depending upon the funding source.

4.4. All travel must be approved by the relevant supervisory authority as described in this policy prior to booking travel, including travel dates, proposed itinerary, and airfare costs. The travel request

must detail a business purpose for the trip that is consistent with the overall project or company objectives.

- 4.5. IPA has partnered with a travel agency to ensure compliance with this travel policy and with U.S. Government regulations, where applicable, while maintaining required documentation on file. Travelers that do not use IPA's designated travel agency are responsible for ensuring compliance with this travel policy and any applicable donor or U.S. Government regulations and that the required documentation is kept on file. Travelers who do not use IPA's designated travel agency will be financially responsible to reimburse IPA for travel costs that are not in compliance with IPA policy. See the Guidance section below for additional benefits of using IPA's designated travel agency.
- 4.6. IPA will reimburse employees for all reasonable and necessary expenses while traveling on authorized business as described in this Global Travel Manual. Expenses that do not comply with the requirements set forth in this manual will not be reimbursed unless accompanied by a written justification and approval of the Chief Financial Officer.
- 4.7. The following travel-related costs are not reimbursable:
  - Airline club membership
  - Personal entertainment
  - Souvenirs
  - Fines and other expenses incurred as a result of traffic violations
  - Taxi cost for transportation to non-business or personal activities
  - Alcoholic beverages including beer, wine, and liquor
  - Annual credit card fees or credit card interest
  - Baby or pet-sitting
  - Clothing, luggage/suitcases, toiletries, or over-the-counter medication
- 4.8. Travel expenses that meet the requirements set forth in this Global Travel Manual incurred by a spouse or child(ren) under the age of 18 accompanying an employee on business will be reimbursed only when there is a bona fide business purpose for the travel of the spouse and/or child(ren), the business purpose is documented in the travel request, and the request is approved by the budget-holder.
- 4.9. Travelers to the following countries must inform Global Operations ([GlobalOperations@poverty-action.org](mailto:GlobalOperations@poverty-action.org)) prior to booking travel and at least two weeks in advance of travel so appropriate safety and security measures can be put into place including obtaining temporary corporate insurance coverage: Afghanistan; Algeria; Angola; Bahrain; Bosnia & Herzegovina; Burundi; Cambodia; Central African Republic; Cuba; Democratic Republic of Congo; Egypt; Ethiopia; Guinea-Bissau; Haiti; India; Indonesia; Iran; Iraq; Israel, Kosovo; Kuwait; Kyrgyz Republic; Lebanon; Libya; Niger; North Korea; Northern Ireland; Pakistan; Somalia; South Sudan; Sudan; Syria; Turkey; Venezuela; West Bank and Gaza; Yemen; Zimbabwe.
- 4.10. To ensure the safety and security of IPA employees, all traveling IPA employees must follow the protocol in [IPA's Staff Safety & Security Manual](#).

## 5. Policy Implementation

### Travel Approval

- 5.1. All domestic travel must be approved by the traveler's Assignment Supervisor. International travel must be approved by the Country Director (for Country Office staff) or appropriate Global Team Director (for Global Team staff).
- 5.2. Travel approval must be obtained for the proposed travel dates, air travel itinerary, and airfare or transportation costs. The travel approval request must include budget codes to which costs will be charged and a meaningful description of the travel purpose; a "business trip" is not adequate, however "Travel to country X to serve as Acting Country Director" is adequate. If travel is booked through IPA's designated travel agency, the travel details and travel approval are kept on file with the agency.
- 5.3. Travelers are expected to make international and U.S. domestic airfare arrangements through IPA's designated travel agent; however, when this is not feasible, travelers must present a comparison with two other written quotes (such as online quotes) for the same travel dates, class of service, and destination(s), accompanying their travel approval request to demonstrate the price reasonableness of the selected itinerary. A copy of the airfare comparison and the Assignment Supervisor's approval must be submitted with the traveler's expense reimbursement request.
- 5.4. Travel approval requests must indicate if the travel itinerary is being modified to accommodate personal travel or personal preferences, this includes departing from a different location than the traveler's home of record (or a location where they are already present for the purposes of conducting IPA business); adding non-business destinations to the itinerary; requesting specific stopover locations for personal reasons; or adding personal time before, during, or after the trip. If travel is booked through IPA's designated travel agency, these travel details will be communicated to the Assignment Supervisor automatically via the travel request workflow. If travel is not booked through IPA's designated travel agency, the traveler must present written evidence of the cost of trip if no personal travel adjustments were to be made.
- 5.5. Travelers must ensure that required approvals have been obtained from the client and/or sponsor, when applicable, prior to incurring travel costs. If in doubt about sponsor travel approval requirements, the traveler should consult the Grants team. See section on 'USG-funded Travel' below for specific approval requirements of U.S. Government-funded travel.

## Travel Advances

- 5.6. Country Offices may set their own policies on travel advances which may be equivalent to or more restrictive than the policies described in this *Travel Advances* section of the Global Travel Policy.
- 5.7. When needed, IPA employees are eligible to receive a travel advance to cover personal expenses while traveling. Travel advances must be approved by the Assignment Supervisor and must not exceed projected costs of lodging, transportation, meals, and incidental expenses.
- 5.8. Travel advances paid by IPA to an employee must be settled by submitting an expense report or reimbursement request within 30 days of travel completion. The office from which a travel advance was issued must be the office that settles the advance.
- 5.9. Independent consultants, PIs, and employees of subcontractors are not eligible for travel advances from IPA. IPA can book and pay for lodging and transportation costs on behalf of these individuals where feasible and/or necessary to minimize the personal financial burden on them.

- 5.10. Travel advances are considered personal funds and the funds therefore are the responsibility of the traveler until the employee either submits an approved expense report in an amount equal to or exceeding the advance or returns the balance of the advance not accounted for in the expense report. Travel advances outstanding for more than 30 days after the end of a trip may be cleared through payroll deduction(s).
- 5.11. All previous travel advances must be cleared before an employee is eligible for any new travel advance. No advance will be issued if any portion of an existing travel advance has not been repaid.

## Travel Expenses

- 5.12. Country Offices may have a country-specific policy that addresses travel expenses which may be equivalent to or more restrictive than the requirements set forth in this *Travel Expenses* section of the Global Travel Policy. In the absence of a country-specific policy, travelers will follow the policies documented in this *Travel Expenses* section.
- 5.13. When IPA staff travel internationally for IPA business on behalf of a project and/or Country Office, the traveler must adhere to the travel policy of the Country Office and project that is funding the travel to ensure that travel expenses align with what has been budgeted and approved.
- 5.13.1. When travel will be funded by a mixture of Overhead and project funding, the traveler should work with both budget holders to agree how travel expenses will be handled.
- 5.14. Where a per diem rate for meals and incidental expenses is not established, expenses incurred for personal meals, lodging, and incidental expenses are reimbursed based upon actual expenses incurred, as documented by receipts for all expenses above USD \$25. (Expenses below USD \$25 do not require a receipt). See [Procedure 3](#) in this manual for a list of reimbursable travel expenses.
- 5.15. Grant-funded travel expense incurrence and reimbursement must adhere to the requirements of the agreement and sponsor.
- 5.16. When travel is funded by Overhead or Unrestricted funds IPA issues per diem for meals and incidental expenses (M&IE). See section on Per Diem below for per diem-specific policies. IPA does not issue per diem for lodging. See section on Lodging below for lodging-specific policies.
- 5.17. Employees must submit expense reports within 30 days after the completion of each trip in order to receive reimbursement. Receipts for all expenses greater than USD \$25 must accompany reimbursement requests. Requests for expense reimbursement after 30 days may be denied.
- 5.18. All expenses must be itemized on the expense report to ensure expenses are coded to the correct cost categories.
- 5.18.1. When meals will be itemized, it is preferable that travelers include one "meals" line in the expense report supported by a table itemizing meal costs.
- 5.19. Although travel expenses are reimbursable when travel is on a weekend, IPA does not pay employee salary for travel during weekends unless the employee is eligible for overtime.
- 5.20. ATM fees and credit card fees/foreign transaction fees are reimbursable up to USD \$50 per trip of two weeks or less; these fees must be listed in the expense report as a separate line item.

- 5.21. Travelers may expense tips on meals, transportation, and other miscellaneous services provided that they are directly related to IPA business travel and within reasonable and customary amounts.
- 5.22. International travelers requiring logistical support from the Country Office for booking and payment of services, including lodging, transportation, and other services, must request support well in advance of travel and the traveler must provide the correct billing codes for any travel expenses for which the Country Office will facilitate payment.

## Per Diem

- 5.23. For situations not otherwise described in this policy, per diem for U.S. Government-funded travel must not exceed GSA rates for U.S. domestic travel and Department of State rates for international travel.
- 5.24. Country Office's may set per diem rates for Country Office-funded international travel that are more restrictive than the requirements set forth in this *Per Diem* section of the Global Travel Policy. Additionally, Country Offices may set per diem rates for Country Office domestic travel. If such per diem rates are to be set by a Country Office, the rates must be based upon an estimation of reasonable actual costs and may not exceed any applicable donor or client per diem limitations.
- 5.25. When international and U.S. domestic travel is funded by Overhead or Unrestricted, IPA issues per diem for travelers. Per diem is intended to cover the costs of meals and incidental expenses including refreshments, meals, and snacks and is based on the costs of an average breakfast, lunch, and dinner at facilities typically used by employees at that location, including taxes, service charges, and customary tips.
- 5.26. Event or conference organizers may set a per diem rate for participants. Should a project or conference organizer desire to establish per diem rates for travelers, the proposed rate must be in alignment with any donor requirements.
- 5.27. Personal meal expenses are not required to be itemized by employees collecting per diem.
- 5.28. Per diem for Overhead and Unrestricted-funded travel within the U.S. is USD \$70 per day. Per diem for Overhead and Unrestricted-funded travel outside the U.S. is USD \$50 per day.
- 5.29. IPA employees are eligible to receive per diem only when traveling for more than 12 consecutive hours in one day. I.e., if the trip is less than 12 hours from start to finish, per diem does not apply.
- 5.30. Daily per diem rates for travel funded through Overhead or Unrestricted funds must be reduced to 75% of the rate for the destination location in the following circumstances<sup>1</sup>:
- When travel is more than 12 hours but not a full 24-hour travel day;
  - On the first day of travel;
  - On the last day of travel.
- 5.31. IPA employees seeking payment of per diem must complete the Per Diem Calculator (Annex 7) and attach it as backup to their expense report.

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<sup>1</sup> FTR 301-11.101



- 5.32. When meals are provided during travel, for example by a hotel or as part of an event, the daily per diem rate (with travel day reduction, if applicable) must be reduced by the following percentages depending upon the meal that was provided:

Meal	Breakfast	Lunch	Dinner
Per diem discount percentage	15%	25%	40%

## Safety & Security

- 5.33. All employees must inform the hosting Country Office of their travel plans prior to travel and must ensure international travel itineraries are entered into IPA's traveler tracking platform; this is done automatically if the employee books travel through IPA's travel agency. If travel is booked using a source other than IPA's Travel Agency, the employee must submit the international travel itinerary to the tracking platform as per [Procedure 1: Preparing for Travel](#).
- 5.34. Prior to travel to a Country Office, travelers must request and read the Country Office's Staff Safety & Security Manual and/or Welcome Guide and must read any pre-travel briefing information provided by International SOS (this information is sent automatically to the traveler's email when travel is booked through IPA's designated travel agency.).
- 5.35. International travelers to a country or region ranked by International SOS as 'High' or 'Extreme' must request a security briefing from International SOS at least one week prior to travel.
- 5.36. International travelers must have an arrival plan in place prior to departure. The plan should detail the party responsible for picking them up upon arrival at the airport, the phone number for the IPA focal point contact in country in case the designated pick-up fails to show, a back-up contact, and the address of the hotel in the country of arrival.
- 5.37. Prior to travel all IPA employees must ensure they are properly insured for medical coverage during travel. Insurance requirements will depend on employment type and location. Insurance coverage can be confirmed by contacting the Human Resources team of the employee's office.
- 5.38. All IPA employees, independent consultants, and student volunteers who travel internationally for IPA business are covered by IPA's medical and security evacuation policies through International SOS. Subcontractor employees are not covered under IPA's plans and must be covered by their own organization's evacuation and insurance policies.

## Travel Documentation

- 5.39. Travelers are expected to manage obtaining visas and passports independently or with the support of IPA's designated travel agency. When the support of an IPA office is needed, this support must be requested well in advance of planned travel.
- 5.40. IPA will reimburse costs of visas for work-related travel. IPA will also reimburse costs related to passport renewal or amendment if required for work-related travel. The costs of expediting visas will not be reimbursed unless the delays were caused by IPA.

- 5.41. Travelers must have proper and valid documents (passports and visas) prior to traveling when required. Passports must have at least 6 months validity beyond the anticipated travel dates with several blank visa pages. Travelers must obtain proper documents in a timely manner so as to avoid delays and/or unnecessary fees.
- 5.42. Travelers must consider the country or region-specific vaccination requirements and obtain vaccinations, which are a reimbursable travel expense, as required prior to travel to ensure entry requirements are met. It is recommended that travelers consult a knowledgeable healthcare professional for travel-related medical advice regarding vaccinations and preventative health treatment prior to international travel.

## Airfare

- 5.43. Air travel must be arranged to the fullest extent possible using the lowest economy fare (coach) that meets the business need (including arrival and departure times) via the most direct and expeditious route that can be changed with a fee. If travelers opt for alternative routing due to personal preferences, such as air carrier or layover duration or location, the traveler must pay the difference.
- 5.44. Upgraded classes of service (e.g., Economy Plus, Coach Elite, Coach Plus, Preferred Coach) airfare are not reimbursable. Upgrades to other-than-economy fare are permitted at the traveler's personal expense. Exceptions to this policy must be approved by the CFO. See the section on 'U.S. Government-funded Travel' for additional requirements that must be met when the exception is associated with U.S. Government funding.
- 5.44.1. Exceptions to the use of upgraded classes of services may be approved when requested for medical reasons and when accompanied by a signed note from the traveler's doctor. This medical note must be no more than one year old and must be on file for each business trip.
- 5.45. While travelling internationally a rest period (overnight layover) is permitted assuming all of the following conditions apply:
- The scheduled flight time, including non-overnight stopovers and change of planes, is in excess of 14 hours; and
  - The layover may not exceed 24 hours, and
  - Travel is by a direct or usually traveled route, and
  - Travel is by coach class.<sup>2</sup>
- 5.46. Whenever possible, travelers must make air travel reservations as far in advance of travel as practical in order to obtain reasonable pricing.
- 5.47. When booking through IPA's designated travel agency, the default mode of payment for costs for traveler airfare will be direct payment by IPA unless use of another method of payment is requested by the traveler. Travelers may choose to use a personal credit card for airfare payment in order to benefit from travel points or other benefits.
- 5.48. Traveling employees may retain personal frequent flyer program benefits resulting from work-related travel, however, participation in these programs must not influence flight selection

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<sup>2</sup> GSA 301-11.20 and ADS 522.3.18

when doing so would result in incremental cost to IPA beyond the lowest available economy fare. Travelers are responsible for handling all aspects of personal frequent flyer accounts.

- 5.49. Travelers who choose not to book airfare using IPA's designated travel agency are required to include the following documents as backup to their expense report in order to obtain reimbursement for the airfare:
- airline itinerary and/or tickets
  - rate comparison showing at least two comparable fares for the same travel dates
  - travel approval by Assignment Supervisor (and any additional approvers required)
  - If route or duration of stay is modified for personal reasons, include travel cost comparison
  - If change fees are incurred, include documented justification of the reason for change
  - If travel is for a US Government-funded project or award and did not comply with the [Fly America Act](#), include a justification
- 5.50. Travelers who choose not to book airfare using IPA's designated travel agency are required to submit their itinerary to IPA's travel tracking platform, by forwarding the itinerary to [PovertyactionTravel@itinerary.internationalsos.com](mailto:PovertyactionTravel@itinerary.internationalsos.com).
- 5.51. Country Offices that set up agreements with a local travel agency must ensure that the agency adheres to the policies in this *Airfare* section of the Global Travel Policy.
- 5.52. Additional baggage costs will be covered by IPA only if the extra baggage is directly related to the transportation of IPA property or equipment or is at the request of IPA (e.g., bringing supplies to the field) and when approved by the Assignment Supervisor.
- 5.53. If changes must be made to an itinerary, travelers are expected to take proactive and pre-emptive steps to defray costs to the extent possible, for example by modifying travel arrangements as soon as practical.
- 5.54. Personal travel booked in conjunction with or in association with work-related travel is the responsibility of the employee. IPA will not reimburse for personal travel expenses when personal travel is made in conjunction with work-related travel. Travelers are required to pay directly any incremental costs for airline tickets, hotel accommodations and other expenses incurred relating to personal travel. Travelers are expected to demonstrate the cost difference resulting from modifying a trip for personal reasons, and under such circumstances the traveler is responsible for the difference.
- 5.55. Supervisors must ensure that staff travel is planned to optimize business activities. Personal travel planned in conjunction with work travel must be appropriate and proportional to the business trip. Supervisors with questions regarding appropriateness of personal travel requests taken in conjunction with work travel should consult the CFO for guidance.
- 5.56. IPA is not responsible for the impact of changes to or cancellation of a business trip on personal travel arrangements. In such instances the traveler is responsible for any costs associated with modifying or cancelling personal travel arrangements; travelers therefore may wish to consider obtaining travel insurance for their personal travel.
- 5.57. Change fees for air travel are reimbursable due to official business purposes when justifiably documented. Travelers must provide a written explanation discussing why the itinerary had to be changed for business reasons to the Assignment Supervisor for approval; this approval

must accompany the backup documentation for the change fee. Plausible explanations include but are not limited to:

- A delay in a scheduled meeting or event initiated by the individual or group with whom the traveler was scheduled to meet,
  - Extending travel due to unforeseen circumstances, i.e., change in scope of work where additional time is needed and has been approved to achieve such scope.
- 5.58. Funds from refunds or discounts issued to the traveler for unused tickets or cancelled/changed flights must be returned to IPA if the employee reimbursement has already occurred, otherwise the employee must request reimbursement for only the amount of actual expenses incurred after accounting for any refunds issued.
- 5.59. Change fees resulting from traveler personal preferences, personal activities, or missed flights due to fault of the traveler are not reimbursable and must be paid by the traveler.

## Ground Transportation

- 5.60. The most economical mode of transportation that meets the business need and safety requirements should be used when traveling. Travelers are encouraged to consult with the IPA office at their destination location to arrange local travel through preferred vendors.
- 5.61. Parking fees and tolls will be reimbursed with a receipt when they are incurred for business purposes. Fines for traffic and parking violations are not reimbursable.
- 5.62. It is the responsibility of the vehicle's owner to carry adequate insurance coverage – IPA's corporate insurance policies do not cover vehicles privately owned by staff. IPA's safety requirements for personal vehicle use are documented in the Staff Safety & Security Manual.
- 5.63. Country Offices may set their own expense reimbursement policy for personal vehicle use.
- 5.64. Employees who use their personal vehicle for IPA business within the U.S. will be reimbursed at the U.S. General Services Administration (GSA) per mile rate. See <http://www.gsa.gov/portal/content/100715> for the current rate. The law requires that travelers substantiate their mileage expenses by adequate records or by sufficient evidence to support the reimbursement request. The mileage rate includes all costs for operating the car, including gas, wear and tear, depreciation, etc. The mileage rate does *not* include parking and tolls; these may be reimbursed in addition to the mileage reimbursement.
- 5.65. Ground transportation for U.S.-based employees who work outside of an IPA office and travel intermittently to an IPA office for work-related purposes may be reimbursable. Employees must check with their supervisor to determine what expenses/mode of travel will be reimbursed when visiting other IPA office locations.
- 5.66. IPA does not reimburse employees for a regular commute to the office where they have been designated to work long term.

## Lodging

- 5.67. When travel expenses are incurred with sponsor funding, all traveler lodging must adhere to sponsor and/or client requirements for lodging in addition to any IPA-imposed lodging cost limitations.

- 5.68. Travelers must seek guidance from the Assignment Supervisor regarding lodging selection to ensure that it is within budget, does not exceed donor lodging cost limitations, and represents a reasonable cost. Assignment Supervisors must ensure that lodging expense limitations, where applicable, are communicated to the traveler and enforced. Travelers are encouraged to consult with the IPA office at their destination location to arrange lodging through preferred vendors.
- 5.69. Lodging bookings must follow the requirements of the Global Procurement Manual except when an IPA office has established nightly lodging maximums, in which case any lodging equal to or less than the maximum may be booked without a competitive procurement process. If such lodging rates are set, they must be based upon an estimation of reasonable actual costs and may not exceed any applicable donor or client lodging cost limitations.
- 5.70. When travel is for a group activity (ex. conference, training, etc.), travelers are required to use accommodations where there is an IPA-negotiated or group rate as communicated by the organizer of the activity.
- 5.71. Travelers to an IPA Country Office must consult with the hosting office to identify lodging options that meet IPA security requirements described in the [Safety & Security Manual for IPA Management](#). For lodging in countries where IPA does not have a presence, travelers are encouraged to contact Global Operations or International SOS for assistance in identifying lodging that meets IPA's security requirements. (See the [Safety & Security Manual for IPA Management](#) for additional information on hotel safety criteria.)
- 5.72. Many hotels have frequent guest programs that reward travelers with free accommodations in exchange for a given number of paid room nights at the hotel. Awards from such programs may be retained by travelers for personal use. However, participation in these programs must not influence hotel selection when it would negatively impact cost, safety and security, or logistics.

## Communication

- 5.73. IPA encourages travelers to carry a cellular phone with international calling capability or to purchase a local SIM card, which is a reimbursable travel expense, to facilitate communication while traveling.
- 5.74. Travelers purchasing a local SIM card and airtime and/or data to communicate while traveling must confirm the budgeted amount for communications expenses with their Assignment Supervisor and must not exceed the approved amount. IPA strongly encourages staff to use free calling services such as Skype or WhatsApp to decrease travel-related communication expenses, where possible.
- 5.75. Necessary business calls made from personal cell phones while traveling can be expensed with approval from the Assignment Supervisor. The expense report claim for these calls must detail the purpose of the call, the person called, and, where possible, the provider's call log should be attached.

## Property and IT Equipment

- 5.76. When traveling for IPA business, travelers are responsible for exercising reasonable precautions to protect IPA's property. IPA and/or its insurance carriers will assist in replacing lost

or stolen IPA property if the employee has taken such precautions, if not, the employee may be responsible for the replacement of the item.

- 5.77. If losses of IPA property occur, the traveler must file a police report documenting the loss and report the loss to the Legal team so IPA's insurance administrator can be notified.
- 5.78. Employees must not pack electronics, including laptop computers or survey equipment in checked baggage. Airlines are not liable for electronic equipment losses in checked baggage, therefore all IPA equipment must be transported in carry-on baggage.
- 5.78.1. When carrying-on electronic equipment is not feasible or allowed by the destination's entry requirements, the traveler should consult the MIST team regarding alternatives to hand-carrying equipment.
- 5.79. Any electronic equipment (medical equipment, professional video equipment, survey equipment, and computers) carried internationally may require special documentation from the U.S. in order to avoid taxes, tariffs, or unnecessary delays in customs. If transporting equipment other than personal equipment, internationally contact IPA's MIST for assistance in obtaining the required documentation or identifying alternatives to hand-carrying equipment.

## U.S. Government-funded Travel

- 5.80. Per the [Fly America Act](#), all air travel funded by the U.S. Government in which the origin or final destination is within the United States must be on a U.S.-flag air carrier, Open Skies carrier, or U.S. code share flight.
- 5.81. Travelers whose U.S. Government-funded travel will not adhere to Fly America Act requirements must provide a written justification as to why. Cost alone is not a justification for taking a foreign carrier per Federal Travel Regulations (FTR). When booking through IPA's designated travel agency the agency will ensure compliance to the applicable regulations and retain required documentation on-file when informed that the flight is related to U.S. Government-funded travel.
- 5.82. Valid Fly America Act exceptions include:
- No US carrier flies to the final destination.
  - Flying on a US carrier would require at least two more plane changes than if a foreign carrier were used.
  - Flying on a US carrier would take at least 6 hours longer than if foreign carrier were used.
  - Flying on a US carrier causes passenger to wait at least 4 hours at an overseas connection point
  - For flights of less than 3 hours, flying US carrier would take 2 times as long as flying foreign carrier
  - Flying US carrier causes total trip to be extended by more than 24 hours than if foreign carrier was used
  - No coach seat is available on US carrier
  - US carrier switches passenger to flight on foreign carrier involuntarily
  - Travel originates in a foreign country and is destined for a foreign country, i.e., travel between two points abroad.
- 5.83. Should an employee not book international flights through IPA's designated travel agency the employee must ensure that airfare adheres to Fly America requirements, when applicable.

Travelers who do not use IPA's designated travel agency will be financially responsible to reimburse IPA for travel costs that are not in compliance with IPA policy.

- 5.84. The IPA Grants team must be consulted for travel funded by the U.S. Agency for International Development (USAID), as prior approval in writing from the Agreement or Contract Officer may be required.
- 5.85. Business class airfare may be purchased with U.S. Government funding only with written approval from and authorization by Agreement or Contract Officer in addition to the IPA requirements for business class airfare described in this policy. Circumstances justifying the use of for U.S. Government-funded business class air accommodations may include the following<sup>3</sup>:
- Economy class air accommodations not available;
  - Travel is by a person with a physical or medical condition that is certified by a doctor;
  - Security reasons or exceptional circumstances including emergency evacuation;
  - Use of frequent traveler benefits, resulting in no additional cost to upgrade;
  - Coverage of additional cost by a non-federal source.
  - Circumstances beyond the control of the traveler while en route (e.g., schedule changes, grounding of planes, etc.)
- 5.86. Lodging for U.S. Government-funded travel must adhere to [GSA rates](#) for U.S. domestic travel and to [Department of State](#) lodging rate limitations for international travel.
- 5.87. Travelers planning a trip funded by U.S. Government contracts (not cooperative agreements or grants) should notify the Grants and Human Resources teams so that Defense Base Act (DBA) insurance coverage can be purchased for the traveler as required by the U.S. Federal Acquisition Regulations.
- 5.88. International travelers for USAID-funded contracts must demonstrate that they are physically qualified to engage in the type of activity, including any travel, for which s/he is retained, and is physically able to reside in the country to which s/he is assigned. Prior to departure, travelers must submit the required documents directly to Global Human Resources along with a notification to the Assignment Supervisor that the documentation has been submitted. Documents containing medical information are considered personal and confidential; as such hard and electronic copies may not be stored in files outside of Global HR. Requirements for medical certification for the purpose of USAID-funded travel are:
- For assignments of less than 60 days, the traveler must provide an annual medical certification or doctor's note that s/he is healthy to travel. If a doctor's note is used, it may be issued by the individual's personal physician in conjunction with their annual physical check-up. Seen Annex 5 for a template letter that can be used.
  - For assignments of 60 days or more, the traveler is required to undergo a one-time medical examination by a licensed physician who completes the USAID Physical Examination form prior to travel (Annex 6).

## 6. Guidance

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<sup>3</sup> <https://www.gsa.gov/policy-regulations/policy/travel-management-policy/travel-reporting/premium-class-travel-reports/travel-exception-codes-and-frequently-asked-questions>

This section describes guidance to aid in the understanding and implementation of this procedure and does not include mandatory requirements.

- 6.1. In addition to ensuring compliance with donor requirements and IPA policy, the benefits of using IPA's designated travel agency include:
  - Access to humanitarian fares for flights not available to the public
  - Ability to hold tickets for 24 hours
  - Travel alerts prior to and during travel
  - 24/7 support if there are issues during travel including cancelled or delayed flights
  - Support in making ticket modifications, including flight changes
  - Guidance on required vaccinations and travel documentation, including visas, based upon nationality
  - Option of direct billing to IPA for travelers not wishing to use personal credit cards
- 6.2. Travelers should discuss visa requirements and the most appropriate visa type with the Country Director, or designee, and Assignment Supervisor to ensure the appropriate type of visa is obtained.
- 6.3. Prior to travel, travelers should research short-term international phone plans and phone call rates for the countries which they will be traveling with their cellular carrier. Some providers offer reasonably-priced short-term international phone and/or data coverage. Cost-effectiveness of such coverage should be compared to the cost of purchasing a local SIM and airtime minutes and data so that the traveler can utilize the most cost-effective option, when practical.
- 6.4. Travelers are encouraged to discuss their travel plans with their personal credit/debit card carriers prior to departure from the United States as some banks and credit card companies may flag or prevent transactions from overseas without prior notification. Travelers are also encouraged to carry an extra bank card in a separate location in case of theft or misplacement of card.



## Procedure 1: Preparing for Travel

### 1. Purpose & Scope

- 1.1. This procedure implements the policies related to travel approval stated in the Travel Policy.
- 1.2. The purpose of this procedure is to describe the steps a traveler takes to prepare for a business trip and includes the processes for the following:
  - requesting approval prior to travel;
  - obtaining passports, visas and immunizations/medical certificates;
  - requesting a travel advance;
  - making travel arrangements for lodging, transportation, insurance, and export control; and
  - obtaining information for evacuation and security guidance

### 2. Roles & Responsibilities

- 2.1. IPA travelers are responsible for requesting and obtaining travel approval and travel advance approval, where applicable, for obtaining necessary documentation and medical inoculations prior to travel, and for proactively making travel arrangements in a timely manner, ensuring costs are reasonable. Travelers also must ensure that medical, security-related, and/or logistical travel information is obtained prior to departure.
- 2.2. Assignment Supervisors are responsible for reviewing and approving travel requests in a timely manner, ensuring that the requested trip is consistent with the official business purpose, that there are sufficient funds within the budget, and that the traveler has obtained any necessary client and/or donor approvals where applicable. Assignment Supervisors are also responsible for reviewing and approving travel advance requests, ensuring that the amount requested does not exceed the anticipated expense amount.
- 2.3. Global Operations is responsible for ensuring that travelers have access to adequate safety and security resources prior to travel and for providing safety and security related support to travelers when requested.
- 2.4. The Finance team of the office to which the employee is assigned is responsible for issuing approved travel advances according to IPA policy when applicable.

### 3. Process

Actor	Action: Pre-approval
Traveler	<ol style="list-style-type: none"> <li>1. Discuss anticipated travel plans with Assignment Supervisor, including scope of work for the trip.</li> <li>2. If travel is on behalf of a project and will be funded by a donor agreement, consult the project team and/or Grants Team to determine if client travel approval and/or country clearance is required.               <ol style="list-style-type: none"> <li>2.1. If client approval is required, work with the Grants Team to obtain approval.</li> </ol> </li> </ol>

	<ol style="list-style-type: none"> <li>3. Ensure there is enough time prior to travel to obtain required travel documents, such as valid passport, visa(s), and immunization(s) documentation.</li> <li>4. Initiate a travel booking request using one of the following methods several weeks in advance of departure:             <ul style="list-style-type: none"> <li><u>Book request through online portal (COMING SOON!):</u> <ol style="list-style-type: none"> <li>4.1. Navigate to IPA’s travel agency’s website. If you are not yet registered, submit a registration request.</li> <li>4.2. Initiate an online booking reservation stating travel dates and specific business purpose and/or planned objectives. The purpose must be clearly defined; “business travel” is not an adequate purpose.</li> <li>4.3. Identify a fare which is consistent with IPA’s airfare policies about route, class of service, Fly America/Open Skies compliance requirements, and that is the lowest economy fare that meets travel needs.</li> <li>4.4. Submit the itinerary via the portal for approval.</li> </ol> </li> <li><u>Book request by contacting a travel agent:</u> <ol style="list-style-type: none"> <li>4.5. Contact the travel agency via phone or email (<a href="mailto:inspireteam1.us@keytravel.com">inspireteam1.us@keytravel.com</a>; +1-646-289-680), submitting a completed Travel Agency Request Form (see Annex 1).</li> <li>4.6. Work with the agent to identify an itinerary that meets the travel requirements and complies with IPA’s travel policy.</li> </ol> </li> <li><u>Book travel independently:</u> <ol style="list-style-type: none"> <li>4.7. Search flights online, ensuring that the selected flight is the lowest economy fare via the most direct and expeditious route and that it complies with the requirements of IPA’s travel policy.</li> <li>4.8. Save the itinerary that will be requested plus two additional quotes for the proposed destinations and dates to serve as a cost comparison.</li> </ol> </li> </ul> </li> <li>5. Obtain Assignment Supervisor approval of the selected itinerary.             <ol style="list-style-type: none"> <li>5.1. If travel is booked via the travel agency’s online portal the travel agency will notify the Assignment Supervisor requesting approval. Once approved, the ticket will be issued.</li> <li>5.2. If travel is booked via email using the Travel Request Form, the travel agent will request approval of the appropriate party via email.</li> <li>5.3. If travel is not booked through IPA’s travel agency, submit a completed Travel Request Form (Annex 2) along with a cost comparison showing two additional quotes for the proposed destinations and dates and any other required documentation for the type of travel.</li> </ol> </li> </ol>
Assignment Supervisor	<ol style="list-style-type: none"> <li>6. Review proposed business purpose, itinerary, cost of ticket, and compliance with IPA travel policy.</li> </ol>

	<p>7. Approve or reject the itinerary in a timely manner based upon review of the proposed itinerary.</p> <p>7.1. If travel is to any of the following countries, inform the Global Operations team at least two weeks in advance so appropriate safety and security measures can be put into place and so temporary corporate insurance coverage can be obtained prior to travel: Afghanistan; Algeria; Angola; Bahrain; Bosnia &amp; Herzegovina; Burundi; Cambodia; Central African Republic; Cuba; Democratic Republic of Congo; Egypt; Ethiopia; Guinea-Bissau; Haiti; India; Indonesia; Iran; Iraq; Israel, Kosovo; Kuwait; Kyrgyz Republic; Lebanon; Libya; Niger; North Korea; Northern Ireland; Pakistan; Somalia; South Sudan; Sudan; Syria; Turkey; Venezuela; West Bank and Gaza; Yemen; Zimbabwe.</p> <p>8. If additional approvals are required, forward the request to the appropriate individual(s) for approval.</p> <p>8.1. If travel is being requested through IPA’s designated travel agency, approval routing will be facilitated by the agency, so no further action is needed.</p>
Traveler	<p>9. Once required approvals of the itinerary are obtained, proceed with booking air travel.</p> <p>9.1. If travel is booked through IPA’s designated travel agency once travel has been approved a ticket will be issued to the employee via email. Follow up if needed to confirm travel booking is complete.</p> <p>9.2. If travel is not booked through IPA’s designated travel agency, once travel approval is received, proceed with booking the flight using a personal credit or debit card.</p> <p>10. If travel is not booked through IPA’s designated travel agency, submit itinerary to the travel tracking platform by forwarding the itinerary to <a href="mailto:PovertyactionTravel@itinerary.internationalsos.com">PovertyactionTravel@itinerary.internationalsos.com</a>.</p> <p>10.1. See the Travel Tracker section of <a href="#">this guide</a> for detailed instructions for submitting or modifying an itinerary.</p>
<b>Actor</b>	<b>Action: Post-approval</b>
Traveler	<p>1. As early as feasible prior to travel, discuss appropriate visa type with the hosting country office.</p> <p>2. Ensure required visas are obtained either directly through the appropriate embassy, with assistance from the hosting office or through IPA’s designated travel agency.</p> <p>2.1. Contact either the hosting office or Global Human Resources for assistance in obtaining IPA documentation, including invitation letters, when required for obtaining visas.</p> <p>3. As early as feasible prior to travel, obtain vaccinations required for entry, as applicable.</p>

	<ol style="list-style-type: none"> <li>3.1. Visit a travel clinic or physician to obtain required vaccinations and to update the World Health Organization (WHO) yellow card, if needed.</li> <li>3.2. See the Guidance section of this procedure below for additional recommendations regarding immunizations and other medical considerations during travel.</li> <li>4. If travel is for a U.S. Government-funded program, ensure the appropriate physical fitness certification is on file.             <ol style="list-style-type: none"> <li>4.1. Use Annex 6 if the assignment is under 60 days. Complete this certification only once per year; it is kept on file and used for all U.S. Government-funded assignments under 60 days during that year.</li> <li>4.2. Use Annex 7 if the assignment is over 60 days.</li> <li>4.3. Submit the completed certification to the receiving office’s HR team and inform the Assignment Supervisor that this requirement has been completed.</li> </ol> </li> <li>5. Inquire about options for lodging arrangements.             <ol style="list-style-type: none"> <li>5.1. Confirm with the Assignment Supervisor the assignment lodging budget.</li> <li>5.2. When traveling to locations where IPA already has an office, check with the Country Office team to determine if there are established negotiated rates with hotels that meet IPA security recommendations, and inquire about the Country Office’s ability to provide support in making lodging reservations.</li> </ol> </li> <li>6. Secure lodging reservations.</li> <li>7. Review <a href="#">Procedure 3 Reimbursable Travel Expenses</a> to understand what types of travel expenses are reimbursable and the backup documentation required for reimbursement.</li> <li>8. Request a travel advance if needed for airfare, lodging, or other anticipated expenses through the finance team of the office where the traveler is employed.</li> </ol>
<p>Assignment Supervisor</p>	<ol style="list-style-type: none"> <li>9. Review travel advance request for cost reasonableness based on anticipated airfare, lodging, and miscellaneous costs.</li> <li>10. Approve travel advance request if the request is for an amount equivalent to or less than anticipated travel expenses for the trip.</li> </ol>
<p>Traveler</p>	<ol style="list-style-type: none"> <li>11. Review the profiles of countries to be visited on the International SOS (ISOS) platform.             <ol style="list-style-type: none"> <li>11.1. If travel is to a country or region ranked by ISOS as ‘High’ or ‘Extreme’, schedule a security briefing with ISOS.</li> <li>11.2. Direct questions regarding safety and security during travel either to an ISOS Assistance Center or to the Global Operations Director. See Annex 3 International SOS Basics and Card for ISOS Assistance Center phone numbers.</li> </ol> </li> </ol>

12. Print the ISOS brochure with IPA's membership number and Assistance Center phone numbers to carry while traveling. (See Annex 3)
  - 12.1. It is recommended that travelers also download the ISOS phone app, which will enable receipt of travel notifications and in-app access to ISOS agents who can assist with travel-related needs.
13. If applicable, register with your embassy in the country(ies) of travel.
14. If traveling to a country where there is an IPA Country Office, contact the office to:
  - request a copy of their Staff Safety & Security Manual and/or Welcome Guide,
  - request a copy of the local emergency contacts list and determine the local IPA point(s) of contact for logistical matters, and
  - schedule a pre-travel briefing with the Country Office to inquire about trip logistics, health and safety matters, and communication and finance recommendations during travel.
15. Review Traveler Resources (Annex 7) and direct any questions regarding insurance coverage and medical evacuation while traveling to Global HR.
16. Make arrangements for airport pick-up through the hotel, the Country Office, or a known local, reputable taxi service provider.
17. If traveling with equipment in addition to that which is used for personal business use, contact the MIST team as additional documentation may be required for customs clearance. Note, it is not recommended that travelers carry equipment in addition to their personal work items due to export control restrictions in many countries.
18. If travel plans change, contact the travel agency, hotel, and/or Country Office providing support as quickly as possible to make changes or cancellations to minimize potential fees.

## 4. Guidance

This section describes guidance to aid in the understanding and implementation of this procedure and does not include mandatory requirements.

- 4.1. When applicable, inoculations and vaccines should be recorded and updated on the traveler's World Health Organization (WHO) yellow card, which should always be carried when traveling abroad. Some countries require documented proof of inoculations before allowing entry. Given the prevalence of unsanitary medical conditions and the high risks associated with inoculations, one should avoid having them done abroad.
- 4.2. Travelers who need to take particular medications on a regular basis should work with their medical provider to ensure they have an adequate supply or will be able to obtain additional supplies while traveling or working abroad on an extended assignment.

## Procedure 2: During and After Travel

### 1. Purpose & Scope

- 1.1. This procedure describes the steps a traveler should take during travel to travel safely, to address travel itinerary changes, and to ensure that adequate documentation to substantiate travel expenses is collected. This procedure also describes the steps a traveler should take after travel is completed to request travel expense reimbursement.
- 1.2. This procedure applies to all IPA employees who will seek travel expense reimbursement of expenses through the Global Finance team. Employees who seek reimbursement of travel expenses directly through a Country Office must follow the local reimbursement process.

### 2. Roles & Responsibilities

- 2.1. IPA travelers are responsible for ensuring that expenses incurred while traveling are consistent with IPA policy, for collecting receipts for travel expenses greater than \$25 (unless donor requirements specify otherwise), and for tracking all expenditures under \$25. Travelers are also responsible for preparing and submitting travel expense reports that meet the requirements described in this Global Travel Manual. When required by the Assignment Supervisor, the traveler is required to submit a trip report describing the outcome of the trip.
- 2.2. Assignment Supervisors are responsible for supporting the traveler should itinerary changes be required during travel and for reviewing and approving travel expense reimbursement requests and ensuring expenses meet the criteria defined in this Global Travel Manual and are substantiated by receipts when above \$25 (unless donor requirements require otherwise).
- 2.3. The Finance team of the country to which the employee is assigned is responsible for issuing payments for approved travel expense reports, for setting and enforcing IPA policy on expense reimbursement, and for tracking outstanding travel advances.

### 3. Process

Actor	Action: During Travel
Traveler	<ol style="list-style-type: none"> <li>1. While traveling, collect information and documentation that will be required for travel expense reimbursement; this could include:                             <ul style="list-style-type: none"> <li>• Receipts for travel expenses (required for any expense above \$25)</li> <li>• Log of other travel expenses less than \$25 including cost, date, and item description</li> <li>• Log of transportation/taxi expenses including cost, date, origination, destination, and business purpose of travel (ex. Travel to Partner X office for meeting)</li> <li>• When not receiving per diem, log of meal expenses including cost and date and receipts, where applicable</li> </ul> </li> </ol>

	<ol style="list-style-type: none"> <li>2. If an expense is greater than \$25 and the vendor does not provide receipts, complete a Travel Expense Receipt (Annex 9), noting the date of purchase, cost, item description, and vendor name.</li> <li>3. Follow all safety and security protocol and recommendations provided in <a href="#">IPA's Staff Safety &amp; Security Manual</a> at all times while traveling.</li> <li>4. Should travel plans change while traveling, contact IPA's designated travel agency for assistance in changing reservations as soon as practical, and coordinate with the local Country Office, as needed. <ol style="list-style-type: none"> <li>4.1. If travel arrangements were not made through IPA's designated travel agency, work directly with the Assignment Supervisor to obtain approval for itinerary changes. A written justification for change must accompany the change fee on the expense report.</li> </ol> </li> <li>5. In case of an emergency while traveling, follow the protocol as outlined in IPA's <a href="#">Staff Safety &amp; Security Manual</a>.</li> </ol>
<b>Actor</b>	<b>Action: Post- Travel</b>
Employee	<ol style="list-style-type: none"> <li>1. If required by the Assignment Supervisor, prepare a trip report. See Annex 4 Trip Report for a template report that may be used.</li> <li>2. Prepare and submit an expense report for all travel-related expenses within 30 days of completion of the trip. The expense report should be submitted to the finance team of the office where the traveler is employed. U.S. employees will request reimbursement through IPA's global finance platform. <ol style="list-style-type: none"> <li>2.1. See <a href="#">Procedure 3 Reimbursable Travel Expenses</a> for a list of travel expenses and required backup documentation for reimbursement to aid in expense report preparation.</li> </ol> </li> </ol>
Assignment Supervisor	<ol style="list-style-type: none"> <li>3. Review the expense report, ensuring listed expenses comply with the requirements of this Global Travel Manual and are supported by the required backup documentation.</li> <li>4. Approve the expense report if each expense line complies with IPA policy. Return the expense report if any expenditure is lacking required backup documentation or is not reimbursable per IPA policy.</li> </ol>
Finance	<ol style="list-style-type: none"> <li>5. Issue expense payment when Assignment Supervisor approval is received if expenses are adequately substantiated by receipts and comply with IPA policy.</li> </ol>

## 4. Guidance

This section describes guidance to aid in the understanding and implementation of this procedure and does not include mandatory requirements.

- 4.1. There is no guidance associated with this procedure.

## Procedure 3: Reimbursable Travel Expenses

### 1. Purpose & Scope

- 1.1. This procedure lists travel expenses that are reimbursable to the IPA traveler and what documentation must accompany each type of expense in order to receive reimbursement.
- 1.2. The purpose of this document is to ensure that employees are aware of reimbursable travel expenses and supporting documentation requirements.
- 1.3. Travel funded by a Country Office or by a project, follows the expense-related policies of the Country Office and/or project funding the travel.

### 2. Roles & Responsibilities

- 2.1. Travelers are responsible for ensuring that travel expenses for which reimbursement will be sought are within the categories listed in this procedure and that each expense is accompanied by the required documentation.
- 2.2. The Chief Financial Officer is responsible for determining which types of travel expenses IPA will reimburse and for outlining the documentation requirements for each type of expense.

### 3. Reference Information

Reimbursable Expenses	Condition/Additional Information	Required supporting documentation for expenses >\$25
<b>Airfare</b>	Book using the most direct, expeditious and economical fare.	Itinerary showing routing and class of service. Cost comparison if route or duration of stay is modified for personal reasons. If IPA travel agency is not used, must also include travel approval and rate comparison.
<b>ATM transaction fees</b>	Not to exceed \$50 per 2-week trip	Copy of bank and/or credit card statement showing the transaction fee, corresponding to travel dates and locations.
<b>Business-related taxi fare</b>	Including reasonable and customary tips and only if movement is directly in support of travel purpose objectives. A taxi log should be kept with dates, fares, origins, destinations, and purpose.	Claimant must show date, origination, destination, and business purpose of travel; this information can be documented in a taxi log.
<b>Business meals</b>	Must not include alcohol purchases.	Detailed receipt showing what was consumed, name and title of attendees/participants, and purpose of meeting. If under \$25, receipt is not required but must confirm that no alcohol or other unallowable items were consumed.
<b>Car rental</b>	Should only be used when cost for rental is lesser than alternative forms of transportation or when logistics requires rental.	Business purpose stating why a car rental was the most cost-effective, i.e., visit to multiple partners in various locations where taxi service is unavailable or would exceed the cost of the car rental.
<b>Communication expenses</b>	Should be incurred using the least expensive and cost-efficient method.	Receipt for data and/or airtime purchased if over \$25.
<b>Immunization/vaccinations</b>	Required immunizations not covered by the traveler's health insurance policy are reimbursable at cost.	Receipt from medical facility showing date services were provided and that such services are related to a physical examination, immunizations, vaccinations, etc.



<b>Excess baggage, including second checking fee</b>	Applicable when directly related to the transportation of IPA property, equipment at the request of IPA or when travelers are moving to post and have been granted a baggage allowance (see IPA Employee Handbook for relocation allowances).	Airline receipt showing number of excess baggage items, weight, and charges. Include a detailed justification describing what the excess baggage contained.
<b>Foreign transaction fees</b>	Fees charged by credit cards or banks related to foreign transactions incurred while paying for other travel expenses.	Credit card and/or bank statement showing foreign transaction fees aligning to the travel dates and location.
<b>Global Entry</b>	Reimbursable for employees whose job requires or is expected to require, frequent international to/from the United States and when approved by their supervisor.	Receipt documenting the name of the traveler, duration of Global Entry validity, and fees.
<b>Ground transportation (bus, rail, etc.)</b>	If movement is directly in support of travel objectives.	Show date, origination, destination, and, if not obvious, business purpose of travel; this information can be documented in a log.
<b>Lodging</b>		Hotel folio showing the name of guest, dates of lodging, daily rate, and applicable taxes.
<b>Meals</b>	When per diem for meals and incidentals is not provided, meals can be itemized in the expense report or grouped together in one expense line when accompanied by a log showing meal cost and date. Must not include alcohol purchase	Receipts are required for meals >\$25. Include meal log when multiple meals are included in one expense report line.
<b>Per Diem</b>	Deductions for travel days and provided meals must be applied according to the Global Travel Policy. If per diem is collected, meals may not be claimed separately.	Per Diem Calculator must be attached to expense report.
<b>Personally-owned vehicle (POV) mileage</b>	The employee is responsible for all vehicle operating costs when the employee's personal vehicle is being used for IPA travel. Drivers are responsible for adhering to legal requirements for vehicle use including having a driver's license, registered vehicle, and third-party insurance.	Document origination (address), destination (address), trip mileage, and purpose of trip. Include a printout of the GSA rate at the time of travel. <a href="http://www.gsa.gov/portal/content/100715">http://www.gsa.gov/portal/content/100715</a>
<b>Visa/Passport photos/processing fees</b>		Whether using an expediter or obtaining visa directly from the Consulate or Embassy, collect receipts that are issued that show the name of the traveler, dates a visa is valid, and related fees.

## 4. Guidance

This section describes guidance to aid in the understanding and implementation of this procedure and does not include mandatory requirements.

- 4.1. There is no guidance associated with this procedure.

## Procedure 4: US Government-funded Travel

### 1. Purpose & Scope

- 1.1. The purpose of this procedure is to document regulations that are applicable to U.S. Government-funded travel, including the Fly America Act.
- 1.2. This procedure implements the policies on U.S. Government-funded travel stated in the [Global Travel Policy](#).
- 1.3. The regulations outlined below are applicable for U.S. Government-funded grants, subgrants, contracts, and subcontracts and therefore must be taken into consideration when booking travel under those types of agreements.

### 2. Roles & Responsibilities

- 2.1. Employees are responsible for confirming if their travel is funded by the U.S. Government and are responsible for either informing IPA's designated travel agency that the travel is U.S. Government-funded or, if booking travel independently, for ensuring their flights are in compliance with the applicable regulations.
- 2.2. IPA's designated agency is responsible for asking travelers if travel is U.S. Government-funded and, when applicable, for booking travel that is in compliance with federal travel regulations.

### 3. Reference Information

The following are applicable to travel funded by the U.S. Government:

#### Approvals

**Prior Approval:** For travel funded by the U.S. Agency for International Development (USAID), traveler should confirm with Grants team if prior approval in writing from the Agreement Officer (AO) is needed.

**Country Clearance:** Some contracts and/or agreements may require written notification from the Contracting Officer or Agreement Officer of clearance of any employee sent outside the United States to perform duties under the contract/agreement. Contact the Contracting Officer's Representative to verify the mission-specific requirements.

#### Physical Fitness certification:

- For USAID-funded overseas contract assignments of less than 60 days, the traveler must provide an annual medical certification, or doctor's note, that s/he is healthy to travel. If a doctor's note is used, it may be issued by the individual's personal physician in conjunction with her/his annual physical check-up.
- For USAID-funded overseas contract assignments of 60 days or more, the traveler is required to undergo a one-time medical examination by a licensed physician who completes the Contractor Employee Physical Examination Form.

**Business Class Exceptions:** USAID policy that business class air accommodations may be justified by one of the reasons cited in [Federal Travel Regulation 301-10.121](#) when travel is in excess of 14 hours and when authorized by the Agreement Officer or Contract Officer.

## Carrier Restrictions

### Fly America Act:

Per the Fly America Act, all airfare funded by the U.S. Government must be booked on U.S. flag air carriers ("Fly America Act"), to the extent that service by such carriers is available. This includes tickets booked on code-shared flights when the ticket is issued using the U.S. carrier's flight number.

### The US-EU Open Skies Agreement:

The Fly America Act provides an exception to the U.S. carrier rule, "when the transportation is provided under a bilateral or multilateral air transportation agreement to which the United States Government and the government of a foreign country are parties, and which the Department of Transportation has determined meets the requirements of the Fly America Act."

The US-EU Open Skies Agreement has been determined to meet the requirements of the Fly America Act and as a result, US Government-funded air travel may take place on European Community airlines (EU carriers) when traveling (1) between the U.S. and any point in an EU Member State or (2) between any two points outside the United States.

### Fly America Act Exceptions:

- No U.S. carrier flies to the final destination.
- Flying on a U.S. carrier would require at least two more plane changes than if a foreign carrier were used.
- Flying on a U.S. carrier would take at least 6 hours longer than if foreign carrier were used.
- Flying on a U.S. carrier causes passenger to wait at least 4 hours at an overseas connection point
- For flights of less than 3 hours, flying U.S. carrier would take 2 times as long as flying foreign carrier
- Flying U.S. carrier causes total trip to be extended by more than 24 hours than if foreign carrier was used
- No coach seat is available on U.S. carrier
- U.S. carrier switches passenger to flight on foreign carrier involuntarily
- Travel originates in a foreign country and is destined for a foreign country, i.e., travel between two points abroad.

## 4. Guidance

This section describes guidance to aid in the understanding and implementation of this procedure and does not include mandatory requirements.

4.1. Additional information about U.S. government regulations can be found in these locations:

- [Federal Travel Regulations](#)
- [Fly America Act Guidelines](#)
- [Foreign Affairs Manual: 14 FAM 583- Use of U.S.-flag and Foreign Air Carriers](#)

## **Annexes**

**Annex 1: Travel Agency Request Form**

**Annex 2: Travel Request Form**

**Annex 3: International SOS Basics and Card**

**Annex 4: Trip Report Template**

**Annex 5: Physical Fitness Certification- assignments under 60 days**

**Annex 6: Physical Fitness Certification- assignments over 60 days**

**Annex 7: Per Diem Calculator**

**Annex 8: Traveler Resources**

**Annex 9: Travel Expense Receipt**