



CFP TRAVEL POLICY

TITLE: Travel Policy Policy for Policies	Responsibility: Treasurer
Type of policy: ADMINISTRATIVE & INSTRUCTIONAL	EFFECTIVE DATE: Board Approved 10-21-24
	Revised 9-09-24

PURPOSE: Revise the Travel Policy to use the General Services Administration (GSA) Federal per diem for reimbursement for meals. The subsidy for meals during approved CFP travel would be covered for all constituencies. The Board has developed this policy to provide guidance for CFP members who seek Board approval for funding from the Conference to participate in events. Financial assistance should only be requested when other funding resources for members are inadequate or unavailable. It is understood that Conference funds are limited. **Every effort should be made to fund travel utilizing employer resources.**

SCOPE: The policy changes the procedure to obtain reimbursement for meals for all constituencies, using the GSA Federal per diem.

Definition of Terms: GSA Federal per diem- A system used nationally to calculate the **Per diem** rates look-up Allowances for lodging, meal and incidental costs while on official government travel.

POLICY: When approved, the Conference will subsidize travel to the Executive Board and other approved meetings in accordance with the following rules and guidelines:

- The subsidy may cover airfare, ground transportation (e.g., taxi, train, shuttle bus), meals and/or hotel expenses up to a limit of \$1,200.00 per member per meeting other than at the CFP Biennial Meeting.
- Board members may apply for amounts in excess of \$1,200.00 only under extraordinary circumstances. Board approval is required before any subsidies in excess of the \$1,200.00 limit will be paid. An exception is made for the Board meeting that occurs during the CFP Biennial Meeting which occurs over several days; the subsidy limit for this meeting is \$1,400.00.
- Individuals requesting financial support must notify the Treasurer in writing at least 30 days

in advance of the scheduled meeting of the intent to apply for a travel subsidy. The notification, on a form approved by the Treasurer, must include the reason for the subsidy request and an itemization of estimated expenses. A Standing Committee Chair who is required to attend a Board meeting in person may designate an alternate to attend the meeting in their place. When this situation arises, the alternate may apply for the travel subsidy.

- Applicants are expected to travel at the lowest fare that provides reasonable schedules and logical routes. Subsidies may not be used to upgrade airline tickets or pay fees for earlier departure times.
- Applicants are required to stay at the hotel contracted by the Director for the meeting unless staying at home or with friends/family. In the event the stay is elsewhere and subsidy support is requested, Director approval is required before the subsidy will be paid. Additional charges incurred because of a spouse/guest sharing a room will not be subsidized.
- The subsidy for meals during approved CFP travel will be covered in accordance with the GSA Federal Per Diem (<https://www.gsa.gov/travel/plan-book/per-diem-rates>) and in accordance with the CFP Travel Policy. The cost of the meal(s) and taxes up to daily limit allowed by the federal per diem rate for the meeting location will be reimbursed, minus any CFP-provided meals. Meal receipts do not need to be submitted, and any costs outside the per diem rate for meals will not be reimbursed.
- To receive a subsidy, Board members must submit a reimbursement request to the Executive Treasurer on a form approved by the Executive Treasurer, along with a copy of each receipt, within 30 days following the meeting.

REFERENCES: See GSA Federal Per Diem <https://www.gsa.gov/travel/plan-book/per-diem-rates>

ATTACHMENTS: NA

Revised Board Approved: 10/21/24