



# IODA Travel & Expense Policy

## September 2020

### Overview

The IODA Travel Policy was established in December 2016 and approved at the 2017 MYM. It was amended in August 2019 and again, due to COVID-19 in August 2020.

As travel is the largest variable cost centre for IODA, the purpose of this policy is to centralize and control travel costs for all IODA committee members and technical officials and to streamline the process by involving a 3rd party travel agency to manage and book the flights.

IODA has engaged a travel agency, Uniglobe Enterprise Travel Ltd based out of Toronto, that specializes in booking travel with several professional sport organizations. Uniglobe has a 24/7 hotline that can handle any requests to change or cancel flights after work hours. The TA follows our Travel Policy to book flights. The role of the Secretary General is to facilitate and communicate the booking of flights and manage the financial payments for travel.

The Executive Committee only can purchase flights for IODA business as per the IODA Travel Policy and be reimbursed for their Expense.

Reimbursement for Expenses is managed by the Secretary General. To claim expenses an Expense Form with the currency of the expense is to be submitted with the original receipts.

### Expense Policy

1. This policy sets out rules and guidance for the Executive Committee, Committee Members, IODA Officials (as described in World Championship Condition 19 and Continental Condition 20), and Staff on how to claim their expenses while carrying out work on behalf of IODA.
2. Executive Members, Committee Members, IODA Officials, (as described in World Championship Condition 19 and Continental Condition 20), and Staff are expected to act honorably and sensibly within the spirit of this policy and are expected to arrange their travel and accommodation in the way that is most cost effective for IODA.
3. The rates and allowances in this policy are intended to provide a reasonable standard of travel, accommodation, and subsistence consistent with IODA's position as a non-profit organization that reports to its' Members. Rates are kept under review, and from time to time, the Executive will make changes to the rates quoted in this policy. These changes will be notified to all members of the Executive as well as IODA Committee Members and IODA Officials.
4. IODA shall reimburse members of the Executive, Committee Members, IODA Officials, (as described in World Championship Condition 19 and Continental

Condition 20), and Staff on the production of receipts satisfactory to IODA, for all reasonable expenses actually and necessarily incurred in relation to their IODA work. Credit card receipts will not be accepted.

5. Expenses will only be paid if approved by IODA. If submitters are uncertain as to whether an expense will be reimbursed, they should seek clarification from the Secretary General before the expense is incurred.
6. The IODA's prior approval is required for any expense greater than US \$100 incurred while travelling on IODA business, but not defined as travel or accommodation. IODA may contact the submitter to seek clarification over the expenditure. Reimbursement of expenses may be delayed in these circumstances.
7. Should further clarification or advice be required with regards to this policy, please contact the Secretary General or IODA Treasurer.
8. All expenses are to be approved by the Secretary General and/or the IODA Treasurer. Providing there is no clarification required in the expense claim, payment of expenses will be targeted at 15 Days from the date of submission to the Secretariat, if paid through online banking or wire transfer. If the expense amount is low, then they may be paid in cash at the earliest opportunity.
9. The expenses incurred by Executive Members, Committee Members, IODA Officials (as described in World Championship Condition 19 and Continental Condition 20), and Staff at an IODA Event or Meeting, are to be paid in cash, if possible, at the time when the event or meeting takes place.

### Submitting Expense Claims

10. Executive Members, Committee Members, IODA Officials, (as described in World Championship Condition 19 and Continental Condition 20), and Staff must submit their claims for reimbursement of expenses (except mileage) electronically by email to [sec\\_gen@optiworld.org](mailto:sec_gen@optiworld.org) with scanned or photographed copies of the receipts. The original receipts should be mailed, or hand delivered to the Secretary General if possible, for auditing purposes.

If a receipt is misplaced, every reasonable effort should be made to obtain a replacement copy from the supplier. If the receipt is not located, the circumstances and the details of the purchase should be explained on the claim form or in the covering email.

11. All claims should be made on the appropriate **IODA Expense Form** in the currency of their expense. Separate forms should be used for different events and in a difference currency, for example, SAMS20 (USD), and MYM2020 (EUR). Blank expense forms in USD or EUR are available upon request from the Secretary General or Regatta Secretary.
12. Executive Members, Committee Members and IODA Officials, (as described in World Championship Condition 19 and Continental Condition 20), are required to submit their claims directly to the Secretary General within one calendar month in which the work is carried out. Expenses will be paid direct into a submitters bank account unless agreed otherwise by the Secretary General, Treasurer, and the submitter.

### Travel Management Company

1. IODA has appointed a travel management company, UNIGLOBE. Air travel is to be booked through IODA's contracted travel management company, or unless agreed to by the Secretary General. A copy of a person's passport must be submitted to the travel management company prior to any booking of flights or travel arrangements.
2. All airline travel should be booked at the earliest opportunity as cheaper rates can be obtained. Bookings should be made at least three months in advance for peak season travel and 2 months ahead for off-peak travel if possible.
3. Bookings through the travel management company shall be made first by sending a Travel Request Form to the Regatta Secretary and/or the Secretary General who will instruct the Travel Agency to provide a number of flight options based on the IODA Travel Policy. The options will be reviewed by the traveler to determine the best option. All airfare or hotel costs shall be approved by the Secretary General and/or IODA Treasurer. Flight options can be presented by the traveler for comparison purposes. If the flight option cannot be booked by the TA, then it can be considered and booked if it satisfies the Travel Policy.
4. Executive Members, Committee Members, IODA Officials, (as described in World Championship Condition 19 and Continental Condition 20), and Staff are responsible for cancelling their own bookings prior to the flight, by informing the Secretary General or Regatta Secretary or if not available, with the TA directly through the 24/7 Emergency Hotline. Cancellations should be made as soon as possible.

**Air Travel**

1. Economy Class must be used for all airline flights. If the single journey comprises more than one airline flight, Economy Class tickets must be used for the different flights.
2. When booking flights with more than one flight segment, the lowest possible layover time should be obtained if possible, providing the increase in cost is not more than 20% of the cost of the airline ticket.
3. For Executive Members and Staff Members only, for single flights longer than eight hours, extra leg room may be purchased for the longest legs of the journey. Consideration will be given for IODA Officials (as described in World Championship Condition 19 and Continental Condition 20) on an individual basis.
4. For Executive Members only, they may purchase their own airline tickets in accordance with the IODA Travel Policy and submit the expense for reimbursement. The Secretary General and /or the IODA Treasurer is to approve the flight expenditure prior to purchase.
5. IODA will provide a reasonable degree of comfortable travel within the limits of what the "economy" fare allows but will not incur any additional costs to maximize personal Frequent Flyer Air miles or enabling service upgrades. IODA will make every attempt to use a person's preferred and partner airline so that upgrades in baggage and seating assignments can be obtained free or at a low cost, as long as the cost is similar to those of other airlines.
6. For travel more than 24 hrs, or when a connecting flight is the following day, IODA will pay for the hotel accommodation booked either through the travel management company or through the Secretary General, according to IODA hotel policy rates
7. The Travel Agency is to book all flights with preferred seat assignments, when possible.
8. The Travel Agency is to book all flights with a minimum of one checked baggage.
9. Due to COVID-19 and the uncertainty of worldwide travel, IODA will purchase Flight Cancellation Insurance for travelers on IODA Business.
10. IODA will not purchase Travel Medical Insurance for travelers on IODA Business. It is the responsibility of the traveler to carry Travel Medical Insurance while outside their country of residence.

### Taxi & Public Transit

1. Transportation to and from the airport either by car, taxi or public transit shall be reimbursed for all IODA business except IODA Events. For IODA Events, transport from home to airport of departure flight shall be paid by IODA. The Event Organiser is responsible for transport from airport to venue and return following conclusion of IODA Event.

### Mileage Allowance

1. Mileage allowance is payable for the use of a submitters own car. The allowances are based on the standard US government rate, which is subject to change from time to time. The current rates in US and their Euro and GBP equivalents are as follows:

Mileage Allowance	US	Euros	GBP
Per KM	0.36	0.31	0.27
Per MILE	0.57	0.49	0.44

2. Rates for rental cars are available upon request from either the Secretary General or the Travel Agency but must be approved before booking.
3. Mileage can only be claimed where it is the most cost-efficient way of travelling or where rail/air travel is not available.
4. Expenses incurred in respect of tolls, parking and ferries may be claimed.

### Taxi Fares

1. Where practicable, public transport should be used rather than taxis. Taxi fares will be reimbursed in the following circumstances:
  - where a taxi will be cheaper than public transport or public transport is unavailable;
  - if a transfer between two different airports is required to make a connecting flight the same day, and time allowance to cross from one airport to another and to check in to new flight is not sufficient to permit reliability on public transport or, if travel from one airport to another is required during rush hour city traffic;

- if the journey has to be made before 8am or if deemed not safe to travel alone on public transport (especially for females travelling alone);
  - if carrying heavy luggage or IODA equipment;
  - where there is a disability which affects mobility, or other mobility issues which the submitter is aware of and has agreed extenuating travel arrangements; and
  - it is not possible and or appropriate to hire a rental car.
2. Taxi fares will only be reimbursed where it is clearly stated on the claim the reason for getting a taxi and the journey taken. This must be supported by a receipt.

### Hotel Accommodation

1. Hotel accommodation for Executive Members, Committee Members, IODA Officials (as described in World Championship Condition 19 and Continental Condition 20) and Staff must be booked through the travel management company or the Secretary General. A booking confirmation will be provided by the TA or the Secretary General and this is to be presented upon checking into the hotel.
2. The maximum amount agreed with IODA is:

ROOM TYPE	Room only, incl Taxes US\$	Bed and breakfast, incl taxes US\$
Standard One Person	175	200
Standard Double (to be shared by 2 IODA people)	225	250

3. When a bed and breakfast rate is booked, the cost attributable to breakfast does not matter so long as the total is within the bed and breakfast limit in the table. When a room only rate has been booked, breakfast may still be taken in the hotel provided the total for the room plus breakfast is within the bed and breakfast limit in the table, and the breakfast is charged on the hotel bill. Alternatively, when a room only rate is booked, breakfast may be taken outside the hotel at a cost that totals the room plus breakfast rate.



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### Other Accommodation

4. Executive Members, Committee Members and IODA Officials, (as described in World Championship Condition 19 and Continental Condition 20), and Staff staying with friends or relatives may claim for evening meals and breakfast, if the meals are not provided by their host. Claims must be supported by receipts.

### Meals

1. Executive Members, Committee Members, IODA Officials, (as described in World Championship Condition 19 and Continental Condition 20), and Staff will be given up to \$50US or Euro equivalent per diem for meals in the amounts specified below.
  - Breakfast – \$10US
  - Lunch - \$15US
  - Dinner - \$25US
  - Incidentals (Snacks) - \$10US

A Meal allowance will not be paid while attending IODA Events where the meals are provided by an Event Organizer or for IODA Meetings when paid by IODA.

2. For Executive Members, Committee Members, IODA Officials, (as described in World Championship Condition 19 and Continental Condition 20), and Staff, up to \$US25 will be provided on a travel day meals/expenses to an event or meeting and another \$US25 for travel day meals/expenses departing from an event or meeting.
3. Unless approved by the IODA Executive, reimbursement for alcoholic drinks will not be allowed.

### Miscellaneous

1. Executive Members, Committee Members, IODA Officials, (as described in World Championship Condition 19 and Continental Condition 20), and Staff can claim up to \$10US /day or Euro equivalent while attending an IODA event or meeting to cover internet/mobile expenses.
2. **For IODA Executive Members, Committee Members, IODA Officials, (as described in World Championship Condition 19 and Continental Condition 20), and Staff, IODA will pay for travel visas for IODA Meetings.**



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3. Executive Members, Committee Members, IODA Officials, (as described in World Championship Condition 19 and Continental Condition 20), and Staff shall purchase their own travel health insurance while on IODA business outside their country of residence.
4. Executive Members and Committee Members shall provide an emergency contact name, telephone number and email address to the Secretary General. IODA Officials are to provide this information to the Regatta Secretary.
5. Airfare for partners travelling with an Executive Member, Committee Member and IODA Official (as described in World Championship Condition 19 and Continental Condition 20), and Staff can book their flights through the travel management company, however, the ticket and booking fee will not be paid for by IODA.
6. Any exception to this policy needs to be approved by the President or Executive Committee.



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**IODA Travel Request Form**

*Name:*

*Date:*

Personal and Billing Information	
First Name (Name in Passport)	
Last Name (Name in Passport)	
E-mail	
Contact Telephone Number	
IODA Cost Centre (Circle one)	Events/Technical/Administration/Other
Reason for Travel	
Travel Details	
Preferred Airline	
Departing City	
Departure Date	
Return City	
Return Date	
Aisle or Window Seat	
# of checked bags	
Special Assistance/Requests	
Passport Number	
Nationality	
Passport Expiry Date	
Place of Issue	
Sign off	
Requested by	
Approved by	
Approval Date	

\*\* For travel requests email this form to: [sec\\_gen@optiworld.org](mailto:sec_gen@optiworld.org) and/or [regattasecretary@optiworld.org](mailto:regattasecretary@optiworld.org)

<i>Date Reservation Confirmed</i>	<i>Itinerary Number</i>	<i>Booking Number</i>	<i>Rate Confirmed</i>