

CONFERENCE OF RADIATION CONTROL PROGRAM DIRECTORS, INC.

Travel Guide

(Amended February 14, 2017)

This document is designed to be a companion document to the CRCPD Travel Regulations. The regulations identify specifically what is required or allowed by the CRCPD when in travel status. This guide is intended to expand or assist in the use of the regulations whether you are responsible for planning the meeting or are authorized to attend a meeting on behalf of CRCPD.

Planning a Meeting

The need for a meeting to conduct CRCPD business is usually determined by the CRCPD Chairperson, a member of the Board of Directors, the chairperson of one of the CRCPD's Councils, the chairperson of a working group, or the Executive Director. When the need for a meeting has been identified, careful planning is required to assure economy and efficiency for the CRCPD. In support of the CRCPD mission statement, *A Partnership Dedicated to Radiation Protection*, and our funding source requirements, it is crucial that advance notice of potential meetings be communicated to all persons who need to attend. For CRCPD working groups, this includes advisors, resource persons, consultants and OED staff.

The following should be considered when planning CRCPD meetings:

Board policy regarding CRCPD sponsored meetings - All meetings planned by a CRCPD sponsored entity shall take advantage of economical travel. Exceptions may be dictated by provisions outlined in the notice of awards issued to CRCPD.

1. **Date** - The meeting planner should poll potential attendees regarding available dates for a future meeting. Every effort should be made to accommodate all persons who need to attend. When the date is finalized, the meeting planner is responsible for notifying potential attendees of the confirmed date(s) of the meeting. The Board has revised the meeting request form to include a check box as a mechanism to ensure this procedure has been followed.
2. **Location** - The planner should make every effort to locate the meeting in a place that would be the most economical to the CRCPD while striving to meet the goals and objectives of the CRCPD Strategic Plan. Consideration should be given to the travel distance of those expected to attend. It is generally advantageous to hold the meeting in the city of one or more of those persons expected to attend.

Since Federal funds cannot pay expenses for those persons attending a meeting in their hometown, the Board of Directors has adopted the policy which allows the traveler to be reimbursed, out of CRCPD funds, for a portion of his/her expenses. Therefore, the traveler is authorized 50% of the M&IE rate per day of the meeting and mileage cost at the current GSA mileage rate over and beyond normal travel from residence to work

station and return per day. Justification for mileage charges shall be adequately explained on expense voucher.

- This does not include mileage reimbursement for transporting members to eating facilities unless adequate eating facilities are not available at meeting location or within comfortable walking distance. If it is the personal choice of the attendees to eat at facilities other than those provided within walking distance, the cost for transportation shall be paid out of the M&IE.
- Mileage reimbursement is allowed when, in lieu of taxi/limo charges, a local member provides airport transportation to other meeting attendees.

Since most meetings of the CRCPD have one or more Federal representatives who need to attend, consideration should be given to holding a meeting in the area of these Federal representatives, particularly if two or more Federal persons are expected to attend. In most cases, this would be in the Washington, D.C. area.

Another consideration in location of a meeting is to hold the desired meeting in conjunction with another meeting. However, careful attention must be given to such circumstances, since the potential exists for one or the other meeting being "slighted" in favor of the other meeting. Generally, it is not a good policy to hold meetings in conjunction with other meetings. However, there may be circumstances in which substantial savings and/or direct benefit to the CRCPD can be obtained with a meeting being conducted in conjunction with another meeting, when the attendees would be at both meetings. Careful planning is needed to assure that one meeting does not disrupt or interfere with the originally scheduled meeting. Usually, planning for such related meetings requires a one or two day meeting before or after the originally scheduled meeting. If a CRCPD meeting in conjunction with another meeting is desired, prior approval by the CRCPD Chairperson or Council Chairperson must be obtained, and funding verified through OED in ample time to take advantage of government/convention rates and reduced airfare costs.

In support of Public Law 101-391 dated September 25, 1990 regarding the Hotel Motel Safety Act of 1990, meeting planners are encouraged to arrange meetings in facilities that are fire-safe when commercial lodging is required. The U.S. Fire Administration maintains a website that offers information relative to the list of FEMA approved accommodations (<http://www.usfa.fema.gov/hotel/index.cfm>).

3. ***Lodging/Per Diem*** - Many lodging facilities offer a special rate for government employees. Realizing the maximum lodging rate that is reimbursable under the lodging-plus per diem system, the planner should make every effort not to exceed that amount for lodging (the total listed for a given area does not include tax). If there are no lodging facilities that will agree to give GSA rates, and the location of the meeting cannot be changed, the meeting planner may exceed the GSA rate, i.e. combined meeting at a facility where the only rates available exceeded the maximum GSA rate. The working group chair shall make a strong effort to inquire if government rates would be available

at the headquarters hotel, or at another facility within walking distance. Justification must be submitted to the appropriate council chairperson with the meeting request and also forwarded to the OED.

If a special meeting room is required, the meeting planner is encouraged to locate a meeting room for minimal or no costs. Facilities may offer such rooms free if certain conditions are met, i.e. "x" number of lodging rooms are utilized, "x" amount of food/beverages are consumed, etc. However, when meeting room costs are deemed necessary, prior approval must be obtained from the Office of Executive Director (OED) and included on the travel authorization. The person arranging the meeting may either seek reimbursement on his/her travel voucher or work out alternate arrangements for payment with the OED travel coordinator.

Listed below are other miscellaneous meeting items that may be authorized provided prior authorization is obtained from the OED travel coordinator:

- *Meeting Support Items such as:*
 - Audio-visual equipment.
 - Business center services, i.e. facsimile, copies, etc)
 - Long distance calls made from the meeting room that are CRCPD business related (if the need arises during the meeting, please contact the OED travel coordinator to arrange for the most economical method.
 - Internet/computer hookup in order to access CRCPD business related info. For clarification, cost to check email messages from office/home are covered by per diem and are not considered "special allowances."
- *Refreshments* - Costs for refreshments are included with the per diem allowed to attend the meeting and will not be paid by Federal funds .
- *Meeting Registration Fees* -- CRCPD may authorize the payment and/or the reimbursement of registration fees to meetings that are not sponsored by the CRCPD. For clarification, this does not include reimbursement for the CRCPD annual meeting.
- *Other miscellaneous costs*
 - Long distance calls that are CRCPD business related that are made from lodging room -- The cost and justification must be included with on travel voucher under "special allowances." Receipt must be attached to voucher.

Agreements for Lodging Facilities - The meeting planner is responsible for securing lodging arrangements. In instances where a contract/agreement is required, the meeting planner shall forward the document to OED. OED has the responsibility to review and sign contracts/agreements that obligate the use of CRCPD funds. OED will make available to the meeting planner a copy of the final negotiated agreement/contract. The meeting planner and/or the person in charge of the meeting who is on site during the meeting is responsible for seeing that the conditions of the contract/agreement are met.

Another consideration in obtaining lodging is the proximity of the lodging facility to other eating establishments, since most persons attending will probably not have local transportation available. Travelers are expected to pay for public transportation to eating facilities out of their "incidental expense" reimbursement when they choose not to eat at facilities that are located within walking distance.

Reduced Per Diem --The meeting planner should keep the following in mind when planning a meeting: CRCPD may, in individual cases or situations, authorize a reduced per diem rate under certain circumstances, such as when lodging and/or meals are obtained by the traveler at a reduced cost or furnished to the traveler at no cost or a nominal fee, or when for some other reason the subsistence costs to be incurred by the traveler can be determined in advance. The CRCPD will consider any known factors that will cause the traveler's subsistence expenses in a specific situation to be less than the applicable maximum rates prescribed. If it can be determined in advance of the travel, that such factors are present, the CRCPD may authorize a reduced rate that is commensurate with the known expense levels. Such reduced rate authorized on the travel authorization shall be the per diem rate payable on the travel voucher without receipts and/or itemization by the traveler.

- 4. Open/Closed Meetings** -- Meeting planners are encouraged to keep the following Board policies in mind and to communicate to attendees especially when meetings or parts of the meeting will be closed.

"It is the *general* policy that all meetings, such as committee/task force meetings etc., of CRCPD shall be open. However, when it has been established that enforcement activities or other sensitive issues are to be discussed at a meeting of CRCPD, and it is determined that it would be in the best interest of the organization to restrict attendance to the meeting, then CRCPD may hold closed meetings versus closed meetings."

a. *Open Meetings:*

In general, the committees of the CRCPD shall have open meetings and welcome input from all interested parties. (*See General VIII for additional information*) (*Amended July 2000*).

b. *Closed Meetings:*

There are circumstances in which a committee may have an entire meeting limited to "committee members only." There also can be meetings where certain agenda items are discussed in a "committee members only" session. The circumstances that would necessitate closed meetings or closed sessions include, but are not necessarily limited to: a) a request of a committee to review certain documents for "states only" comments, b) documents to be considered by the committee that are preliminary in nature and which could give unfair business advantage to individuals who are privy to the preliminary information, and c) consideration by the committee of issues that pertain to regulatory enforcement actions which may be of a confidential nature. (*See General VIII for additional information*). (*Amended July 2000*).

5. **Transportation**

Distant travel - The most frequently used method of transportation for distant travel is common carriers (airlines, railroads, or buses). Occasionally, a POV may be used. Under unusual circumstances, rental vehicles may be required. This mode of transportation shall appear on the travel authorization. When POV becomes necessary, prior approval shall be obtained from the OED and recorded on the travel authorization. Only under extreme circumstances, may POV be verbally authorized.

When traveling by commercial airlines, the Board of Directors has adopted the following policy that states:

As related to flight arrangements, the OED shall make every effort to obtain the lowest airfare available for travelers funded by the CRCPD, including nonrefundable tickets. In order to obtain such low airfares, a penalty may be incurred should tickets already issued be changed or canceled. It is policy of the Board of Directors that the CRCPD should only pay such assessed penalties if the change or cancellation of flight arrangements are caused by the CRCPD, or there is a personal emergency for the traveler. "Emergencies" are personal or family illness or death. If such emergency occurs, the traveler shall submit to the OED a written justification in support of the change or cancellation of a ticket. OED will work with the airline within their established policies to get the best deal for both the traveler and the CRCPD. A change for non-CRPCD business purposes is not considered a personal emergency, therefore may result in the additional cost being paid by the State or individual. Exceptions can be approved by the Board of Directors. *(Amended March 2003.)*

Changes to flight arrangements -- Should a change in flight arrangements become necessary, it is the responsibility of the traveler to call the airlines "prior to departure" and advise of their need to cancel or alter flight arrangements. OED travel coordinator must also be notified in order to determine if any portion of the ticket can be used at a later date. Failure to contact the airlines and/or OED may result in the traveler and/or state agency having to pay associated travel costs. For clarification, when the change is due to a situation other than one caused by CRCPD or a personal emergency, the traveler or state may be responsible for any charges that occur as a result of the change. *(Amended March 2003).*

POV may be approved at the current GSA mileage rate, particularly if shown to be of benefit to the CRCPD. (Example: two or more persons traveling from same location under CRCPD authorization.) However, POV may also be approved for the convenience of the traveler, but reimbursement when using a POV for personal convenience cannot exceed common carrier cost. At the time OED approves the use of POV, OED will also provide the traveler with the airfare that would have been available along with a cost comparison form. The cost comparison must show the total cost had the traveler flown versus the total cost to drive a privately-owned vehicle. This form must be submitted along with the travel authorization and appropriate receipts. Reimbursement shall not exceed the total common carrier cost had the traveler flown. For clarification, if the traveler's expenses are less than the common carrier costs, OED will reimburse the lesser costs. If there is a need to travel

a day early or a day late due to the distance, the stopover point shall be noted on the voucher as well as the lodging cost. If no lodging cost was incurred, the reason for such shall also be noted on the expense voucher.

Rented Vehicles -- CRCPD restricts the use of rented vehicles due to increased liability to the organization. CRCPD may authorize the use of rented vehicles when other means of transportation are not available, or when such use would be advantageous to the traveler's mission for CRCPD. Prior approval must be obtained. If an emergency situation occurs and prior approval cannot be obtained, justification shall accompany the traveler authorization. Lack of prior approval may result in the traveler having to absorb the cost. Special attention should be paid to Travel Regulations, specifically item E.1.e., regarding the policy on rental vehicle.

Use of State Vehicles -- The use of state vehicles may be authorized when shown to be economical to CRCPD. When a state vehicle is used for CRCPD travel, CRCPD may, upon written request by the state, provide reimbursement to the state for mileage at the current GSA mileage rate. When a traveler has received authorization to use a state vehicle, CRCPD may reimburse the traveler for fuel provided appropriate documentation is included with expense voucher.

Local travel - Generally, commercial carriers should be used for local transportation. Taxi and airport limousine fares, plus reasonable tip (i.e.15% of fare), are allowed to and from airport. Preference should be given to the most economical method.

POV may be used in lieu of commercial transportation. Reimbursement will be at the current GSA mileage rate. The extent of reimbursement, including mileage allowance and parking fees, cannot exceed the estimated cost of the most economical commercial method available.

6. Authorization

After planning a CRCPD meeting, the person desiring the meeting shall notify the OED travel coordinator and request travel authorizations for the appropriate persons expected to attend under CRCPD funding. When possible, due to the length of time needed for government officials to obtain out-of-state approval, the request should be at least two months before the planned meeting, and earlier when feasible. The person requesting the authorization is required to complete the "request for meeting" form for specific details of what information is to be included).

Working Group meeting requests -- CRCPD working group chairs are responsible for submitting the request to their respective council chairs with a copy to Sue Smith, OED travel coordinator (email: ssmith@crupd.org). The council chairs are responsible for approving or disapproving the request and providing such response to both the working group chair and the OED travel coordinator. The OED travel coordinator will obtain verification from the OED Administrative Officer relative to the availability of funds to

support the request and proceed with issuing the travel authorizations.

- ***Working Group meetings held in conjunction with annual meeting--***
Working group meetings are generally held prior to or following the annual meeting. Members and others authorized to attend the working group meetings are paid to attend the meeting only and not to attend the annual meeting or training that is given in conjunction with the annual meeting. The Council Chair may authorize a working group chair's attendance to training that is given at the annual meeting when the information that is presented is clearly shown to be advantageous to the working group. It is up to the working group chair to communicate the information obtained back to his/her working group. For clarification, the other working group members must find alternate funding if they wish to attend. Exceptions may be approved by the council chairpersons, the CRCPD chairperson, and/or the Executive Director. *Following are examples of exceptions that have been approved: 1) Working group chairs and/or members who have direct responsibility for putting on approved training in conjunction with the annual meeting; 2) Working group chairs who have been approved to be on the annual meeting program, either as a speaker or a poster presenter.*

Other meeting requests as addressed by Board policy --

- A CRCPD member desiring financial support to attend a professional meeting must receive the prior approval of the CRCPD chairperson. A CRCPD member desiring such support must submit to the OED, in writing, sufficiently in advance of the proposed meeting, a request identifying how attendance to such a professional meeting will benefit the CRCPD.
- ***International Travel*** - Any international travel by members of the CRCPD shall be approved by the full Board.
- ***Annual Meeting*** - All travelers authorized to attend the Annual Meeting shall contact the OED at least 60 days prior to the travel date and make necessary flight arrangements in order to take advantage of the lowest possible fares available. An exception may be made in the case where a traveler is authorized to travel after the lowest possible rates are no longer available. This particular traveler is expected to make arrangements immediately upon receiving authorization in order to obtain the lowest airfare available. ***Clarification: Working group chairs must obtain approval of their respective Council Chairs for meetings in association with the annual meeting in time to meet this 60 day requirement. Intent: It is the general intent that for the CRCPD to support the financial costs for members attending the entire annual meeting, that such members take advantage of the lowest possible airfare. To implement the above interpretation, the traveler should be offered the following option in the event that they cannot or do not want to take advantage of the lowest possible airfare.***
 - a. For support for the entire meeting, the CRCPD will pay the lowest possible airfare available with the traveler picking up the difference. As related to flight arrangements, the Board of Directors encourages the Office of Executive Director (OED) and the traveler when authorized to make every

- effort to obtain the lowest airfare available including discounted fares and non-refundable fares including penalties. If the traveler locates a lower fare than quoted by CRCPD, the traveler with OED's permission may purchase the cheaper fare and submit for reimbursement with proper documentation along with their travel expenses.
- b. For an invited speaker, the traveler has the option of "a" above or the CRCPD will support the higher air fare for their speaking engagement only and not support the traveler for the entire meeting.

Reporting to Board and Members

Report to the Board -- CRCPD members who are authorized to participate in a meeting on behalf of CRCPD are required to provide a short report to the Board within two weeks following the meeting. The Board believes it is important that they, as CRCPD's elected officers, be kept informed as to the outcome of meetings to which CRCPD is represented. This applies whether CRCPD or other funds are used to support attendance. The member may provide the information utilizing one of the following methods:

- a. Email the OED with a request that it be forwarded to the Board.

If a travel authorization is needed, OED will provide a report reminder including instructions. For clarification, if a working group is authorized to meet, the chairperson will have the report reminder noted on his/her travel authorization only, and not on all members' authorizations.

Newsbrief Article for Members -- Members representing CRCPD are strongly encouraged to write an article that can be shared with the rest of the members via the *Newsbrief*, which is published every other month. The article should be forwarded to the OED *Newsbrief* Editor. When information is time sensitive, members are encouraged to send the information to the OED with a request that it be forwarded to the membership via email.

Submission/Payment of Travel Expense Vouchers

A travel expense voucher, with the required receipts, and a copy of travel authorization attached, shall be prepared and submitted for payment to the OED within 30 days of the date when travel is completed. If the voucher is not received within the 30 days, the traveler will be notified of his/her delinquency. Following this notification, if the traveler does not submit the voucher within an additional 30 days, a written notice will be sent notifying the traveler of possible deobligation of funds for the trip. If some "unforeseen circumstances" should arise and such compliance is unreasonable, the OED may grant an extension, if justified in writing.

OED Fiscal Department Policy Regarding Payment of Travel Vouchers

- ***General Policy*** - Two weeks will be allowed for OED to process and mail reimbursement checks following the receipt of a correct expense voucher. Due to the volume of annual meeting travel, three weeks will be allowed. The Business and Financial Office is very sensitive to the needs of our travelers and agrees to process vouchers as quickly as possible. It

should be understood that vouchers pending additional information will take more time to process. As noted in the *CRCPD Travel Regulations*, travel advances up to 75% of the total estimated cost of the travel, excluding airline cost, may be obtained up to two weeks prior to the meeting. Please refer to the *Travel Regulations* for additional information. Forms may be obtained by contacting the OED Business and Financial Office.

Personal Travel in Conjunction with CRCPD Travel

For any traveler who chooses to combine personal travel with official CRCPD travel, the maximum amount to be paid to the traveler by CRCPD will be the amount which the trip would have cost without personal travel involved. The determination of this maximum amount will be based on the lowest air fare, considering non-refundable tickets and tickets with penalties, which would have been issued under normal circumstances. It shall be the responsibility of the traveler who desires to combine business and personal travel to sign a written statement of the maximum amount which he or she can expect at the conclusion of his or her travel. This policy applies even if the traveler initially planned combined travel, but later decides to travel on official business only, and the change of decision results in a higher airfare cost. For clarification, should the CRCPD cause a change that results in a higher fee than was originally agreed upon, the CRCPD would be liable for the additional cost.

Frequent Flyer Policy

CRCPD members are to follow their individual state's policy regarding the frequent flyer system. OED is not to be involved in frequent flyer issues. It is the responsibility of the individual to deal with the airlines on these matters.