

# BROOKINGS

---

## **TRAVEL GUIDE FOR NON-EMPLOYEES TRAVELING ON BEHALF OF BROOKINGS**

### **INTRODUCTION**

This Travel and Entertainment Policy provides guidelines and establishes procedures for those incurring business travel and entertainment expenses on behalf of The Brookings Institution.

Its objectives are to:

- Ensure that all travelers have a clear understanding of policies and procedures for business travel and entertainment.
- Provide travelers with a reasonable level of service and comfort at the lowest possible cost.
- Maximize Brookings ability to negotiate discounted rates and reduce travel expenses.

Travelers are responsible for complying with the travel policy. Brookings will reimburse all reasonable and necessary expenses incurred while traveling on authorized company business and in compliance with the policy.

### **TRAVEL ARRANGEMENTS**

All air travel, lodging, car rental and rail travel reservations should be made through the Institution's authorized agencies.

Travelers should request airline reservations according to necessary departure or arrival times rather than specific airline, flight number, or personal travel incentives offered. In addition, care should also be taken to make travel arrangements as far in advance as possible, thereby allowing travelers to take advantage of the most inexpensive flights.

Traveling employees may retain frequent flyer program benefits. Participation in these programs must not influence flight selections that would result in additional cost to Brookings beyond the lowest available airfare.

## **DOMESTIC AIR TRAVEL**

Travelers should make air travel reservations through the authorized travel agencies. **All domestic air travel must be in coach class.** Travelers are expected to use lowest logical airfares whenever possible. These include:

- non-refundable fares
- Saturday night stayovers
- advance purchase fares
- connecting flights
- flights from alternate airports

Brookings will reimburse for a Saturday night hotel stay provided the total cost of airfare and hotel is less than the cost of an unrestricted fare.

Should an airline delay necessitate an overnight stay, the traveler should attempt to secure complimentary lodging from the airline.

If a ticket is lost or stolen, either of the Brookings travel agencies will assist in processing lost ticket applications. There is a charge by the airlines of up to \$50 to obtain a lost ticket application form.

If a ticket—or any portion of a ticket—is not used, it should be returned immediately to the travel agency for a refund. Tickets are negotiable. They should not be thrown away.

## **INTERNATIONAL TRAVEL**

Travelers are expected to use the **lowest logical** airfare available. International travel must be in coach class except when total flying time exceeds 8 hours. In this case, contact the Brookings staff member handling your event for further information.

**Foreign currency** may be purchased at banks, airport foreign exchange counters and major hotels abroad. Travelers may want to consider purchasing travelers checks in foreign currency before leaving home. Travelers abroad should change unused local currency back to U.S. dollars before departing the foreign country to get a better exchange rate.

Emergency medical assistance insurance may be purchased for travelers going to countries where medical care is difficult to obtain or inferior in quality. Either of the authorized travel agencies can arrange for this type of insurance.

## **ELECTRONIC TICKETING**

With the exception of select international itineraries that require paper tickets, the airline industry is moving to a 100% electronic ticketing environment (several airlines have implemented \$50 fees for paper tickets).

**Electronic ticketing must be used whenever possible and all travel should be booked using Brookings authorized travel agencies.**

If, however, a traveler books travel in a way that requires reimbursement, the following items must be submitted along with the [Travel Expense Reimbursement Form](#):

- One of the following proof of payment forms: a print-out of the on-line purchase, or a "paid" invoice; *and*
- Original ticket receipts or original boarding pass; *and*
- A print-out or copy of the itinerary.

## **TRAVEL TO “WAR RISK” COUNTRIES**

### **Insurance Requirements for Travel to “War Risk” Countries**

People traveling on Brookings official business (employees, trustees, consultants, guest speakers, etc.) are covered under Brookings Group Travel Accident insurance unless they are traveling to any of the countries listed below. It is possible to apply for special and specific coverage in advance of travel to the countries listed below:

- Iraq

To apply for this coverage, travelers should send an e-mail to their staff contact at least seven days before the travel is booked with the following information:

- What cities or areas will be visited?
- What are the dates of travel?
- Where will the traveler be staying in each area?
- What transportation arrangements have been/will be made for the traveler to get around the country?
- What security arrangements have been/will be made to keep the traveler safe while in this/these countries?
- What is the purpose of the trip?
- What will the traveler be doing while there?

The staff contact should forward this information, including the project number to be charged for the cost of the insurance – if the insurer can provide coverage - to their program administrator and the Brookings Business Services Office.

## **TRAVEL ACCIDENT INSURANCE**

### **SunTrust Visa Travel Accident Insurance:**

Travel accident insurance of up to \$500,000 is provided through SunTrust Visa **when you purchase your tickets through one of the authorized Brookings travel agents** and charge the ticket to a Brookings project. If you do not use the authorized Brookings agents and charge a project, you are automatically waiving the right to this additional coverage.

In addition, SunTrust Visa offers these services to Brookings travelers when they book with an authorized agency and charge to a Brookings project:

- Emergency Message Service
- Medical Referral Assistance
- Legal Referral Assistance
- Emergency Transportation Assistance
- Emergency Ticket Replacement
- Lost Luggage Locator Service
- Emergency Translation Service
- Prescription Assistance and Valuable Document Delivery Arrangements
- See Your Guide to Benefits Package — Visa Commercial Card" for more detailed information about these services

**Visa Travel and Emergency Assistance Services:** 1-800-VISA-911 (in U.S.) or 0-410-581-9994 (outside of U.S.) Travelers may call this number collect.

## **LOST BAGGAGE**

The ultimate responsibility for retrieving and compensating for lost baggage lies with the airlines. Brookings will not reimburse travelers for personal items lost while traveling on business. Travelers should follow these procedures if bags are lost en route:

- Obtain a lost luggage report form from an airline representative in the baggage claim area.
- Itemize the contents of the lost luggage.
- Include a copy of the airline ticket and baggage claim stubs with the lost luggage report and the itemized list of the bag's contents.
- Submit all documentation to the airline.

## **LODGING**

Brookings has rate and billing arrangements with certain hotels in Washington and elsewhere. The staff member handling your event can make hotel reservations for you or suggest a hotel.

Costs for hotels located in the District of Columbia should be direct billed to Brookings for tax savings. A personal credit card should not be used for payment.

Travelers should also do the following:

- Use available hotel transportation to and from airports in lieu of cabs, rental cars, car services or limousines..
- Take advantage of hotel amenities, such as breakfast, which are often included in the room rate.
- Inquire, when checking in, if a lower rate is available. Hotels often offer specials depending on number of rooms not yet booked for that night.

## **PERSONAL CARS**

Travelers should use their personal car for business if less expensive than economy air travel, renting a car or taking a cab. Brookings currently reimburses at the rate of \$.48.5 per mile. To be reimbursed, travelers must state on their expense report the purpose, date and location of the trip, and provide receipts for tolls and parking as well as a print-out (e.g., Mapquest) to confirm the mileage claim.

## **RENTAL CARS**

Rental or personal cars should be used when driving is more cost effective than airline or rail travel. Travelers should rent a car at their destination only when it is less expensive than other transportation modes such as taxis, limousines or airport shuttles.

Because the traveler's personal auto insurance carrier is the primary insurer, **all insurance coverage except Collision Damage Waiver/Loss Damage Waiver should be declined.**

A rental car should be **refueled** before returning it to the vendor. Some rental car companies have initiated fuel purchase options that allow the driver to purchase a full tank of gas up front. The driver does not have to return the car with a full tank of gas and simply uses as much fuel as is necessary. This is cost effective only if the traveler anticipates using a full tank of gas for the trip.

## MEALS

Travelers will be reimbursed for **reasonable** personal meal expenses when **itemized** receipts are submitted. Charges for alcoholic beverages will not be reimbursed.

## EXPENSE REPORTING

**On-line form:** [Travel Expense Report](#)

Reimbursement for travel expenses will be made on presentation of a properly prepared Brookings Travel Expense Report with all original receipts attached, signed by the traveler (or with a signed letter requesting reimbursement), and approved by the program administrator's office. The form should be given to the staff member associated with your event. He/she will prepare it for processing. All information requested must be provided.

***Original air and rail travel receipts must be submitted with all reimbursement requests, including tickets purchased (and direct-billed) through the travel agencies.***

In addition, the following documents must be submitted:

- hotel bills plus credit card receipts
- rental car agreement plus proof of payment
- credit card receipts or cash register receipts for meals
- taxi cab receipts

*Original* itemized receipts, not photocopies, must be submitted. Except for unusual circumstances, which must be explained on the Travel Expense Report, Brookings will not reimburse expenses without itemized receipts. Expenses should be adjusted equitably if personal or other non-Brookings business was conducted during the period of travel.

The Travel Expense Report should be submitted by the traveler to the staff member associated with your event as soon as possible after completion of travel, but not later than the end of the month in which travel occurred.

When filing expense reports for travel outside the U.S., complete the reports in U.S. dollars and clearly indicate the U.S. dollar amount on all accompanying foreign currency receipts. The Brookings Office of Accounting and Finance recommends [oanda.com](http://oanda.com) for your foreign currency conversions. The direct link to the conversion information is [www.oanda.com/convert/classic](http://www.oanda.com/convert/classic).

Please make the required conversions based on the date the expenditure was made (not

the date the form is being prepared) and attach the printed oanda page for each expenditure to the Brookings Travel Expense Reimbursement form.

## **REIMBURSABLE EXPENSES**

Travelers will be reimbursed for the following miscellaneous expenses in accordance with the preceding guidelines.

- Business office expenses such as internet, phone, fax & copy services
- food and beverages
- gasoline for rental car
- ground transportation
- parking
- personal car mileage
- taxis
- tips for meals and cab fares up to 18%
- tips for baggage handling up to \$1.00 per bag
- tolls

## **NON-REIMBURSABLE EXPENSES**

The following items will not be reimbursed:

- airline club memberships
- alcoholic beverages
- ATM fees (domestic)
- fitness center use
- laundry and dry cleaning
- lost baggage
- massages
- mini-bar/ honor bar refreshments
- movies
- parking/traffic violations
- rental car upgrades
- rental car insurance except Collision Damage Waiver/Loss Damage Waiver
- items in excess of reasonable expenses

## **AUTHORIZED TRAVEL AGENCIES**

### **Approved Travel Agencies**

**Use these agencies to plan travel and request reimbursement.**

#### **Garber/FCm Travel Solutions**

2020 14th Street N.

Arlington, VA 22201

703.807.0300 and 1.800.816.8747

703.807.0307 FAX

Office Hours: 8:30 a.m.–8:00 p.m. (Eastern)

24 Hour Emergency Phone: 1.800.508.7445 Code: E0T3

#### *Brookings Agents:*

Mohammed Ali

[mali@garber.fcm.travel](mailto:mali@garber.fcm.travel)

Judy Bailey

[jbailey@garber.fcm.travel](mailto:jbailey@garber.fcm.travel)

Gem Brown

[gbrown@garber.fcm.travel](mailto:gbrown@garber.fcm.travel)

Guled Hagi-Mohamud

[gmohamud@garber.fcm.travel](mailto:gmohamud@garber.fcm.travel)

Adane Meles

[adane.meles@garber.fcm.travel](mailto:adane.meles@garber.fcm.travel)

Elizabeth Pineda

[epineda@garber.fcm.travel](mailto:epineda@garber.fcm.travel)

Linda Weckel

[linda.weckel@garber.fcm.travel](mailto:linda.weckel@garber.fcm.travel)

#### **Carlson Wagonlit Travel (formerly Navigant)**

4601 North Fairfax Road, Suite 150

Arlington, VA 22203

703.276.2009 and 1.800.535.9117

703.276.2077 FAX

Office Hours: 9:00 a.m.–5:30 p.m. (Eastern)

24 Hour Emergency Phone: 1.800.469.3939 Code: 55RA

#### *Brookings Travel Team:*

703.253.2731 or 1.800.535.9117

703.525.5705

[brookingstravel@carlsonwagonlit.com](mailto:brookingstravel@carlsonwagonlit.com)

Maybelis Fernandez ext. 3083

Laura Shores ext. 3022

Sissel Smith ext. 3081

## **FORMS**

- [Brookings Travel Expense Reimbursement Form](#)

## **CONTACTS**

Please contact the Brookings employee responsible for your event if you have questions.