

Destinations Unknown: How to Create Travel and Transport Policies That Balance Safety and Flexibility



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If you haven't updated your travel and transportation policies lately, they may be out of sync with your current reality. This article explores a pragmatic approach to creating new or updated travel and transport policies that will help you get out in the community where your mission comes to life.

Make Traveler and Community Safety Top of Mind

Three years of managing through a global pandemic reminded nonprofit leaders that personal safety is key to mission success. In the pre-pandemic era, many nonprofit travel policies focused on the twin pillars of cost and compliance. Such policies reminded employees to always choose the most economical mode of travel, while imposing strict requirements for use of organization credit cards and completion of expense reimbursement forms.

While cost and compliance remain valid considerations, in today's new reality, safe travel practices should headline travel communications. Staff whose travel choices put cost ahead of safety cannot be effective mission ambassadors. Remember that negative experiences leave a deeper imprint than positive ones. You're more likely to remember the one time an airline lost your suitcase than the dozens of times your bag arrived safely. One business traveler we spoke with for this story explains: "We were required to stay in a dumpy hotel to save a few bucks; next time I'm asked to travel, I'm going to find an excuse not to. It was impossible to sleep with the noise happening in the rooms on either side of mine."

Heather Chadwick, Director of Risk & Policy at Teach For America (TFA), told me that TFA now prohibits staff from using "any home-sharing services (Airbnb, VRBO, HomeAway, etc.) for lodging, since laws for such services vary for each state and these services may create greater safety, security and harassment risks compared to hotels offered through our centralized travel booking site. We are aware that home-sharing can sometimes be more economical, but we do not allow exceptions because of our concern for the safety of the TFA team." TFA also keeps safety top-of-mind for vehicle rentals. Heather reports that TFA staff may "not use any peer-to-peer car rental services (Getaround, Turo, Maven, etc.) for transportation since laws for these services vary for each state and these services may create greater safety or security risks."

Tip: When you read your travel and travel reimbursement policies, does your commitment to safe travel leap off the page? Or is it buried in dense narrative about submitting timely expense reports and getting advance approval before booking trips?

Provide Important Information in an Accessible Format

A common experience for frequent travelers is landing in a distant city and struggling to remember the name and address of your destination. I've taken a few trips where I wound up sitting in the baggage claim area to recharge my phone so I could look up the name and address of my hotel. To avoid that scenario, I write down that important info on a small piece of paper and keep it tucked in a pocket. Working outlets on a plane are nice, but not always available!

A colleague I consulted about this topic told me that at his company they have taken that small piece of paper one step further: they provide a handy, business-sized card to all travelers. The card lists the services and points of contact the traveler might need in an emergency. The company also requires that travelers post their full itineraries on calendars available to the team.

Tip: Before printing up handy cards for travelers, ask your team what numbers, services, providers, web addresses and other information they would find most valuable on a small, printed card. Set a reminder to review the printed cards at least twice annually to make sure they remain up-to-date. With a plethora of providers offering low-cost printing for business cards, the small expense to create a travel safety card will pay off the first time a traveler relies on the information. And the peace of mind a printed card offers is priceless.

Revisit Dollar Limits and Per Diems

While a growing number of nonprofits simply ask travelers to use discretion and judgment in booking reasonably priced accommodations, others continue to use per diem rates. If you've been part of the wave of people traveling for pleasure and business after three years of staying close to home, you've probably noticed that travel costs are much higher this year. According to NerdWallet, "...the overall cost of travel is up 16% compared with May 2019..." although airfare ticked downward in 2023 after hitting record levels in mid-2022.

One of my colleagues in the insurance industry told me his company has increased per diem amounts for all travel categories across the board, and has set separate per diem rates for each meal of the day and by type of location. The company's policies don't have city-specific rates, but rates are higher for major metropolitan areas. The Federal government's FY 2023 per diem rate for lodging is incredibly low at \$98, but 316 non-standard areas in the US have higher per diem rates. And the Federal Travel Regulation allows for actual reimbursement when the per diem rate is insufficient.

Another colleague, who leads operations for an international nonprofit, told me her organization has changed its travel policies to permit staff to book refundable fares and provide a per diem of 100% of meals and incidentals expense, instead of the prior practice of providing 50 or 75%. She added that the nonprofit is now more generous in covering airplane seat upgrades, day rooms for long layovers, and contributing to lounge memberships.

Tip: If you have chosen the dollar limit or per diem route, consider whether you're requiring travelers to spend endless hours (time = money) finding safe, suitable accommodations instead of focusing their attention on your mission and their critical work tasks.

Ask, Don't Assume, That Staff Are Available to Travel

One senior nonprofit leader I interviewed for this article told me that "A trend we're seeing is an overall decrease in some employees' desire to travel for work, or for as long or often." If you're a member of the Gen X or Baby Boomer generation, you may recall a time when you were told, not asked, about an upcoming business trip. And that was long before business travel expectations were added to position descriptions!

Keep in mind that a staff member's availability and interest in travel will likely change during the course of their employment at your nonprofit. Following an intense period of caring for an elderly parent or after the kids have finally left the nest, a team member may be eager to resume travel. Check in with team members regularly to

inquire about availability to travel; don't assume the employee's preference last year remains true today.

Tip: If a high-performing employee tells you they are unable to travel outside the area, refrain from questions that simply satisfy your curiosity about why. Accept the employee at their word, encourage them to reach out if that preference changes, and ask if it would be ok to revisit the topic in a year's time.

You Can't Go Back: Recognize the Staying Power of Remote Work

Heather Chadwick shared that Teach For America's business travel practices have changed significantly in recent years, but while business travel has increased some, she doesn't expect it will ever return to pre-pandemic levels. She adds, "We continue to balance budget constraints with org-wide needs and we recognize the impact that in-person work can have so we are trying to be intentional about when in-person work happens."

Tip: Convene your team to talk about remote versus in-person meetings. What circumstances truly warrant the inconvenience and cost associated with business travel? At NRMC we believe site visits for [Risk Assessments](#) are very helpful when the mission of the nonprofit includes delivering diverse programs from multiple facilities. If a client's team mostly works remotely, we conduct the entire Risk Assessment without ever getting on an airplane or on the road.

Be Proactive: Just Because It Hasn't Happened Doesn't Mean It Can't or Won't

A senior risk leader from an international nonprofit told me that "From supervision, and housing policies and protocols, to insurance coverage (travel-related, medical, repatriation, etc.), travel crisis communications plans, medical/health considerations/assessment, to general travel safety provisions, we take proactive steps to help ensure the health and safety of everyone who travels under our auspices."

Being proactive and prepared are key to building organizational resilience. No nonprofit mission can afford to be stalled or waylaid because of an incident leaders believed could never happen. Advance preparation to equip travelers with tools and a safety mindset will reduce the likelihood of mishaps, and ensure that travelers know what to do and who to call if something does happen.

If you're relying on providers that offer emergency assistance, seek assurances that those services will be available when you and your travelers need them. One senior nonprofit leader told me her organization has grown concerned about the performance of emergency evacuation providers who may be overtaxed and unable to live up to their promise of immediate and potentially life-saving services.

Tip: Risk readiness requires thinking of disruptive events and circumstances that have never happened. Invite your team to brainstorm potentially disruptive events that could impact staff travel. Ask: what can we do now to ensure resilience should that 'what if' event occur?

It's a New Day: Refresh Your Travel and Transportation Policies

Each of the people I reached out to for this article offered insights into some of the most relevant trends and developments that will guide future decisions about staff travel as well as valuable recommendations to colleagues updating travel policies. These insights and recommendations included:

- "Approach your policies in a way that addresses business needs and realities, yet leaves room to reasonably accommodate, when possible, the increased overall travel health and safety concerns and needs some individuals may have coming out of the pandemic."
- "Communicate, don't assume! If you don't have a travel policy, develop one."
- "The most important thing we did was to emphasize that staff are not required to travel if they are uncomfortable traveling—no questions asked. While we emphasized it initially due to different tolerances/circumstances with the pandemic, we are also referring to it in other contexts, such as in connection with travel to countries with anti-LGBTQ laws."
- "Make sure you're looking at your policies through an equity lens. For example, our organization has added additional benefits for parents with small children."

With respect to policies concerning the transport of clients and participants, remember to:

- Ensure all drivers have been screened and deemed eligible to drive on your behalf.
- Institute checks to verify that vehicles your nonprofit owns are properly maintained and checked to ensure safety features are working as intended; these checks should be more frequent than the safety inspections required by your state.
- Properly train drivers and require them to sign a pledge agreeing to safe driving practices.
- Carefully review telematic devices and other tech tools available from your automobile insurer, and use those that have more advantages than disadvantages for your nonprofit.
- Regularly review accident and incident reports to identify root causes and follow-up items.

In the Disney/Pixar film “Up,” the globetrotting, profound Charles F. Muntz says, “Adventure is out there.” When I’m asked how I cope with the drudgery of business travel, I sometimes reply: “I love traveling because that’s where the people are!” Personally, every flight delay or cancellation, every disappointing hotel stay, and every moment of utter exhaustion has been well worth it. Without traveling to the places where nonprofits serve people and communities, my appreciation for the incredible work and impact of our sector would be a teeny fraction of the vast whole.

An up-to-date travel policy grounded in simple safety messages should be a resource, not a burden, to staff who travel to support your mission. And a practical, clearly-written transportation policy should inspire pride among those who drive on your behalf. You owe it to your mission and your traveling ambassadors and passengers to right-size and streamline these policies without delay. The world around you is waiting: are you ready?

Melanie Lockwood Herman is Executive Director of the Nonprofit Risk Management Center. She has always loved to travel, and is grateful anytime an airline delays takeoff to address maintenance and mechanical issues. Whenever possible, she sits in the window seat of the exit row. She welcomes your questions about any topic in this article or your tips for finding low-cost, last minute trips anywhere, at Melanie@nonprofitrisk.org or 703-777-3504.

SAMPLE: Overview of a Travel and Safety Policy

The contents of a travel and safety policy for your nonprofit should look very different from the policy of an organization with a different mission, structure, and resources. With that in mind, below are some of the sections you may want to include in your travel policy.

Tip: Choose bullet points over dense narrative for the most important messages in your travel and safety policy! Use bold and italics sparingly to draw attention to key pieces of information. NEVER USE ALL CAPS OR RED WORDS! YOUR POLICY IS TO BE READ TO HEAR.

Overview

The overview section of your policy may include a reminder that “all travel expenses must be reasonable and necessary,” remind travelers about the need to seek approval before leaving travel, and let them know who to address questions to. An appropriate overview may highlight a few high-level messages, such as:

- Exercise discretion and good judgment.
- Be cost-conscious, while balancing cost effectiveness with environmental awareness. Expenses/policies as much as 20% the emissions of direct flights.
- Make reservations as far in advance as possible to take advantage of reduced fares.
- Submit required supporting documentation within 30 days of completing your trip.
- Report expenses accurately.
- You may not book more expensive travel to better suit personal travel plans.
- You may occasionally face rules and points for approved travel, however, you may not choose a more expensive itinerary for the sole purpose of earning miles or points.

Travel Safe!

The travel safety section of your policy should contain statements relevant to your mission and the types of business travel you expect. Ask experienced staff members for their safety tips and include them here.

- Always fly in pairs, except where compliance would involve a breach of human rights or dignity. Consider time, risk, procedures, and your internal policies and procedures.
- Unless there is a dire emergency, never use a phone while driving; the prohibition includes hands-free conversations.
- Report back to your supervisor about ANY security concerns or incidents that happened while you were traveling. A near miss is an incident, and anything that ISMS requires IT to investigate.
- Learn as much as you can about security in the areas that you are traveling to. ISMS can help.
- Keep the travel safety card provided by us in your wallet while you are traveling. Keep a photo of the card in your phone in case you lose your wallet.
- Designate a staff member (your supervisor or a colleague who you know will be available) to check in with each day you are on travel.
- Avoid putting yourself in any situations that may increase security risks to you and/or any national partners traveling with you.
- Use common sense and sound judgment. If you sense things, follow your instincts. If you feel something isn't right, wherever you are, leave. Don't worry about consequences or seeming foolish. The common judgment you use at home applies wherever you travel.
- Communicate your concerns, suspicions, and observations to your supervisor and trusted colleagues.
- Be well! Eat well, travel less, and get adequate rest and relaxation. Stress is one of your worst enemies. Becoming sick or exhausted will not help you accomplish your work. Always

travel with a container for water and remember to keep hydrated!

- Upon checking into your hotel room, look at the diagram on the back of the door and note the location of the emergency exit (downward), and also the distance from your room. If possible, request a room on a lower floor in case you need to exit in an emergency (2nd - 4th floor).
- Never travel in a vehicle whose driver appears to be impaired.
- If you are uncomfortable with the speed of the vehicle in which you are a passenger, politely ask the driver to please slow down.
- There is no such thing as a personal risk. Every risk you take represents a potential risk to the team, our mission, and the people and communities we serve.

Use of Organization Credit Cards + Employee Reimbursements

- Submit expense reports at the end of every month in which expenses were incurred.
- Never use your organization credit card for personal expenses.

Mileage Reimbursement and Rental Cars

- Business travel in a personal vehicle is reimbursable at the current IRS rate for mileage.
- Travel to and from your primary place of work is not reimbursable.
- Renting a car for business purposes is permitted while traveling in the United States, when traveling internationally, for a business trip or service for local transport.