Travel Risk: How Your Nonprofit Can Safely Negotiate the Return to Travel

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Webinar Agenda

The Road Map: Travel Policies and Procedures

How to Weigh the Risks and Benefits of a Trip

What to Do and Not Do Before, During and After a Trip

Closing Thoughts
Travel Policies and Procedures

- Consider your organization's unique travel needs when creating or updating a policy.
  - A travel policy for a small nonprofit might be one page, while the policy for a large international nonprofit could be multiple pages long.
Travel Policies and Procedures

- Some things to consider when crafting policies:
  - What travel expenses your organization will and will not cover
    - Lead with respect and flexibility. For example, “Employees are expected to use good judgment regarding expenses covered by this Policy, including the selection of carriers, hotels and ground transportation options.”
  - Whether your nonprofit permits or requires that staff book refundable tickets
    - Tip: although refundable airfares generally cost more than nonrefundable fares, it would be a shame to waste money on a ticket that can’t be used due to circumstances beyond your team member’s control.

- Some things to consider when crafting policies:
  - Approved travel partners and providers, vetted for safety
  - Approval steps or procedures before booking travel
  - Communication expectations while on travel
  - General tips on staying safe while traveling
  - Vaccination, visa, and other requirements
Travel Policies and Procedures

• Some things to consider while crafting policies:
  • COVID-related considerations, such as:
    • precautionary health screenings for employees and their families
    • health and safety practices (for social distancing, masking, etc.) that follow the recommendations of official organizations such as the U.S. Centers for Disease Control and the World Health Organization

Policy Questions As Your Nonprofit Returns to Travel

- Can you require proof of vaccination before requiring employees to travel?
  - Yes; refrain from asking questions that require disclosure of personal medical information
- If an employee doesn’t want to travel for business due to COVID risk, can you require it?
  - Legally, you probably could, but we don’t recommend it.
What About Travel Insurance?

- Speak with the agent or broker for your nonprofit’s property and casualty coverages to determine which, if any, policies are applicable to business travel.
- Determine if your volume of upcoming travel warrants purchasing additional coverage.
- Decide whether to encourage OR discourage travelers from purchasing coverage from rental car providers.
  - confirm applicability of non-owned auto coverage with your broker
  - research coverage/exclusions on your business credit cards

How to Weigh the Risks and Benefits of a Trip
How to Weigh the Risks and Benefits of a Trip

- This calculation looks the same as it did pre-COVID...and very different!
- Questions to ask yourself:
  - Why is your organization considering this trip?
  - What do you hope to achieve at your destination?
  - Are there other ways to connect with the people you hope to connect with?
  - How extensive are Covid cases? What’s the health system capacity if you get sick or injured?
  - What can you only accomplish, or most effectively accomplish, in person?
  - What possibilities exist beyond “go” and “don’t go?” Modifications, compromises?

Drive or fly?

- In most cases, if your destination is more than 300 miles away, it will be faster to fly ... BUT!
  - Consider all the costs of your trip: gas, tolls, parking, time in traffic or security checkpoints
  - Consider environmental impact
    - Pay attention to details: A solo driver might produce more carbon emissions than buying a single seat on a flight!
    - Consider your organizational and personal priorities
Driving safety tips

- Make sure employees who will hit the road for your organization brush up on driving safety basics.
  - You may want to create a policy that outlines your organization's commitment to driving safety and specific requirements for employees who drive for work trips.
  - Consider creating a code of conduct with simple statements that employees can sign and agree to comply with.

Driving safety tips

- Consider addressing these topics in your policy:
  - Require seat belt use
  - Prohibit use of drugs or alcohol prior to driving on the organization's behalf
  - No smartphone use while driving
  - Report crashes and accidents as soon as possible
  - Disciplinary program and reward program details
What to Do and Not Do Before, During and After a Trip

Before You Book

- Review your organization’s travel policies.
- Check travel advisories for any health and safety issues at your destination.
  - U.S. Department of State website
- Obtain approval for the trip from your supervisor and any other necessary parties.
- Confirm requirements to visit your destination and prepare to meet them.
  - Apply for necessary visas and schedule required vaccinations.
  - Allow plenty of extra time in case of processing delays.
Before Travel

- Book your itinerary according to your organization’s policy.
- Schedule a security briefing before travel to higher-risk locations.
- Update your immunization record if traveling internationally.
- Screen for health issues as appropriate.
- Have alternative payment methods ready.
- Designate a staff member to check in with while traveling.
  - Set a schedule for how frequently you will check in and by what method.
- Understand and prepare for your technology options and any limitations.

During Travel

- Check in with your designee every day.
- Use good judgment.
- When in doubt, leave the situation.
  - Trust your intuition!
- Recognize and follow local laws and regulations.
- Report any concerns, even if they seem small, to the appropriate contacts with your organization or host.
- Take care of your health.
  - Mask according to your comfort level, that of your hosts and the health risks the situation presents to you and others.
When You Return

- Notify your supervisor immediately when you return.  
  - Report any security issues that arose during the trip.
- Return any IT equipment you borrowed for use during the trip.
- Complete expense reports by the due date.
- Debrief with your supervisor and any other required colleagues.  
  - What was your experience with safety, security and health?  
    What can you and your organization learn for the future?
- Take time to process your experience.  
  - Celebrate a successful trip or acknowledge that you handled challenging situations.
  - What new experiences stood out? What will stay with you?

Closing Thoughts
Travel isn’t always pretty. It isn’t always comfortable. Sometimes it hurts, it even breaks your heart. But that’s okay. The journey changes you; it should change you. It leaves marks on your memory, on your consciousness, on your heart, and on your body. You take something with you. Hopefully, you leave something good behind.

—Anthony Bourdain

Resources

COVID-19 Travel Advice—Mayo Clinic

How the Pandemic Is Reshaping Corporate Travel—Deloitte

Travel Advisories—U.S. Department of State
https://travel.state.gov/content/travel/en/traveladvisories/traveladvisories.html
Thank you!

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