

10. TRAVEL

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This section outlines travel policies and procedures for international and in-country travel and related meals and incidental expenses payments.

HQ Travel Lead: Treasurer to the Board

10.1 ROLES AND RESPONSIBILITIES

University of Washington (UW):

- Set minimum travel policy standards.
- Make all US travel reservations.
- Inform travelers to the United States of travel documentation requirements.
- Assist in non-US travel, when requested.

UW-Kenya Country Office:

- Implement minimum travel policy standards.
- Make all domestic and non-US travel reservations.
- Inform non-US travelers of travel documentation requirements.
- Develop and implement domestic travel standards.
- Develop and implement a country office meal and incidental standards.

UW-KENYA and Project office staff:

- Adhere to travel policy.
- Submit travel requests and related documentation.

10.2 INTERNATIONAL TRAVEL

The Fly America Act requires that all air travel to and from the United States financed by US government funds be made on US flag carriers to the extent service by such carriers is available.

The PI's Department is responsible for booking and payment of international flights for UW-KENYA staff, eligible dependents (as part of relocation packages), and consultants relocating and traveling on official UW-KENYA business. UW-KENYA does not arrange travel for family members opting to travel with an employee.

10.2.A AIR TRAVEL STANDARDS

The following standards are **obligatory**, whether booking air travel via headquarters or using a local travel agency.

- COACH CLASS VERSUS BUSINESS CLASS

UW-KENYA books coach class reservations with the most cost-effective carrier and routing of the itinerary. Exceptions to coach class bookings can be made when international itineraries are in excess of 14-hours duration (not including layovers in the United States and connection time) AND merit consideration due to medical and/or critical timing issues. The 14-hour standard is not sufficient justification for an upgrade from coach to business class. Two approvals are required before the headquarters Travel Office can procure the business class ticket:

- Pre-approval- Project Budget Manager
- Final approval and authorization—Project Principal Investigator (UW based)

UW-KENYA staff should submit an email on *Authorization for Air Travel Upgrade* to the Project PI for final authorization. Requests for business class travel because of staff medical conditions must have documentation attached from the staff's medical provider indicating the need for business class travel. A time frame of the medical condition is required (with a maximum of one year), but explanation of the medical condition is unnecessary.

- ACCOMMODATING TRAVELER PREFERENCES

UW-KENYA employees and consultants are liable for costs associated with itinerary changes made at his/her discretion after UW-KENYA booking. The traveler is responsible for costs incurred by extended layovers and/or trip routing made at her/his convenience. The traveler is responsible for paying in advance for any portion of a fare related to personal travel.

- FREQUENT FLYER MILEAGE

Frequent flyer mileage accrued while traveling on official UW-KENYA business is a personal resource of the traveler. A traveler's personal frequent flyer status on a given airline does not justify selection of that carrier over another more cost-effective option.

- REFUNDABLE AND NON-REFUNDABLE TICKETS

UW-KENYA is subject to UW travel policies and thus obligated to purchase refundable "contract" air tickets. UW-KENYA can purchase nonrefundable tickets for air travel when the cost differential is significant AND the itinerary is firm.

- PAYMENT

All airfare booked via the preapproved travel agency (Christopherson Business Travel) is charged to the respective Project/ Office budget.

10.2.B AIR TRAVEL ARRANGEMENTS

- TRAVEL TO AND FROM A NON-UNITED STATES DESTINATION

Before beginning travel arrangements to a non-US destination, UW-Kenya staff should fill out *Travel Request Form* and submit it to their Supervisors and Kenyan based Project P.I for approval.

- TRAVEL TO AND FROM THE UNITED STATES

The PI's Department is responsible for coordinating air travel for all UW-KENYA staff and consultants departing from or traveling to the United States. The Travel Coordinator of the PI's department will work with staff to arrange travel and pay for the airfare via the departmental CTA Card.

To begin travel arrangements, *the Project Budget Manager* and P.I must be emailed with details of the planned travel for approval. The approval given on email should then be sent to

the Project Accounting Coordinator at UW-Kenya. The same is to be used as part of flight payment documentation and in advancing any travel related funds.

The traveler submits completed forms to the Project Budget Manager. The Budget Manager approves and makes necessary arrangements with the preferred travel agency.

10.2.C TRAVEL DOCUMENTATION

- PASSPORT

The traveler is responsible to secure and maintain a current passport. The cost of additional pages in a passport can be reimbursed if needed to complete travel for UW-KENYA. A traveler will not be reimbursed for any passport expenses made prior to a request for him/her to travel.

- VISA

For travel destinations outside of the United States, the UW-Kenya staff is responsible for checking visa requirements, securing business related visas, and forwarding relevant documentation to UW-Kenya accounting team for payment of business related visas. Travelers are encouraged to obtain visas prior to departure if there is any risk of not being able to obtain one upon arrival.

- EMERGENCY CONTACT INFORMATION

The UW requires emergency contact information for all UW-KENYA travelers going to and from the United States via the VDS. The country office should collect emergency contact information for all employees traveling on UW-KENYA business.

- CUSTOMS LETTERS

To help ensure that UW-owned equipment is not seized in customs, travelers are required to carry an original copy of a customs letter, documenting UW-KENYA ownership of equipment purchased by the UW. Equipment that requires a customs letter includes: laptops and LCDs; equipment that does not require a customs letter includes: cell phones, Trios, and Blackberries.

Travelers transporting large quantities of materials or supplies such as software, lab supplies and training manuals may carry a letter on UW-KENYA letterhead, stating how the materials will be used and the cash value.

10.2. D TRAVEL SUPPORT

Some of the following standards for provision of travel support may be superseded by country office per diem and lodging policies.

- TRAVEL MEDICINE

Travelers to destinations outside the United States should visit a travel medicine facility at least 6 weeks prior to departure to secure recommended immunizations, prophylaxis, and TB baseline.

- COUNTRY OFFICE MEAL AND INCIDENTAL EXPENSES RATES AND LODGING EXPENSES

The UW-Kenya has set-up Kshs.2,000 as the bare minimum daily meals and incidental expenses rates for domestic travel. **Any amount above this should be approved by the Project P.I.** Any amount above Kshs.2,000 per day is taxable under the Income Tax ACT. UW-Kenya rates must be within US government limits and comparable to US government partner rates. Meals and incidental expenses reimbursement mitigates actual costs of work

related travel and is not intended to augment travelers' income. Country office should inform the Project Budget Managers of any change in country office meals and incidental expenses rates to ensure that rates are correctly referenced in travel-related documentation managed out of the UW.

- INTERNATIONAL MEALS AND INCIDENTAL EXPENSES

UW-KENYA utilizes US Department of State meals and incidental expenses rates to compensate staff and consultants traveling on official UW-KENYA business. The meals and incidental expenses rate is intended to cover breakfast, lunch, and dinner and incidental expenses. Meals and incidental expenses rates are determined by location and can vary by city within a single country. The US government rates detail allowable meals and incidental expenses rates and lodging costs and are available online at www.state.gov/m/a/als/prdm/.

UW-KENYA travelers are reimbursed at a pre-agreed rates as approved by the Project PIs. Travelers are obliged to report any meals provided to them during the course of a work-related trip, the meals and incidental expenses reimbursement will be adjusted accordingly. Reimbursement for meals is calculated as a percentage of the daily rate, as follows: breakfast (25%/lunch (30%/dinner (45%).

- MEALS AND INCIDENTAL EXPENSES WHILE IN INTERNATIONAL TRAVEL STATUS

Per UW policy, meals and incidental expenses reimbursement is provided at the per diem rate of the destination the traveler will spend the subsequent night. For example, if an UW-KENYA employee is traveling to Seattle from Nairobi, the Seattle meals and incidental expenses rate applies. If the traveler has a layover en route, then the layover city meals and incidental expenses rate applies on the first leg of the itinerary.

UW bases reimbursement on the time zone/meal schedule at the city of departure, whether in or outbound, extending that time zone schedule through the entire itinerary. The following UW guidelines should be used to calculate per diem reimbursement

Travelers go into travel status when departing from their official station or residence:

- Before 8 am, travelers may be reimbursed for breakfast, lunch, and dinner.
- Between 8 am and 2 pm, travelers may be reimbursed for lunch and dinner.
- Between 2 pm and 6 pm, travelers may be reimbursed for dinner.

Travelers may go into travel status up to three hours before a domestic flight and up to four hours before an international flight. Travelers come off travel status when returned to their official station or official residence:

- Before 12 noon, travelers may be reimbursed for breakfast.
- Between 12 noon and 6 pm, travelers may be reimbursed for breakfast and lunch
- After 6 pm, travelers may be reimbursed for breakfast, lunch, and dinner.

- LODGING

UW-KENYA utilizes the US Department of State lodging costs for traveler accommodation on international trips. **All local trips rates are based on Project pre-agreed rates with their respective P.Is.** The local rates cannot however be more than the US government approved rates. The US government rates are available online at www.state.gov/m/a/als/prdm/. Exceptions can be made for security reasons or exceptional traveler needs. The UW-Kenya CEO or Project Principal Investigator must authorize all exceptions. Travelers are reimbursed for accommodation costs upon presentation of a paid itemized receipt. In the event that a travel advance was issued to the traveler an itemized receipt is still required in order to reconcile the advance at the end of the trip.

- **LUGGAGE EXPENSES¹**

In situations where airlines charge for all checked baggage, UW-KENYA will pay for one piece of personal luggage and all checked luggage containing work materials. Luggage costs can be paid for with personal credit card, or cash.

- **BUSINESS EXPENSES**

The UW policy governing foreign travel allows reimbursement for certain business-related miscellaneous expenses beyond meals and incidental expenses and lodging. Reimbursable business expenses include: buses, shuttles, taxis, work-related phone calls, Internet access for work-related purposes, and visa fees. Receipts are required for claimed miscellaneous expenses over US\$50. **Projects may choose to set a lower limit.** Non-reimbursable business expenses include:

- Meals for other people (business related or otherwise);
- Tips for meals, maids, porters, etc.;
- Video, VCR, TV, or radio rentals;
- Food in excess of the daily meal allowance;
- Alcohol;
- Costs associated with personal entertainment, including taxis, event tickets, etc.;
- Fees for travel expense-related use of ATMs and currency exchange;
- Medical and hospital services; and
- Phone charges for personal calls with the exception of a 10-minute call upon arrival at the final destination and one prior to departure at the end of the trip.

Travel Reimbursement Form, which is an Excel spreadsheet, can be used by international and local travelers to track business expenses on an ongoing basis. Travel Advances See *Fiscal Operations* manual for details regarding eligibility and administration of travel advances.

10.2.E TRAVEL WITH PRIVATE COMPANIONS²

Travel with private companions is allowed under the following guidelines and with prior approval from the Project P.I.

- UW-KENYA/UW accepts no responsibility for the safety or security of companions traveling with the UW-KENYA affiliate.
- No UW-KENYA resources (e.g. time, funds, staffing) can be used to make arrangements for companions or to pay for any portion of the companion's travel-related costs.
- The designated traveling companion(s) is/are responsible for their own travel documents (e.g. visas) and medical care (e.g. pre-trip immunizations).
- The traveling companion(s) must not interfere with the UW-KENYA affiliate's work activities of the work activities of others at the local site.
- Companions may not travel in any UW-KENYA vehicle. The only exception will be where for operational convenience and staff safety, accompanying companion(s) can ride in UW-KENYA vehicles to and from the airport upon arrival and departure from the country. This is the only exception to this policy and it must be approved by the project PI prior to travel.

On the occasion when a companion will be traveling with the employee, consultant, student, or other UW-KENYA affiliate, an email needs to be sent to the project PI (or designee) to obtain authorization prior to the engagement of short-term, UW-KENYA sponsored travel.

¹ Updated 7th July, 2017

² Updated 7th July, 2017

10.3 COUNTRY OFFICE DOMESTIC/REGIONAL TRAVEL

Country office may book travel through local travel agencies for travel that does not include US destinations. These costs need to be charged to the right Project Office budgets per guidance from the PI and the Budget Manager(s).

Standards for train travel (if appropriate) should be developed by the country office and be comparable to air travel.