



CUPA-HR Chapter Board Travel Considerations and Guidelines

CUPA-HR chapter boards may allocate funds for board members to travel to the CUPA-HR Annual Conference, CUPA-HR Spring Conference or another CUPA-HR Chapter Conference. When evaluating this travel benefit, consider the following:

Funds and Fund Limitations

Have travel funds been incorporated into the annual budget or earmarked from reserves for chapter board travel? If so, how much and for how many board members? Secondly, what expenses is the chapter willing to cover, and are you clear regarding what those items are and any limitations? For example, the board might cover only transportation up to a specific amount or total costs up to a specific amount, which could include transportation, registration and hotel. If airfare is covered, will seat upgrades, travel insurance and baggage fees be covered? What fare class will be covered? It will be important to be clear regarding these expectations up front.

Eligibility

Who on the chapter board will be eligible for these funds? Are there any specific criteria to consider, such as are these funds only available if the individual's institution cannot support their travel? Or is this considered something available to certain board members, such as the current board president, if funds are available? Depending on the criteria used, the board should also consider how frequently one individual could access this benefit. Document the board's approval of this eligibility in your board meeting minutes.

Application/Request Process

Depending on who is eligible, the chapter board will need to decide how to handle the process of determining who will travel and to where. It could be as simple as a board conversation — i.e., our policy is for our chapter president to attend the CUPA-HR Annual Conference if funds are available and they are willing to go. Your board meeting minutes could note this conversation and that the chapter president is going to go — or — because they cannot go, another board member is going instead — and the board approves this expenditure.

It would be prudent to have a deadline each year by which a decision needs to be made.

Reporting Requirements and Deadline

As the chapter is expending funds for a specific purpose, documentation is necessary. Whether or not the chapter pays directly for expenses, retaining receipts and documentation of expenditures that are made in accordance with your policies is important. It is also important that you are clear regarding how soon these receipts are expected to be sent to your treasurer. For example, CUPA-HR requests expenses within two weeks of the travel dates.