

## Anchorage Board of REALTORS®

### Travel and Training Policy

The President-Elect and the Association Executive (AE) will set the discretionary travel schedule for the calendar year of their Presidency. Total cost of travel shall not exceed the **Travel Cap** as established in the annual budget of the Anchorage Board of REALTORS® (ABR).

At the discretion of the President-Elect, some of the allocated trips outlined in this policy *may not be funded*. Travel outside of the annual travel schedule must be approved by the board of directors in advance.

### Best Practices and Requirements for Travel Reimbursement

**Attendance:** To be eligible for reimbursement, the traveler must attend all respective sessions, meetings, and events based on the attendee's position and suggested by the AE and/or President prior to the event. Sightseeing and exploring should be planned during the evening hours and/or prior to or after the event and/or meetings, at travelers' own expense.

**Reimbursement:** Reimbursement requests must be submitted no later than 30-days after the completion of the trip.

**Travel.** Travel includes airfare, travel insurance, ground transportation to and from the airport(s), baggage fees, and mileage.

- **Airfare.** Reimbursement of airfare will be for 21-day advance purchase, round-trip coach airfare only. Tickets purchased less than 21-days in advance of travel will be reimbursed only on approval by the Board of Directors. Travel insurance is recommended. Receipts must be presented for travel reimbursement. Upgrades must be paid at the traveler's own expense.
- **Mileage.** Mileage is calculated at the current IRS mileage rate and calculated using a mileage app from one destination to the other. No receipts are required.
- **Shuttle, third party transport, taxi.** Receipts must be presented for travel reimbursement of shuttle, taxi, or third-party transport.
- **Vehicle rental.** Rental of a vehicle is discouraged. If this should occur, the driver will place this on their own credit card and provide proof of insurance. Reimbursement shall only be by approval of the board of directors.

**Lodging.** Reimbursement will be based on the hotel double occupancy room rate. Receipts must be presented for travel reimbursement. Upgrades must be paid at the travelers' own expense unless approved by the board of directors. Only one reimbursement will be paid if two or more eligible travelers share the same room.

**Registration.** Attendees will be registered for basic registration package. Receipts must be present for reimbursement. The attendee may purchase additional tickets for additional events, training, and/or meetings, at travelers' own expense. In most cases, the AE will register the attendee for the event. The attendee needs to follow cancellation policy to ensure a refund is received in the case the attendee cannot attend, or the non-attendee may be responsible for reimbursement.

**Other expenses.** Expenses not outlined in this policy must have prior approval by the ABR Board of Directors (i.e., event registration, special events/meals).

**Reporting requirements:** Upon completion of travel, a written report on the event is to be submitted to the ABR AE for the next board meeting packet following the travel. Report information will be shared with our membership via social media and/or newsletter.

## Employee Travel.

**Budget.** Staff travel shall be established in the annual budget and approved by the board of directors. If other travel arises, the board of directors must approve the travel in advance.

**ABR AE and Staff travel.** While traveling on ABR business, ABR will provide all airfare, lodging, per diem or actual cost of meals when meals are not covered in registration, transportation to and from the airport, airport parking, registration, and all other travel related costs.

**Per Diem.** Per diem is given to ABR staff only, prior to the event, and includes each day of the event, plus 2 travel days. No receipts are required for per diem. Per diem shall be established in the annual budget.

## Shared Services.

If there is a "*shared services agreement*" between ABR and another board or association, the travel expenses of the AE and/or staff will be allocated to both associations, provided:

- The President and/or President Elect of the other association attends the event;
- The training is directed to the performance of the AE and/or staff; or
- The training is for the benefit of both boards.

All travel costs shall be prorated and charged to the respective boards/association, based on the total amount of Primary REALTOR® members of each board/association.

## Allocated Travel | Budget Worksheet

**January - Alaska REALTORS® Leadership Conference** - The Alaska REALTORS® Leadership Conference includes leadership development training, guest speakers, RPAC event, and networking and all ABR members are invited to attend. This event is for the incoming Alaska REALTORS® Board of Directors to be installed and to hold their first BOD meeting. This meeting is one of two in-person Alaska REALTORS® board meetings.

01 TVL AR Leader in Anchorage - January	Reimbursable Participants	Hotel	Travel	Per Diem	Registration
<p>All ABR board members are encouraged to attend.</p> <p><i>No travel reimbursement is given by ABR for ABR BOD members attending this event.</i></p> <p><i>*When the ABR Association Executive or staff attending, does not reside in Anchorage, hotel will be provided.</i></p> <p><i>Attendance by shared AE and/or staff: Refer to Shared Services section.</i></p>	ABR AE	2-3	none	Meal actual	None
<b>Proposed Budget:</b>					

**February – March - Alaska REALTORS® Leadership Conference** - The Alaska REALTORS® monitors policy and legislative activities with potential impacts to the real estate industry in Alaska. The association, through its Political Action Advocacy is one of the best values for protecting the industry. The intent of the annual Fly-In is to visit and engage with elected officials, educate them about priorities/concerns.

02 TVL AR Leg Fly-In in Juneau – January – March	Reimbursable Participants	Hotel	Travel	Per Diem	Registration
ABR often requests the ABR Legislative (Advocacy) Chair and the ABR Association Executive to attend this trip.	ABR Legislative (Advocacy) Chair	1 ABR	Yes ABR	None	None
Only one member from the ABR BOD who serves on the Alaska REALTORS® BOD is reimbursed by Alaska REALTORS® for air travel and one night of hotel.	ABR AE	1 ABR	Yes	Meals actual	None
<p><i>Many meals are included in this trip.</i></p> <p><i>Attendance by shared AE and/or staff: Refer to "Shared Services section."</i></p>	<i>Alaska REALTORS® one ABR member serving on AR BOD</i>	<i>1 AR</i>	<i>Yes AR</i>	<i>None</i>	<i>None</i>
<b>Proposed Budget:</b>					

**March - AEI Conference – AE Training** – NAR sponsors the AE Institute in various locations. This is an annual event specific to AEs for networking, education, and professional development.

03 TVL AEI – March or April	Reimbursable Participants	Hotel	Travel	Per Diem	Registration
<i>Attendance by shared AE and/or staff: Refer to “Shared Services section.</i>	ABR AE	4 - 6	Yes	Yes	Yes
<b>Proposed Budget:</b>					

**May - NAR Mid-Year Legislative Conference in Washington DC** – NAR holds the Mid-Year conference in DC for Leadership to discuss national priorities and policy. In addition, the State delegates meet with the Congressional Delegation through the coordination efforts of the appointed Federal Political Coordinators (FPCs) and attends the Region 12 meetings. Local Association members may opt to attend at their own expense.

05 – TVL NAR Leg - May	Reimbursable Participants	Hotel	Travel	Per Diem	Registration
The ABR President represents ABR and travels to this event.	ABR President	6-7	Yes	None	None
The AE may travel to this event upon the request of the ABR President and if budget allows.  <i>Attendance by shared AE and/or staff: Refer to Shared Services section.</i>	ABR AE – if requested and/or budget allows	6-7	Yes	Yes	None
<b>Proposed Budget:</b>					

**June or July - AE GrowthZone Training** – GrowthZone offers the AE specified training for our CMS program. As long as ABR uses GrowthZone, this training should be budgeted and the AE and/or other staff should attend.

07 – TVL GZ in Minneapolis – June or July	Reimbursable Participants	Hotel	Travel	Per Diem	Registration
<i>Attendance by shared AE and/or staff: Refer to Shared Services section.</i>	AE	4 - 5	Yes	Yes	Yes
<b>Proposed Budget:</b>					

**August - NAR Leadership Summit** – NAR provides a leadership gathering for the AE and President-Elect for learning, NAR orientation, and relationship building for leadership. NAR provides two nights lodging and registration.

08 – TVL NAR Leader – August	Participants	Hotel	Travel	Per Diem	Registration
The ABR President-Elect and AE travels to this event.  <i>Attendance by shared AE and/or staff: Refer to Shared Services section.</i>	ABR President-Elect	1 ABR 2 NAR	Yes	None	None
	ABR AE	1 ABR 2 NAR	Yes	Yes	None
<b>Proposed Budget:</b>					

**September - Mediation Training** – NAR sponsors an annual Mediation Training for members who are interested in serving as a mediator/ombudsman for ABR. ABR is very low on trained mediators/ombudsman. A future focus needs to be made to train and retain ABR mediator/ombudsman.

09 TVL Mediator in Chicago	Reimbursable Participants	Hotel	Travel	Per Diem	Registration
ABR needs to build their mediators and ombudsman.	New Mediators	4-5 days	Yes	None	Yes
<b>Proposed Budget:</b>					

**September – Alaska REALTORS® Convention** – The Alaska REALTORS® Annual Convention is hosted by a Local Association on a rotating schedule as described in the Alaska REALTORS® Convention policy. At Convention an in-person board meeting is held, along with the General Membership for the annual election of officers and NAR Directors, as well as a vote on topics concerning the General Membership body.

The Convention is open to REALTOR® members, Affiliate members, and Local Associations. The content and theme vary based on the location and education cycle for licensee renewal.

<b>09 – AR Conv in various communities</b>	<b>Reimbursable Participants</b>	<b>Hotel</b>	<b>Travel</b>	<b>Per Diem</b>	<b>Registration</b>
<p>The ABR President, President Elect, and AE attend this event.</p> <p><i>Meals are typically included in registration.</i></p> <p><i>Alaska REALTORS® reimburses ABR members who serve on the AR BOD travel and 1 night of hotel.</i></p> <p><i>Attendance by shared AE and/or staff: Refer to Shared Services section.</i></p>	ABR President	1 AR 3 ABR	AR	None	Yes
	ABR Pres Elect	1 AR 3 ABR	AR	None	Yes
	ABR AE	4 ABR	Yes	Actual Meals	Yes
<b>Proposed Budget:</b>					

**November - NAR Conference and Expo** – NAR rotates east to west coast for its annual convention in November. The Annual Convention hosts governance meetings, Region 12 meetings, education and professional development for the AE and members. Local Associations may opt to attend at their own expense. The convention is also a means to honor the State REALTOR® of the Year (ROTY).

<b>11 – TVL NAR Conference and Expo</b>	<b>Reimbursable Participants</b>	<b>Hotel</b>	<b>Travel</b>	<b>Per Diem</b>	<b>Registration</b>
<p>The ABR President represents ABR and travels to this event.</p> <p>The AE may travel to this event upon the request of the ABR President and if budget allows.</p> <p><i>Attendance by shared AE and/or staff: Refer to Shared Services section.</i></p>	ABR President	6-7	Yes	None	Yes
	ABR AE – if requested and/or budget allows	6-7	Yes	Yes	Yes
<b>Proposed Budget:</b>					