

Peer Review Travel Policy

Effective 3/15/2017*

The Travel Policy covers travel activities, expenses and reimbursements associated with site visits for the American Alliance of Museums' (AAM) Museum Assessment (MAP) and Accreditation programs, and other assignments carried out on behalf of the MAP and Accreditation programs (including travel for Accreditation Commission meetings). The Travel Policy aligns with the Alliance's overall corporate travel and accounting policies, as well as policies governing federal employee travel since MAP is federally funded (through a Cooperative Agreement between the Institute of Museum and Library Services (IMLS) and AAM).

The site visit is a professional business trip that includes transportation, hotel accommodations, and meals. All reasonable and approved expenses directly related to a site visit (outlined below) are reimbursable. It is the peer reviewer's responsibility to report his/her actual travel and related expenses in a timely, responsible, and ethical manner. Peer reviewers are expected to use good judgment regarding travel-related expenses and will be reimbursed only for expenses directly related to their MAP or Accreditation assignments.

I. Accreditation vs. MAP Visits

MAP and Accreditation have differing reimbursement policies in some areas (detailed in this document) and use different travel reimbursement forms. The primary difference is:

- **Accreditation** peer reviewers are reimbursed for their expenses based on the actual amount spent, per supporting documentation.
- ***MAP** peer reviewers are reimbursed by a combination of per diem (a fixed rate for meals and incidentals based on destination) and actual cost basis (travel and lodging)
- Peer reviewers should ensure they follow the program-specific policies and use the correct form based on the type of visit.

The Travel Policy is also informed by who ultimately pays for the actual costs incurred by a peer reviewer:

- **Accreditation** site visit costs are paid for by the museum (AAM reimburses the peer reviewer and then bills the museum for the costs)
- **MAP** site visit costs are underwritten by the federal government (and supplemented by the museum if necessary)

Questions

Accreditation site visits: accreditation@aam-us.org or 202-289-9116

MAP site visits: map@aam-us.org or 202-289-9118

II. Travel Planning

It is mandatory that the peer reviewer communicate with the museum about the site visit dates before making any travel arrangements. The museum and peer reviewer should discuss all travel arrangements in advance, particularly if any unusual or high expenses are expected, to ensure that the plans and costs are reasonable, appropriate, and acceptable to both parties and AAM. Before making any travel arrangements (e.g. buying plane tickets), the peer reviewer and museum must confirm the dates and any specific parameters of the trip with each other in writing.

The host museum has the option of directly paying a vendor for a peer reviewer expense (e.g., having the hotel or airfare directly billed to the museum). Again, these details should be discussed between the museum and the peer reviewer as part of the travel planning. (**MAP visits:** If the peer reviewer anticipates that the total trip costs will exceed \$950, s/he must inform the MAP staff before obligating any funds (e.g., buying a plane ticket).)

III. Expense Reimbursement

All travel reimbursements must be requested by the peer reviewer using an AAM-provided form, and will be issued by AAM (MAP and Accreditation forms are different; ensure you have the correct one).

Museums should not reimburse the reviewer but may pay for meals, flights, or hotel costs directly. (For **MAP visits**: museums they pay for an expense (e.g., meal, lodging) on behalf of the peer reviewer and may submit a reimbursement request to AAM; they must adhere to all of the same policies listed here in order to receive reimbursement.)

AAM does not cover expenses for any guests accompanying a peer reviewer on an assignment; or personal/home-museum related business conducted during or in conjunction with the trip.

A. Timing

- Request for reimbursement of travel expenses, with the appropriate documentation (see below) must be submitted within 30 days of the site visit. This timing is very important to comply with the Alliance's financial management and standard accounting practices.
- The Alliance will issue a check or electronic funds transfer approximately 4-6 weeks from the time the reimbursement request is received.
- Overdue or incompletely documented travel reimbursement requests may result in a delayed or denied payment to the peer reviewer.

B. Pre-Visit Reimbursement

- The Alliance may reimburse a peer reviewer for expenses that are paid in-full before the visit, such as airfare, hotel or rental car, upon receipt of appropriate documentation of actual full payment.
- After the visit the peer reviewer must provide documentation of use of the service (e.g., boarding passes, hotel check-out portfolio, car rental detailed receipt, etc.).
- No pre-visit reimbursement will be given for estimated expenses, reservations held with or without a credit card, or expenses such as food, fuel, or taxis.
- If pre-paid arrangements were not fulfilled (e.g., visit was cancelled and not rescheduled), the peer reviewer is responsible for repayment of funds to AAM.

C. Documentation

Unless specifically noted, all expenses to be reimbursed must be documented. Peer reviewers must have a current IRS form W-9 on file with AAM to receive reimbursement.

Acceptable documentation:

- Itemized receipts (date, service description/list of items purchased, provider, and proof of payment)
- Credit card swipe receipts plus the associated itemized receipt
- For mileage: a printout of the route taken with mileage listed (from Google Maps, MapQuest, etc.)

Unacceptable documentation:

- Receipts that do list items purchased / itineraries without documentation of payment
- Credit card receipt that only shows amount charged without the associated itemized receipt
- Credit card statements/bills
- Hotel portfolios for meals charged to room without an accompanying itemized restaurant or room service bill

General

- "Itemized" is defined as a list of all the items purchased /description of the service provided
- Receipts must also bear the date, name of the service provider/vendor, and payment method
- Cash transactions where receipts are not traditionally provided (e.g., vending machines, tips, subway fares, etc.) are reimbursable to a maximum of \$15 each; they must still be described and listed with actual amount
- Receipts must be accompanied by a completed AAM Travel Reimbursement Form. Both should be submitted by email

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Accreditation

- All expenses are reimbursed based on the actual cost documented as described above. AAM will only reimburse expenses that are documented with an **itemized** receipt. See below.

Museum Assessment Program*

- **Travel and lodging expenses:** AAM will reimburse travel and lodging expenses only if accompanied by **itemized** receipts.
- **Meals and Incidental expenses:** MAP peer reviewers are not reimbursed based on actual expenses, but instead receive a **fixed per diem** for meals and incidentals. Therefore no receipts for these expenses are required.
- The daily expense allowance is based on location of the museum receiving the MAP visit.
- The per diem rates AAM uses are set by the General Services Administration. Look up rates and learn more here: <https://www.gsa.gov/perdiem>
- See the section on Meals below for more details on per diem.

D. Transportation

Reimbursable transportation expenses are those based on the most economical mode of transportation that is practical and reasonable, and a commonly traveled route consistent with the authorized purpose of the trip.

Air or Rail Travel

- Air travel should be arranged at least 30 days in advance in order to take advantage of more advantageous fares.
- Non-refundable tickets are preferred due to lower costs.
- AAM will reimburse for the cost of coach/economy class tickets only.
- Any upgrades, enhancements, or amenities (e.g., seating, boarding, early check-in, inflight wi-fi or movies/entertainment) are considered personal expenditures and will not be reimbursed.
 - This may be waived on a case-by-case basis for individuals who have health issues that require certain accommodations on flights; they must advise the MAP staff and get approval buying the ticket.
 - If upgrades are combined into the fare rather than itemized out as add-ons, the Alliance will reimburse the documented cost of a coach/economy class ticket for the same trip purchased at the same time. Peer reviewers must provide documentation that shows this.
- If personal or other business travel is combined into the fare, or if transportation arrangements include segments or start/return destinations unrelated to the site visit (e.g., personal or other business), the traveler should discuss with MAP or Accreditation staff how to determine, calculate, and document the portion that will be reimbursed. Usually the Alliance will reimburse the documented cost of a round-trip coach/economy class ticket to/from the peer reviewer's home airport and the museum purchased at the same time.
- Travel insurance purchased is not reimbursable.
- **Do not use** "miles" to purchase a ticket! AAM cannot reimburse tickets procured this way. Do not use a voucher or airline credit to purchase your ticket unless it was issued because the original site visit date had to be cancelled and rescheduled.

Private Vehicles

- Travelers may use their private vehicle as the primary mode of transportation if it is less expensive than using alternative transportation, if it saves time, or if flying is not advised for health reasons.
- The Alliance reimburses for mileage at the current standard federal mileage reimbursement rate.

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Refer to the Travel Reimbursement Form for the current rate.

- The cost of meals and lodging, parking, mileage, tolls, and ferries incurred while in transit by private vehicle transportation are reimbursable.
- Mileage should be documented by submitting a printout of the route taken with mileage listed (from Google Maps, MapQuest, etc.).
- Mileage costs should generally not exceed the cost of airfare, based on the regular coach fare available for the location of travel from a standard commercial air carrier.
- If use of a private vehicle as the primary means of transportation is necessary or more appropriate but more expensive than flying, the peer reviewer must inform the museum and the Alliance to ensure this is an acceptable and mutually agreed upon expense.
- Costs associated with extended stopovers or out-of-the-way mileage for personal or other business is not reimbursable by AAM.

Rental Cars

- A vehicle may be rented when it is a necessary and appropriate means of transportation.
- Rental car costs include mileage; therefore mileage is not separately reimbursable.

Ground Transportation

- Public transportation, taxis, shuttles, shared rides, Uber, local rail, etc. costs are reimbursable expenses.
- Limousine transportation is not reimbursable.

Other

- Parking (including airport and hotel) is reimbursable.
- Standard airline checked baggage fees for up to two bags are reimbursable. Fees for additional luggage and/or oversized/overweight bags are not reimbursable.

E. Lodging

- The costs of a room and taxes in a lodging establishment (hotel, motel, inn, B&B, Airbnb) are reimbursable.
- AAM will reimburse an additional night if it allows the reviewer to get a less expensive plane ticket and net an overall cost savings for the trip.
- In-room pay-per-view entertainment and other personal or hospitality services are not reimbursable (e.g., laundry, movies, gaming). The exceptions to this policy are Wi-Fi/internet connection and room service.

F. Meals

- AAM will not reimburse for meals not consumed by the peer reviewer (e.g., whole board working lunches or dinners, director's meal if have dinner with them, etc. – only the cost of the peer reviewer's meal can be reimbursed)
- AAM will not reimburse alcoholic beverage purchases
- AAM will not reimburse meal costs for spouses or guests
- AAM will not reimburse snacks or treats purchased by the peer reviewer for the museum staff or board
- "First and last day of travel" mean the days you depart and return home.

Accreditation

- Meals are reimbursed based on itemized receipts only. See the section on documentation above.
- All reasonable (see next bullet) food expenses for the peer reviewer that directly relate to the site visit are reimbursable. This includes meals and snacks during travel and at the final destination.

Museum Assessment Program*

- Meal costs – on travel days and on site – are not reimbursed on actual costs but covered in the form of a fixed per diem paid to the peer reviewer *after* the visit concludes.
- AAM uses the GSA "Meals & Incidental Expenses" (M&IE) for its per diem rates.
- The specific per diem amount is based on the destination city. Look up rates and learn more at:

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- AAM uses the GSA “Meals & Incidentals” (M&IE) per diem rates for the destination city as a *guideline* for what is considered reasonable for meal expenses.
- Accreditation peer reviewers are *not* paid a per diem or restricted to a fixed daily amount.
- However, the total meal expenses should stay within the cumulative M&I per diem amount for the entire trip (number of days x per diem) unless the museum or AAM staff has previously approved the expenditures.
- AAM reserves the right to disallow the amount of meal expenses that exceeds the cumulative per diem total. An exception to this policy is when one peer reviewer pays for the meal for both reviewers on one bill. In this case, expenses should not exceed twice the relevant per diem rate for that type of meal.
- Look up rates and learn more at: <https://www.gsa.gov/perdiem>
- Note that first and last day of travel are only allocated 75% of the published per diem amount.
- <https://www.gsa.gov/perdiem>
- The total amount for meals and incidentals paid is based on the sum of:
 - 75% of the published per diem applied to the first and last day of travel (i.e., two days)
 - 100% of the published per diem applied to each of the other days of the visit.
- If travel by car spans more than one day each way, only the first day each way is subject to the 75% rate.
- For visits that are completed in ONE day (including travel to and from the museum) 100% of the per diem applies.
- For visits that are completed in TWO days, 75% of the per diem applies to both days.
- Peer Reviewers can spend more than the per diem on a daily basis or cumulatively over the course of the visit but will not be reimbursed for the amount that exceeds the total allotted for the visit.
- Peer reviewers that spend less than the total amount allocated for the visit do not have to deduct or return funds.
- Tips are included in the meal reimbursement rate.
- Do not submit receipts for meals and incidentals.

G. Incidentals & Other

- “Incidental” expenses are fees and tips given to service providers such as airport porters, valets, housekeepers, and other hotel staff. Tips of reasonable and customary amounts are reimbursable. Tips to servers are considered part of meal costs; tips to drivers are considered part of transportation costs.
- Wi-Fi charges assessed by the hotel are reimbursable as an “other” expense and not considered an “incidental” expense.
- Museum admission to conduct comparative surveys or make a “secret shopper” visit the day before the visit is reimbursable.
- For MAP visits*, incidentals are included in the per diem amount. See the section on Meals above for more detail.

H. Alterations, Cancellations and Last Minute Changes

If travel has to be changed or cancelled, the peer reviewer must contact AAM staff immediately to discuss options. Alterations to travel tickets usually result in a change fee, an additional fare, or forfeiture of payment. Who is responsible for the cost and how it will be handled differs based on the nature of the situation (fare restrictions, airline policies, peer reviewer emergency vs. host museum change request, weather, etc.).

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I. Summary of Reimbursable Expenses

Yes:

- Coach/economy class air, rail, or bus fare
- Mileage for use of personal vehicle
- Rental car
- Ground transportation (airport shuttles, taxis, public transportation, etc.)
- Lodging in a commercial establishment (hotel, motel, inn, B&B, Airbnb)
- Airline standard checked baggage fee for up to two bags
- Meals enroute and at destination as part of your daily per diem (includes inflight meal purchase)
- Standard tips
- Parking (airport, hotel, on site)

No:

- Alcoholic beverages
- Personal / hospitality services (e.g., dry cleaning, in-room movies/games, etc.)
- Personal travel
- Travel upgrades/amenities purchased (seats, boarding priority, inflight wi-fi, movies, etc.)
- Expenses related to spouse/family/friend accompanying the peer reviewer on the trip
- Expenses related to other business enroute to/from the site visit destination or when at the destination
- Overweight/oversized checked baggage fees
- Unreasonable or unsubstantiated expenses
- Trip insurance

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