

GFDA Partner Travel Policy

Adopted 4/15/26

Our goal for Great Falls Development Authority, Inc. (dba Great Falls Development Alliance or GFDA) business travel is to make such trips as safe and productive as possible while being fiscally prudent with our limited financial resources. This policy establishes guidelines for travel by partners, contractors, consultants, board members, or other non-staff individuals (“Partners”) who travel on behalf of or alongside GFDA staff, where GFDA is paying for or reimbursing travel expenses.

The intent of this policy is to ensure reasonable, responsible use of GFDA funds while supporting the comfort, safety, and effectiveness of Partners conducting GFDA business. GFDA’s policy is one of neither profit nor loss to the Partner.

TRAVEL AUTHORIZATION & PLANNING

- All overnight and out-of-state travel must be pre-approved by the GFDA President or Executive Vice President.
- If GFDA is coordinating travel arrangements, Partners must coordinate through the designated GFDA staff member responsible for the trip or project.
- Partners making their own travel arrangements must obtain the most economical and reasonable airfare, lodging, ground transportation, and related arrangements.

ATTENDANCE REQUIREMENT

Partners traveling on GFDA-funded business are expected to attend and actively participate in the approved conference, meeting, or event schedule for which the travel was authorized. Failure to attend scheduled sessions or meetings without prior approval may result in denial of reimbursement for associated travel expenses.

CONDUCT WHILE TRAVELING

Partners are expected to conduct themselves professionally and in a manner consistent with GFDA standards.

- Alcohol consumption must be appropriate and limited to business meals or GFDA-sponsored events.
- Driving under the influence is strictly prohibited.
- Partners may not be under the influence (alcohol/ drugs) while representing GFDA in meetings or official activities.

EXPENSE REPORTING & REIMBURSEMENT

- Partners must submit a GFDA Expense Report within ten (10) business days following completion of travel.
- All expenses must be itemized and supported by required documentation.
- Expense reports must be approved by the GFDA President or Executive Vice President (or designee) prior to reimbursement.

Receipts issued by the service provider are required as follows:

- Lodging – Always required; itemized, must show date, hotel name, and location
- Transportation – Required except where not reasonably available (e.g., mass transit)

- Entertainment – Must include: names and affiliations of attendees; location and date; business purpose
- Meals and Miscellaneous expenses – Must show vendor, date, amount, and business purpose

Missing receipts must be documented in full (as listed above) and signed by the Partner.

Expense reports that are incomplete or improperly documented will be returned and may delay reimbursement.

AIR TRAVEL

Coach or standard class airfare is required for all GFDA-funded Partner travel.

Exceptions allowing first-class or upgraded airfare may be approved in advance by the GFDA President or Executive Vice President when:

- Coach or standard class airfare would require circuitous routing
- Coach or standard class airfare would require travel during unreasonable hours
- Coach or standard class airfare would greatly increase total travel time
- Use of coach or standard class airfare would result in additional costs that offset any fare savings
- Coach or standard class airfare would not reasonably accommodate physical or medical needs of the Partner
- The President or Executive Vice President has provided prior written authorization based on specific circumstances

Any approved exception must be clearly documented on the expense report.

Partners are responsible for airline tickets issued. Lost tickets must be reported immediately to the airline and GFDA Accounting. Unused airline tickets must be returned to GFDA.

GROUND TRANSPORTATION

Partners and Volunteers are expected to select the most reasonable and cost-effective ground transportation option consistent with business needs and travel schedules.

Rental Cars

We usually find that rental cars rather than use of personal vehicles result in a cost savings to GFDA. Use of rental cars must be approved in advance by the GFDA President or Executive Vice President. Economy or standard vehicles should be used unless business requirements justify otherwise. The Partner is responsible for providing insurance on the vehicle either through their own insurance, their credit card, or purchase of rental car coverage.

Taxi, rideshare, or limousine expenses should not be claimed when a rental car is used, except in documented extenuating circumstances.

Personal Vehicles

Partners may use a personal vehicle when it is the most reasonable option. Reimbursement will be made at the Federal Standard Mileage Rate. Proof of current driver's license and insurance must be provided to GFDA prior to travel.

If a Partner chooses to drive instead of using commercial air travel when air travel would have been reasonable, reimbursement is limited to the lesser of:

- Federal Standard Mileage Rate multiplied by miles driven, or
- Comparable coach or standard airfare based on a 14-day advance purchase

Cabs, Buses, Limousines, and Rideshare Services

Use of cabs, buses, hotel shuttles, limousines, and rideshare services (including Uber and Lyft) is allowable when reasonable and necessary for GFDA business.

- Itemized receipts should be provided whenever possible, including date, pickup and drop-off locations, and fare amount.
- When itemized receipts are not reasonably available, sufficient detail must be provided on the expense report to substantiate the business purpose.
- Daily lump-sum cab or rideshare totals are not acceptable unless clearly explained.

LODGING

Lodging must be selected within a reasonable distance of the approved meeting, conference, or event location and in a manner that does not result in excessive or unnecessary additional cost to GFDA for transportation, time, or related expenses.

- A detailed receipt is required; summary statements are not acceptable.
- Charges beyond the room rate (meals, valet, laundry, etc.) must be clearly itemized.
- Reasonable valet and laundry expenses are allowable for extended trips.

MEALS

Meals are reimbursable when travel requires being away from home or when part of a legitimate business meeting. Reasonable meal costs are appropriate to the location, duration, and business purpose of the travel; reflect customary pricing for similar establishments in the area; and are consistent with expenses necessary to conduct GFDA business. Reasonableness will be evaluated based on local market conditions, the business context of the meal, and whether the expense is proportional to the approved travel activity.

- Itemized receipts should be provided whenever possible, including date, location, and amounts.
- If paying for meals on behalf of others, list business purpose and names of those included on each receipt.
- When itemized receipts are not reasonably available, sufficient detail must be provided on the expense report to substantiate the business purpose.
- Excessive, luxury, or personal meal expenses may be denied reimbursement.

ENTERTAINMENT

Partners may be obligated to entertain business associates in the normal course of a business trip. Entertainment expenses may be reimbursed only when business associates are involved and the expense is reasonable, well-documented, and directly related to GFDA business.

- Itemized receipts are required and should include time, place, business purpose, names and business relationships of those involved.

NON-REIMBURSABLE EXPENSES

GFDA will not reimburse for:

- Personal entertainment expenses
- Expenses for spouses or guests unless pre-approved
- Non-business-related costs

EXTRA PERSONAL DAY(S)

Partners may choose to stay additional day(s) at the beginning or end of the trip and may do so entirely at their expense.

CANCELLATION

If a Partner needs to cancel a trip, the appropriate GFDA team member should be notified right away and every effort be made to recover expenses.

POST TRIP REPORTING

Partners should prepare to present a report and share notes on contacts made, information gathered, and the learnings and take-aways from the trip.

ACKNOWLEDGEMENT

I acknowledge that I have read, understand, and agree to comply with the GFDA Travel Policy. I understand that failure to comply with this policy may result in denial of reimbursement and may impact eligibility for future GFDA-funded travel.

Organization/Affiliation: _____

Partner Name (Printed): _____

Signature: _____

Date: _____