# TRAVEL (FOR ALLIES)

## INTERNAL POLICY

CODE: INV – PP Ally Travel

PREPARED BY: DAF and DI

REVIEWED BY: Executive Team

AUTHORIZED BY: CEO

EFFECTIVE DATE: **MAY/2022**

*Our Mission*

*"Operating from the global south, we foster collaborative processes to drive systemic changes for human dignity and planetary care"*

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## 1-DOCUMENT TYPE

**INTERNAL POLICY:** derived from INV - PG Social Investment Management

## 2-BACKGROUND:

Allies undertaking travel financed by Fundación Avina, need to follow our principles regarding **modesty and austerity** in their behavior and actions, in order to be consistent with the values we promote. Policy interpretation and implementation will take the following into account:

- Principle of **austerity and rational use of resources** in travel undertaken by allies and consultants involved in projects financed by Fundación Avina to implement and Social Investment, maximizing the benefits of the trip, in order to make optimal use of project resources.

- Travel is to be **planned well in advance**, in order to secure optimal rates and avoid additional costs and charges. Take steps to ascertain whether travel might be substituted with the use of telecommunications technology, such as email, online conferences (Teams, Zoom), or chat (Skype or WhatsApp), to name a few.

- The same principles and values lead us to a preference to travel on local carriers that apply **socially responsible practices**.

## 3-OBJECTIVE

This policy aims to set the standards for expenses incurred in travel undertaken by allies and consultants who participate in a Fundación Avina-organized and funded event or meeting.
It also applies to ally organizations executing a Fundación Avina-funded project who are considering travel to meet project objectives.
These guidelines have been established in accordance with our principles of austerity and maximizing resource utilization.

## 4-SCOPE

This policy covers allies and consultants who undertake travel with funds provided by Fundación Avina.

Avina manages resources from a variety of donors who may demand additional or higher requirements than those established in this internal policy. In such cases, the guidelines set forth by the donor shall prevail. The criterion will be to match the highest standard required.

## 5-DEFINITIONS AND ABBREVIATIONS

**Austerity:** quality of simplicity and self-restraint that characterizes a person.

## 6-DEVELOPMENT

### 6.1- TRAVEL EXPENSES

This section describes types, concepts and amounts of expenses authorized for work-related travel by allies and consultants who undertake travel financed by Avina, which will be accepted and reimbursed according to the specific procedure described in this document. It also describes the expenses that are excluded and constraints on expenses that Fundación Avina shall not reimburse or accept.

The principles of austerity and rational use of resources shall prevail in the interpretation of this section and in any project-related action.

### 6.1.1 - MEANS OF TRANSPORTATION

Avina allies and consultants will schedule travel on the most efficient and convenient means of transportation, keeping in mind the impact of the mode of transportation on the environment and climate change, and subject to the following guidelines:

- **Air travel**: For **airline ticket** purchases, booking economy class is the option that applies.
    - When the reason for travel is an Avina-organized meeting or event, Fundación Avina staff will coordinate the reservation. In the case of meetings and events organized by an executing ally institution in an Avina-funded project, the ally will be responsible for managing the airline-ticket purchase.
    - **Fines and penalties** resulting from changes in the scheduled itineraries shall be covered by the project allies or consultant, unless Avina has requested or authorized this under special circumstances.
    - When **submitting the tickets**, follow the donor-established requirements (for instance, in some cases the flight boarding pass might be required). Fundación Avina staff will keep travelers apprised of any special requirements.
    - Airport taxes will be accepted as eligible costs.
- **Taxi cabs and app-based transportation:** The use of reliable cab companies is recommended, especially to and from the airport. Indicate the route taken on the back of the voucher, or the use of app-based transportation services available in the region the trip will take place in (e.g., UBER, Cabify,...).
- **Bus:** a possibility is to opt for sleeper cars, when this means of transportation is convenient.
- **Train**: first-class travel by national and international train will be acceptable when this alternative is available and convenient.

### 6.1.2 - ACCOMODATIONS:

The principle of traveler **austerity and safety** needs to be kept in mind in the selection of hotels and any other decisions regarding trip expenses.

General guidelines for travel accommodations:

- Avina can accept the cost of stay in mid-range hotels, but not luxury establishments.
- When the reason for travel is an Avina-organized meeting or event, Fundación Avina staff will coordinate the reservation. In the case of meetings and events organized by an ally

organization executing an Avina-funded project, the ally institution will be responsible for managing the airline-ticket purchase.

**Non-Reimbursable and Non-Allowable Lodging Expenses:** Fundación Avina will not reimburse or accept additional non work-related lodging expenses. The following are provided by way of example:

- cost of sauna
- gymnasium
- movie rentals or other optional hotel services (except for internet access)
- cost of laundry (except for stays exceeding five nights)
- other similar non work-related expenses

### 6.1.3 - PER DIEM

Fundación Avina will reimburse per diem for meals and beverages incurred by ally organizations during travel, provided they adhere to the principles of frugality and resource optimization.

The following are some examples of maximum coverage:

- Breakfast: USD 10
- Lunch: USD 25
- Dinner: USD 25

**Alcoholic beverages will not be reimbursed**

### 6.1.4 - EXPENSES FOR MATERIAL PURCHASES

This refers to supplies needed to carry out the purpose of the trip, such as presentation materials, teaching aids, and the like.

These costs will be reimbursed, provided they were **previously approved** by the Avina team in an email.

### 6.1.5 - BANK CHARGES FOR INTERNATIONAL TRANSFERS

This is in reference to the bank fees and costs for transfers abroad for the reimbursement of travel expenses incurred by allies or consultants.

The maximum amount to be reimbursed under this item is US$50 per report and is subject to the project financier accepting this type of expense.

In the case of project consultants that Avina has engaged, the recommendation is that travel expense reimbursement be included in the same transfer as the fee payment.

### 6.1.6 - OTHER NON-REIMBURSABLE AND NON-ALLOWABLE EXPENSES

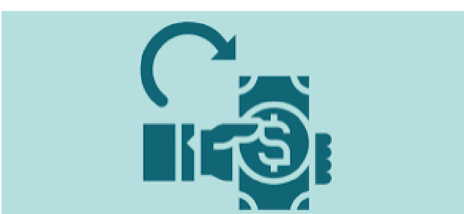
In addition to the aforementioned, Fundación Avina will not reimburse or accept the following expenses or costs:

- Expenditures for personal enjoyment or entertainment
- Purchase of medicine
- Vehicle rental
- Phone calls
- Travel insurance (the ally is encouraged to arrange for their own insurance prior to travel)
- Any other expense or cost not directly related to the purpose of the trip and outside the limits of the principle of austerity and rational use of resources.

### 6.1.7 – EXCEPTIONS

Should an ally or consultant find themselves in an extraordinary situation or context that justifies travel expenses not clearly established in these guidelines, they must relay this to their contact at Fundación Avina to report and request approval prior to incurring in the expense.

### 6.2- EXPENSE REPORTING AND REIMBURSEMENT PROCEDURE



**1.** The ally or consultant who is traveling to participate in an event or meeting organized by Avina must present an *expense report* before the lapse of seven days after the trip.

**2.** In the event that the ally or consultant has received an advance on expenses, the balance of the advance, if any, should be included in the Expense Report.

**3.** Initially, *the report is submitted by email*. Next, *the hard copy of the report is sent to the local office* where support documentation and amounts are reviewed to ensure it all complies with internal legal requirements.

**4.** In case of compliance, a document supporting the purchase of foreign currency, or other document *supporting the exchange rate* used for the expenses incurred, must be attached.

**5.** Reimbursement will be provided only for expenses *supported by original invoices and receipts*, with the nature of the expenditure detailed on the reverse side.

**6.** *Minor expenses* like taxi cabs, buses, subway, parking lots, may be reimbursed by presenting the receipt or ticket and a description of the trips and expenses involved.

**7.** *Credit card receipts* are not considered original receipts, so the corresponding invoice must be included in order to be reimbursed.

**8.** Concerning travel expenses for an *ally organization executing* an Avina-financed project, the organization is responsible for complying with the reporting guidelines in this policy and the expenses must be included, using the forms that Avina's staff will provide, within the deadlines defined in the agreement.

## 6.3 EMISSIONS MONITORING, REDUCTION AND OFFSETTING

Fundación Avina committed to becoming a **carbon neutral organization** by 2025. This includes systematically measuring its emissions, including those from direct operations and from projects it is involved in; and, to look into ways to reduce them, offsetting emissions that cannot be reduced through greenhouse gas emission offset projects.

Avina's environmental impact and GHG greenhouse gases emissions are mainly the result of the following activities: air travel, accommodations, holding events, land transportation. In order to adequately calculate emissions, the following information is needed: City of origin and destination of flights, number of days at hotel, details of ground transportation, among other details of the travel activities and events carried out in Avina-funded projects.

Below, find basic guidelines to reduce environmental impact and carbon footprint in our activities:


*More information is available on our website [https://www.avina.net](https://www.avina.net)*

## 7-RESPONSIBILITIES

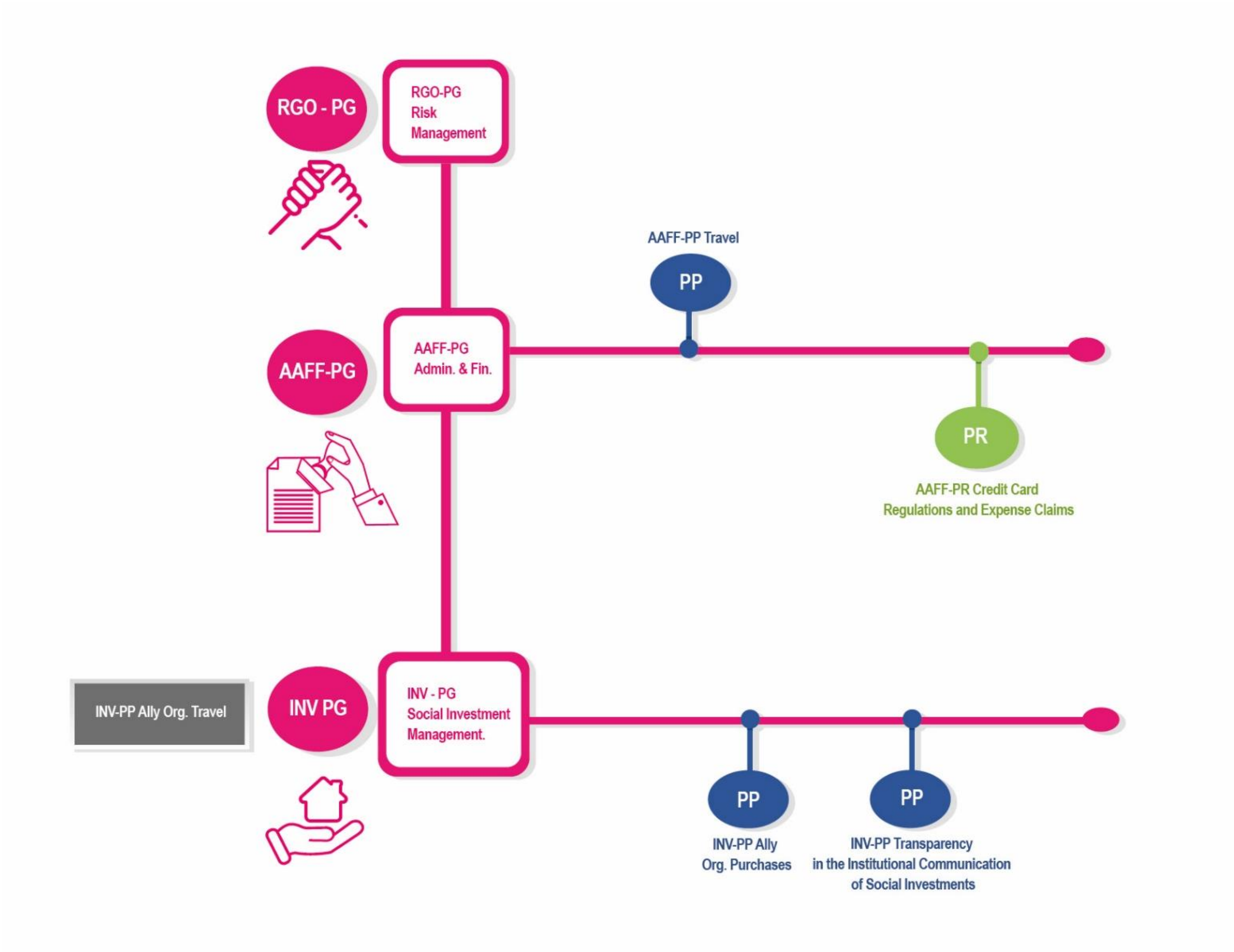
**Program Officers:** responsible for monitoring compliance with this procedure.

**Operating Unit Administrator:**

- Supports the airline ticket purchasing process and hotel reservations in cases that involve a Fundación Avina event or meeting.
- Monitor compliance with the Expense Reporting procedure.
- Approve the travel expense report the ally organization or consultant submits.

## 8-RELATED DOCUMENTS

**This policy is linked to- and involves the following documents:**

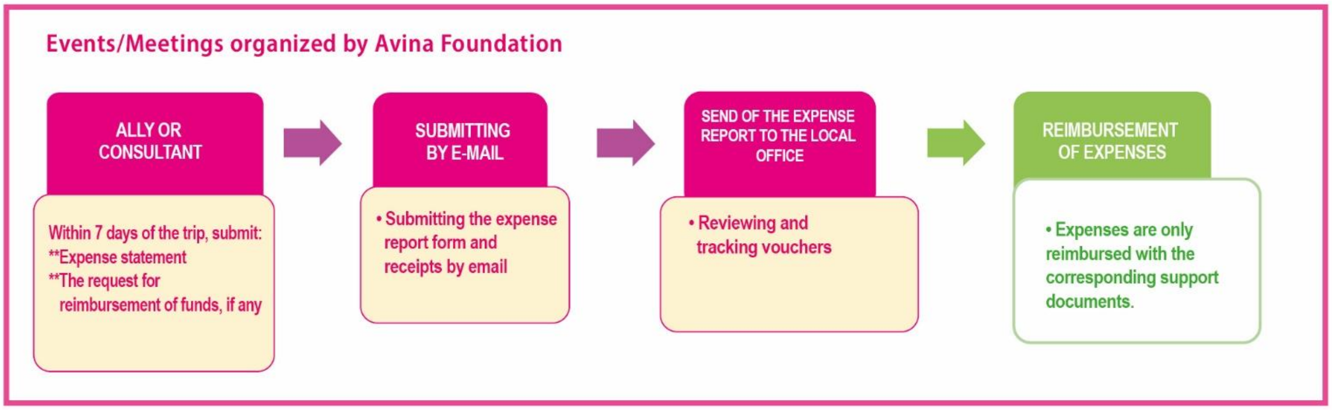


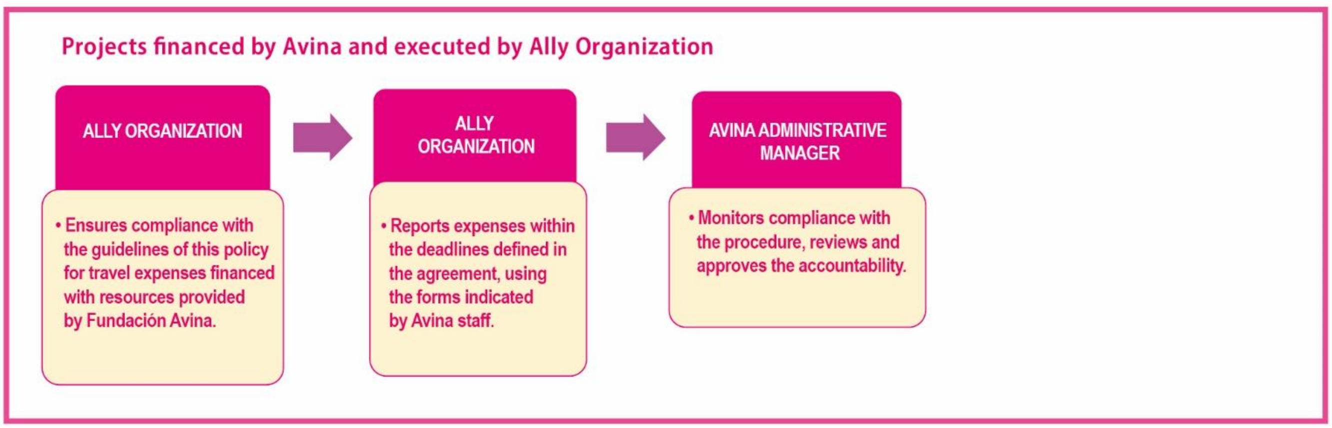

**Policy implementation requires the following forms for internal use:**

- Expense Report Form

## 9-GRAPHIC SUMMARY

- Graphic representation of the expense reporting process for ally organizations and consultants


Events/Meetings organized by Avina Foundation
ALLY OR CONSULTANT
Within 7 days of the trip, submit:
**Expense statement
**The request for reimbursement of funds, if any
SUBMITTING BY E-MAIL
• Submitting the expense report form and receipts by email
SEND OF THE EXPENSE REPORT TO THE LOCAL OFFICE
• Reviewing and tracking vouchers
REIMBURSEMENT OF EXPENSES
• Expenses are only reimbursed with the corresponding support documents.


Projects financed by Avina and executed by Ally Organization
ALLY ORGANIZATION
• Ensures compliance with the guidelines of this policy for travel expenses financed with resources provided by Fundación Avina.
ALLY ORGANIZATION
• Reports expenses within the deadlines defined in the agreement, using the forms indicated by Avina staff.
AVINA ADMINISTRATIVE MANAGER
• Monitors compliance with the procedure, reviews and approves the accountability.