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THE TRAVEL AND TRANSPORTATION ISSUE

We'll Get There Together: Risk and Reward in Nonprofit Transportation and Travel

By Rachel Sams

I recently took my first post-COVID business trip for NRMC, from my home in Albuquerque to San Francisco. NRMC Executive Director Melanie Lockwood Herman and I both found that our airline tickets cost at least 30% more than we might have expected a few years ago. I chose to spend an extra night in San Francisco so I could take a direct flight (only offered in the evenings), reducing my potential COVID exposure in airports and on planes.

During the trip, a risk assessment for a large nonprofit with more than a dozen program sites, we spoke with team members about the opportunities and challenges they face in their work. We saw, heard, and experienced things that couldn't have happened the same way virtually. The trip was a great investment of time and the project budget. But the calculations were complex.

It's always been a challenge to figure out how to move people around for your nonprofit—from transporting staff or clients to daily activities, to planning business travel. Those logistics grew

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more complex and nuanced during three years of a pandemic. We learned more and thought more about health, safety, cost, and environmental issues than ever before. This level of complexity in travel and transportation is a constant for nonprofits now. Navigating it can make us all better at our operations, and help us more effectively execute on our missions. After all, considering human health and environmental justice should be part of decision-making for organizations that seek to make the world a better place.

But repeatedly making complex decisions about travel and transportation takes time and energy, and decision fatigue is real. We'll approach travel and transportation for our organizations more effectively if we have frameworks that help us consider safety, health, effectiveness, and sustainability. In this article, we'll look at some major decision points for nonprofits when it comes to travel and transportation, and help you think through ways to approach them.

Transporting People: What to Consider

Maybe your nonprofit transports hundreds of children on camp outings every summer. Maybe a handful of your employees occasionally drive a work vehicle or use their personal vehicle when traveling on nonprofit business. Either way, you have transportation-related opportunities and challenges to assess.

Here's what to think about when it comes to **your drivers**.

Know who drives for your organization. If you have a fleet, you can easily identify who's on the payroll as a driver for your nonprofit. But your policies, procedures, and risk approach should account for every person who drives on your nonprofit's behalf—whether they're at the wheel of the organization's vehicle, a rental vehicle, or a vehicle they own.

Establish driver standards and hold everyone to them. Establish driver screening and safety standards that suit your mission, circumstances, and resources. Make sure you understand if the insurer providing coverage for your vehicles has minimum requirements and find out if they offer free or discounted resources, such as background checks, online driver safety training and more. Establish disqualifying criteria for drivers before you check motor vehicle records. Full-time drivers should be required to complete written driving tests and road tests to your satisfaction. Remember to verify driving certifications, and comply with all relevant driver qualification standards for commercial vehicles.

Train your drivers. Your nonprofit's driver safety training should cover your organization's policies and procedures, accident reporting, and required vehicle maintenance and inspections. Include training on how to stay alert while driving, avoid distractions, drive defensively, navigate road conditions, and properly use vehicle equipment.

Make driver recruitment and retention a priority. Across the country, cities and school districts struggle to find bus drivers. These can be challenging jobs, and your nonprofit will need to demonstrate that it cares for and supports its dedicated drivers. Offer as much schedule flexibility as possible, pair new drivers with mentors, invest in vehicles that provide comfort and safety, and tap into technology to streamline drivers' workloads and make navigation easier.

Give special consideration to how you work with any volunteer drivers who will use their personal vehicles. Screen volunteers for experience and skill, and ensure they provide proof of a valid license and vehicle registration. Create guidelines for volunteer drivers, covering issues like how many passengers they

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> "Give drivers the opportunity to share their needs and wishes before your nonprofit makes its vehicle selection."

can transport at once and whether they can transport passengers alone. Conduct orientation and training for all volunteer drivers. Select a driving program supervisor to assign volunteer drivers, monitor their work, and terminate volunteer drivers if necessary. Educate volunteers about where your nonprofit's non-owned automobile coverage does and does not apply.

You've paid careful attention to selecting and training your drivers. What about your vehicles? Here's what to consider in **vehicle selection**.

Know how your nonprofit will use its vehicles daily. How many passengers will you transport? Will you haul cargo, and if so, what kind? Fleet management company Union Leasing recommends that organizations buy vehicles that will meet their passenger needs 90% of the time. You can always rent a vehicle for one-off occasions.

Know what level of performance you'll need from your vehicles. Where will your team members drive this vehicle—in cities or rural areas, on paved or unpaved roads or off road? What will the mileage for your typical trip be?

Assess driver needs. Will your drivers need accommodations or modifications to be comfortable in your vehicles? Give drivers the opportunity to share their needs and wishes before your nonprofit makes its vehicle selection.

Assess technological and environmental needs. Determine what

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kinds of technological assistance your nonprofit needs in its vehicles (such as synchronizing cellphones with vehicle Bluetooth systems, navigation systems, or backup assistance technology). Consider how electric and hybrid vehicles, fuel efficiency, and other vehicle sustainability offerings dovetail with your organization's mission and how much priority you want to place on them. And make sure to consider privacy and security concerns with any technologies you evaluate. For more, see our article "Transport Technology For Nonprofits" in this issue.

Consider your nonprofit's future vehicle needs as well as its current ones. Think about how you might need your fleet to scale with your operations. Could your program growth plans require you to transport more passengers? Expand into new geographic areas? How can you work within your current budget to lay the foundation for a scalable fleet operation?

Business Travel: Risk and Reward

If your nonprofit team members travel to conferences, trainings, or meetings, they've probably noticed more crowded highways, hotels, and skies. Recently personal travel has surged as families embark on vacations and family trips they postponed during the pandemic. Business travel buyers' domestic bookings have returned to 72% of their pre-pandemic levels, according to the Global Business Travel Association's April 2023 poll. Around the world, business travelers are projected to spend over $1.1 trillion on travel this year.

Air travel and event costs, hotel rates, and flight cancellations have spiked as travel businesses deal with infrastructure challenges and staffing shortages. Your nonprofit's team members may have navigated more canceled or delayed flights or long airport security lines.

The first question when your organization ponders a business trip is the same as it always was: Are the benefits of the trip worth the risks? But the calculation looks different now, based on what we've all learned these past few years.

Organizations now know how many three-day jaunts of the past really could have been a two-hour videoconference. Nonprofits must weigh the risk of employees contracting COVID on a work trip or getting stranded due to airline meltdowns. And organizations that place a high priority on sustainability might avoid air travel as much as possible, due to the high carbon emissions of an airplane flight.

Here are some tips to help you weigh the value of a trip and figure out how to get there.

Assess your "why" for the trip. Why is this travel important to your nonprofit? What do you hope to accomplish at your destination? How else could you connect with the people you hope to connect with there? Could you make effective connections virtually? How extensive are COVID cases at your destination, and what's the capacity of the health care system there if you get sick or injured? What can you only accomplish, or most effectively accomplish, in person?

Remember that many possibilities exist beyond "go" and "don't go." Maybe you could condense a series of in-person meetings with a potential funder into a single trip, supplemented with virtual meetings. Maybe you could drive instead of fly. Maybe you could take a direct red-eye flight to your destination instead of a daytime itinerary with a layover that increases your potential exposure to COVID. In most cases, if your destination is more than 300 miles away, it will be faster to fly. But consider all the costs of your trip: gas, tolls, parking—and the potential penalty cost of being stuck in an airport or dealing with rush-hour traffic.

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"A solo business traveler who drives might produce more carbon emissions than they would if they booked a single seat on a short flight."

Do a lot while you're there. Consulting firm Korn Ferry suggests organizations try to arrange one meeting for every hour of travel time. So, if a flight takes four hours, aim to line up four meetings at your destination. Korn Ferry is a for-profit company; as nonprofits, our calculations might look different, but this principle can help organizations form their own guidelines.

Keep your travel policies flexible. Consult our policies and procedures article in this issue to help with that.

Consider sustainability. About 90% of the carbon emissions from business trips come from air travel, and many nonprofits have set targets to reduce their environmental impact. Pay attention to the details: A solo business traveler who drives might produce more carbon emissions than they would if they booked a single seat on a short flight.

The Global Business Travel Association encourages travelers to find the lowest-emission travel option. Encourage direct flights over layovers where possible. Encourage your team to choose accommodations close to your meeting and walk or take public transportation if possible.

Consider the local economy and local communities. Can your organization connect with a destination marketing organization or tourism nonprofit that serves the destination community? Those suggestions came from Wesley Espinosa, interim executive director for the Center for Responsible Travel, on the Global Business Travel Association's May 19 Business of Travel podcast. With a better understanding of local issues and dynamics, your nonprofit can invest its time and travel budget into vendors and meetings that give more than you take from the place you're visiting—a concept Espinosa calls "regenerative travel."

More destinations are inviting business travelers to opt into this concept.

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In Banff, Canada, groups hosting meetings can put in money alongside Banff's destination marketing organization for a prepaid card attendees can use to make purchases with local vendors, GBTA's Kelsey Frenkiel said in a podcast. Frenkiel noted that the card can replace "conference swag," the promotional items given to conference attendees. Conference swag often ends up in landfills, and many groups want more sustainable alternatives.

Take some time to process your experience. It's easy to jump right back into your regular routine after travel—because no doubt, your regular daily tasks piled up while you were away. But take a moment to celebrate a successful trip, or to acknowledge that you handled challenging situations during travel to the best of your ability. Recall the new things you saw, heard and experienced. What did you learn? What will stay with you?

Bring It All (And All of Us) Together

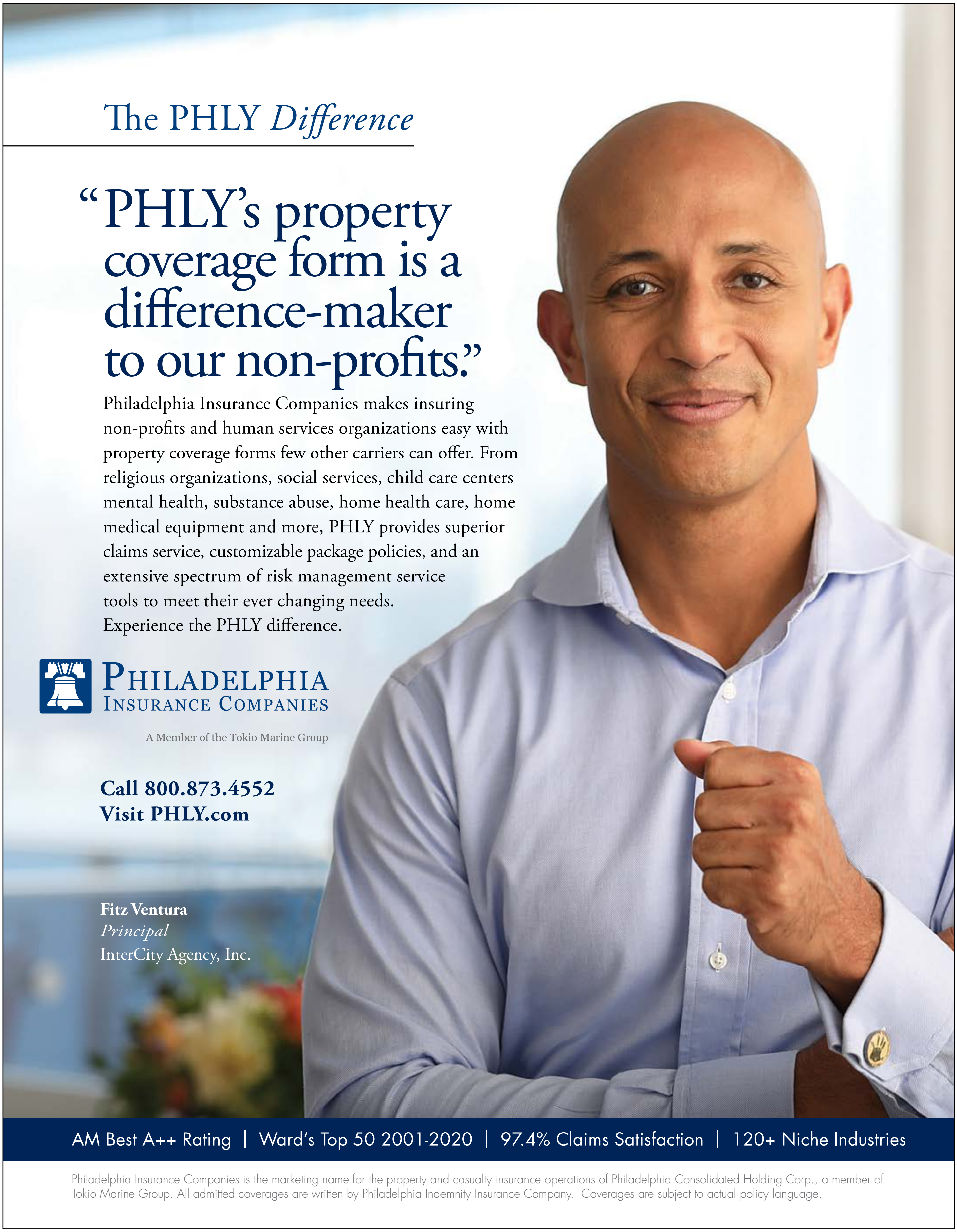
Whether you're transporting clients to an event or taking your team to a conference for the first time in years, we go places to connect with each other. The past few pandemic years have reminded us how important that is. With careful attention to the travel and transportation issues in this article, your nonprofit can navigate the risks and reap the benefits of connection.

I recently traveled from Albuquerque to Denver for NTEN's Nonprofit Technology Conference, driving in order to stay for the weekend, visit family, and avoid airport and airplane COVID risk. It was NTEN's first in-person conference since 2019, and more than 1,500 people attended. We heard thought leadership from Dr. Safiya Umoja Noble, Professor in the Department of African American Studies and Department of Internet Studies at the University of California at Los Angeles; Mesiah Burciaga-Hameed, board chair of Native Land, an Indigenous-led nonprofit that created a searchable map of Native territories, languages, and treaties; and Evan Greer, director of digital rights organization Fight for the Future. Their words challenged my thinking on nonprofits' relationship to artificial intelligence, capitalism, and much more. I took part in small-group talks with thoughtful peers about trauma-informed nonprofit practices and how to navigate (or opt out of) social media in our sector. I learned skills that will help me and NRMC make our communications more accessible, navigate a website redesign, and continue to improve cybersecurity and data privacy at our organization. I'm a career changer who made the move into risk management in early 2022, and NTC was my first community experience as a nonprofit professional.

The six-hour drive north to the conference took me eight. A backup in Colorado Springs due to an accident put me in Denver at the height of rush hour. I had plenty of time in traffic to reflect on how frequent, short, and affordable flights between Denver and Albuquerque are. But as the meeting wound down a few days later, NTEN's conference app buzzed with photos of hours-long lines at security at Denver International Airport. By comparison, my weekend drive home with my husband, who'd flown up to join me, felt relaxing.

All travel and transportation decisions about risk involve tradeoffs, and some luck. With the right tools to navigate key decision points, you can find paths that make sense for you and your nonprofit. That will give you the foundation for a productive journey, whether luck is on your side or not.

Rachel Sams is a Consultant and Staff Writer at the Nonprofit Risk Management Center. During the height of the COVID pandemic, she didn't travel further than 100 miles from home for three years. This year, she has seven trips on her schedule, with more to come. Reach her with thoughts and questions about nonprofit transportation and travel risk at Rachel@nonprofitrisk.org or 505.456.4045.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Transport Technology for Nonprofits: Maximize Benefit, Address Potential Harm

By Rachel Sams

If your nonprofit transports the people you serve, it's time to step up your knowledge of technology.

The array of tools marketed to help organizations transport people safely and efficiently exploded in recent years. Options range from telematics to vehicle sensors, cameras, interactive dashboards, and autonomous technologies such as parking assistance. Advances in electric vehicles and fuel efficiency provide new opportunities to make your fleet greener.

But to determine what options are right for your organization, you'll need to consider much more than cost. New technologies raise concerns about privacy, cybersecurity, equity, and much more. As your nonprofit evaluates its transportation options, here are some things to think about on the technology front.

Vehicle Technology: What's on the Market

If your nonprofit has shopped for new vehicles in recent years, you've likely encountered the term **telematics**. The term combines two sciences—telecommunication, or exchanging information through telephone lines or wireless connections, and "informatics," computer system processing to store and retrieve data. Telematics allows organizations to receive and examine data about their vehicles, with the aim of making their systems more efficient.

Telematic systems center on mobile devices that transmit data from the field to a server. The data typically includes GPS location information and other details from a vehicle's diagnostic system. Nonprofits might expect to pay $25 to $45 per vehicle per month for a fleet management system that includes these features.

Organizations can use telematics data to observe driver performance and coach drivers on safe driving behaviors. Nonprofits can also identify areas of potential waste in their fleet, such as drivers idling in traffic, and revise route plans to maximize efficiency. They could monitor vehicle health and adjust their preventive maintenance plans. Nonprofits could tap into telematics to help drivers avoid bad weather and traffic jams, or sync the information with payroll systems to eliminate manual hour entry by drivers.

Your organization might not be the only one that seeks telematics data on your fleet. Insurance companies increasingly use telematics to evaluate risk in driver behavior as a data point for underwriting. Telematics data could also be used to determine fault after an accident. A telematics system typically consists of many pieces. **Vehicle sensors** measure

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changes in your vehicle's experience, from temperature and lighting to sound, pressure, and movement. Sensors can connect with other devices to communicate that data to the cloud, where dashboards and online management systems can access the information. The sensors can alert drivers to mechanical issues with vehicles, or track movement or the opening of doors to guard against vehicle theft, according to Samsung.

Monitoring vehicle performance has the potential to make fleet maintenance more efficient and predictable. Systems can provide reminders for preventive maintenance or alert organizations to an issue before a dashboard warning light would typically do so.

Telematics also brings a variety of options for **parking assistance**. Commonly available options now range from steering for the driver to completely taking over parking when the driver steps out of the vehicle, according to J.D. Power. A common option handles steering when a driver parallel parks. The driver uses the accelerator and brake pedals to move the car and shift gears. This type of technology can also find a properly sized space for your vehicle. In some cases, the technology offers the driver assistance to exit a parking space.

Some systems take full control of a vehicle for both parallel and perpendicular parking, while the driver activates the technology and remains alert to take control if necessary. Other systems let the driver remotely operate parking assistance technology while standing outside the vehicle. These systems can help navigate the bumps of parking, but they typically take time to operate, which can cause delays. And J.D. Power notes that if the car hits an obstacle, another vehicle, or a pedestrian, the vehicle owner will be liable for damages, not the automaker or the technology provider.

Many telematics systems integrate **backup cameras** and **dash cams**. Backup cameras (often called rearview cameras),

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mounted on the outside rear of a vehicle, record the road behind a driver. Typically used with an in-cab monitor, they can help drivers see objects or people when moving in reverse, and the cameras' footage can be used to gather information after a "fender bender" or rear-end accident. Dash cams, installed in the cab of a vehicle, record footage of the road ahead or activity inside the cab.

You're probably already thinking about the safety, security, and ethical considerations these technologies raise. We'll return to this important subject, but first let's explore how advances in electric vehicles and fuel efficiency are impacting fleet management.

Plugging In: What You Need to Know About Electric Vehicles

By 2030, electric cars will represent 60 percent of vehicles sold in the United States, China, and the European Union, according to the International Energy Agency. As electric cars and hybrid gas-electric vehicles grow in popularity, they bring fleet managers new opportunities and challenges.

Your nonprofit will incur much lower fuel costs if you purchase electric or hybrid vehicles, and may be able to take advantage of electric vehicle incentives. EVs have fewer moving parts that can break down. But battery technology comes with its own costs and logistical considerations. Here are some things the U.S. Department of Energy recommends considering as you evaluate whether to purchase electric, hybrid, or gas-powered vehicles for your fleet.

- How far will your nonprofit drive its vehicles? Will vehicles mostly be driven on highways, or in stop-and-go city traffic? A battery-powered electric vehicle may be ideal for drives of 100 to 300 miles a day, with the option to plug in at night. Electric vehicles could exceed that mileage range if they have additional charging options during idle periods. Otherwise, a hybrid vehicle could be a better option.
- What environmental factors must your vehicles stand up to? Will they be driven in extreme cold or heat for parts of the year? What terrain will they have to cover—mountainous areas, unpaved roads?
- How much heating and cooling use do you expect for your vehicles? How much would that draw down a vehicle battery? Will you need optional auxiliary power or heating and cooling units that run on diesel or another fuel?
- What kinds of electric vehicle charging options exist on the typical routes your vehicles will travel, and how much do they cost?
- What is the dealer's battery replacement policy? How much will batteries likely cost, and how will battery disposal be handled?

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- Are enough of the vehicles available to meet your needs? What vehicle maintenance and support options exist, and can the vehicles be serviced locally?
- Will your organization need to invest in charging equipment?
- Could your organization take advantage of federal, state, or local incentives for purchasing electric vehicles?

Fleet management for electric and hybrid vehicles brings new considerations around telematics. Charging electric and hybrid vehicles takes time, and it's important to consider how to avoid long waits for your vehicles at charging stations. Remote monitoring of battery charge status and charging history can help with this. You may also want to monitor how batteries are being charged, to ensure charging methods don't degrade battery life. Keep a close eye on vehicle mileage to help you understand how variables like weather and altitude affect your electric vehicle's charging range.

Experts urge fleet managers who use electric vehicles to choose a telematics platform that's versatile and works independently of your hardware. If your fleet includes different brands of electric or hybrid vehicles, or hardware from different manufacturers, select a telematics platform that's not tied to any hardware manufacturer. Forbes recommends seeking a platform that has an "uptime" of more than 99.5 percent to indicate performance reliability.

Ethical Concerns with Vehicle Technologies

Artificial intelligence helps power many of the advances in vehicle technology. Machines or processes that use AI respond to input similarly to the way humans would. AI systems can learn and adapt based on the information they gather, according to the Brookings Institution.

When most of us consider the ethical

implications of artificial intelligence in vehicle technology, we might think about scenarios like this one posed by UNESCO: "Imagine an autonomous car with broken brakes going at full speed towards a grandmother and a child. By deviating a little, one can be saved. This time, it is not a human driver who is going to make the decision, but the car's algorithm. Who would you choose, the grandmother or the child? Do you think there is only one right answer?"

Nonprofits don't yet have the option to purchase fully autonomous cars. But they can purchase park assist technologies that take some of the decision-making of driving out of the vehicle operator's hands, presenting new safeguards and very real new safety concerns.

And nonprofits have many options to purchase technologies that use algorithms to monitor human behavior, like what a driver does in the cab of a vehicle, how long they stop, or how they brake. Dash cam footage could help exonerate a driver who was racially profiled and unfairly accused of causing an accident. Dash cam footage could also be used to find a reason to fire a driver—a reason that's not equally applied to drivers of other races, genders, or abilities.

As you introduce more technology into your nonprofit's vehicles, you introduce new ways to keep your staff and the people you transport safe. You also increase the risk of violating an individual's privacy, introduce new distractions on the dashboard of your vehicle or in the cab, and give cyberhackers more access portals. You introduce more tools—algorithms—that make decisions that may be based on biased data and could discriminate against marginalized individuals and groups.

Here are some ethical questions posed by Automotive World that can help you evaluate your nonprofit's vehicle technology options.

- How do the systems you're evaluating collect data? How diverse are their data sources and how relevant are they to the context in which they are being deployed? How do systems use the data? Where do they store it? Who can see it? How does it benefit drivers,

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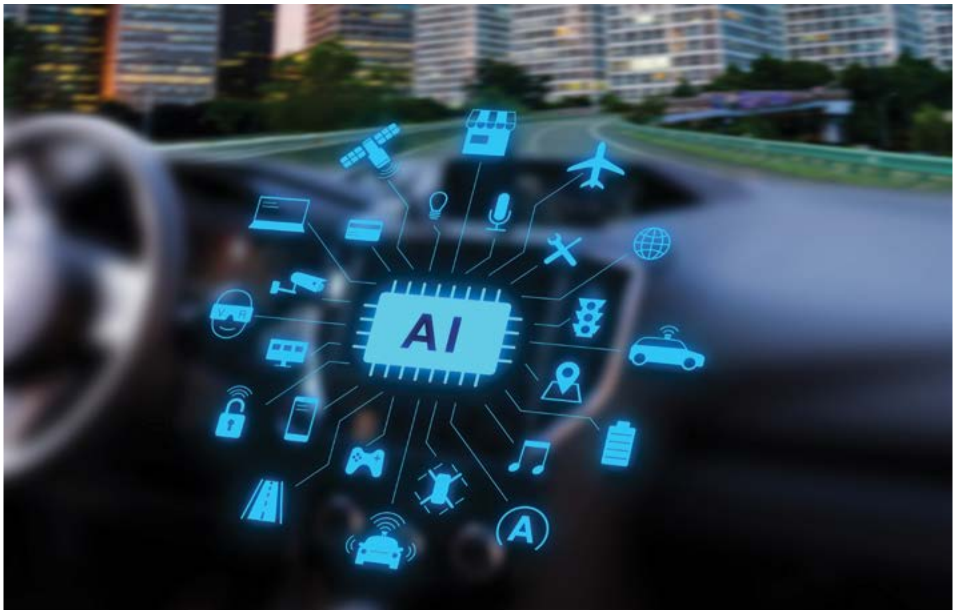

passengers, and the organization? Who could this data harm and how?

- Can you limit the data your nonprofit collects? Could you collect only statistics, without gathering any personal information or identifiable data? Can you avoid sending data to the cloud? Can you ensure videos that don't involve accident footage aren't archived?

Other strategies to set ethical boundaries around the use of artificial intelligence in your fleet:

- Ask vendors what safeguards they have in place to guard against cyberbreaches of their technology. Consider whether the safeguards match the sensitivity level of the data the vendors' systems would collect and store.
- Ask yourself: What pain point do you want AI to help solve in your fleet management? Choose one and monitor it closely before expanding your use of AI. Beth Kanter, co-author of *The Smart Nonprofit: Staying Human-Centered in an Automated World*, shared this strategy on a recent webinar. Kanter urged nonprofits to consider: Where is that place in your organization where you don't have enough time to do something important? How could artificial intelligence address it? What should the machines do? What should the people do? What safeguards will you put in place to minimize harm? Focus on that one potential use of AI and test it with clear boundaries before you go any further.
- How can you ensure that no technology is used or deployed in your organization without human oversight? Humans should carefully evaluate any use of AI in your organization before, during, and after implementation, and they should have clearly defined goals for doing so.

Go Beyond the Binary

In just the past few months, the conversation around artificial intelligence and its risks has exploded. Many enthusiasts tout AI as a way to eliminate boring but necessary tasks that distract organizations and people from what really matters. Skeptics focus on AI's very real capacity to do harm. To be responsible consumers of vehicle technology, your organization will need to do its research and think through the benefits, problems, concerns, and opportunities AI poses for your nonprofit's vehicle operations.

At nonprofit technology organization NTEN's annual conference in April, Dr. Safiya Umoja Noble, faculty director of the University of California at Los Angeles Center for Race and Digital Justice, urged the audience to go beyond the typical analysis that artificial intelligence is a tool that can be used for good or evil.

Technology is a social, economic, and political practice, Dr. Noble said. When we understand that, we can ask different questions about technology. That, she said, can help us understand what we gain and lose from current technology practices, and how we need them to change.

Nonprofits may feel an urgent need to invest in the latest automotive technology for their organizations, fearing that even what's on the market now will be obsolete in no time. But we urge you to apply the same type of analysis to telematics and other uses of transportation technology that you would in launching a new program. Who could benefit and how can you maximize those benefits? Where might your organization's use of vehicle technology cause harm? How can you avoid or mitigate that harm? What potential challenges is your organization equipped to navigate and which ones are beyond your scope?

Responsibly deployed technology can keep your nonprofit and the people you serve safer. It can make your organization more environmentally responsible and more informed. That takes time, thought, and care. Don't skimp on it—and don't rush into investments that could harm more than help.

Rachel Sams is a Consultant and Staff Writer at the Nonprofit Risk Management Center. Like many of you, she's reading everything she can get her hands on about artificial intelligence, and her opinions, hopes, and concerns about AI change by the day. Reach her with questions or thoughts about AI and technology in nonprofit transportation at Rachel@nonprofitrisk.org or 505.456.4045.

Destinations Unknown: How to Create Travel and Transport Policies that Balance Safety and Flexibility

By Melanie Lockwood Herman

If you haven't updated your travel and transportation policies lately, they may be out of sync with your current reality. This article explores a pragmatic approach to creating new or updated travel and transport policies that will help you get out in the community where your mission comes to life.

Make Traveler and Community Safety Top of Mind

Three years of managing through a global pandemic reminded nonprofit leaders that personal safety is key to mission success. In the pre-pandemic era, many nonprofit travel policies focused on the twin pillars of cost and compliance. Such policies reminded employees to always choose the most economical mode of travel, while imposing strict requirements for use of organization credit cards and completion of expense reimbursement forms.

While cost and compliance remain valid considerations, in today's new reality, safe travel practices should headline travel communications. Staff whose travel choices put cost ahead of safety cannot be effective mission ambassadors. Remember that negative experiences leave a deeper imprint than positive ones. You're more likely to remember the one time an airline lost your suitcase than the dozens of times your bag arrived safely. One business traveler we spoke with for this story explains: "We were required to stay in a dumpy hotel to save a few bucks; next time I'm asked to travel, I'm going to find an excuse not to. It was impossible to sleep with the noise happening in the rooms on either side of mine."

Heather Chadwick, Director of Risk & Policy at Teach For America (TFA), told me that TFA now prohibits staff from using "any home-sharing services (Airbnb, VRBO, HomeAway, etc.) for lodging, since laws for such services vary for each state and these services may create greater safety, security and harassment risks compared to hotels offered through our centralized travel booking site. We are aware that home-sharing can sometimes be more economical, but we do not allow exceptions because of our concern for the safety of the TFA team." TFA also keeps safety top-of-mind for vehicle rentals. Heather reports that TFA staff may "not use any peer-to-peer car rental services (Getaround, Turo, Maven, etc.) for transportation since laws

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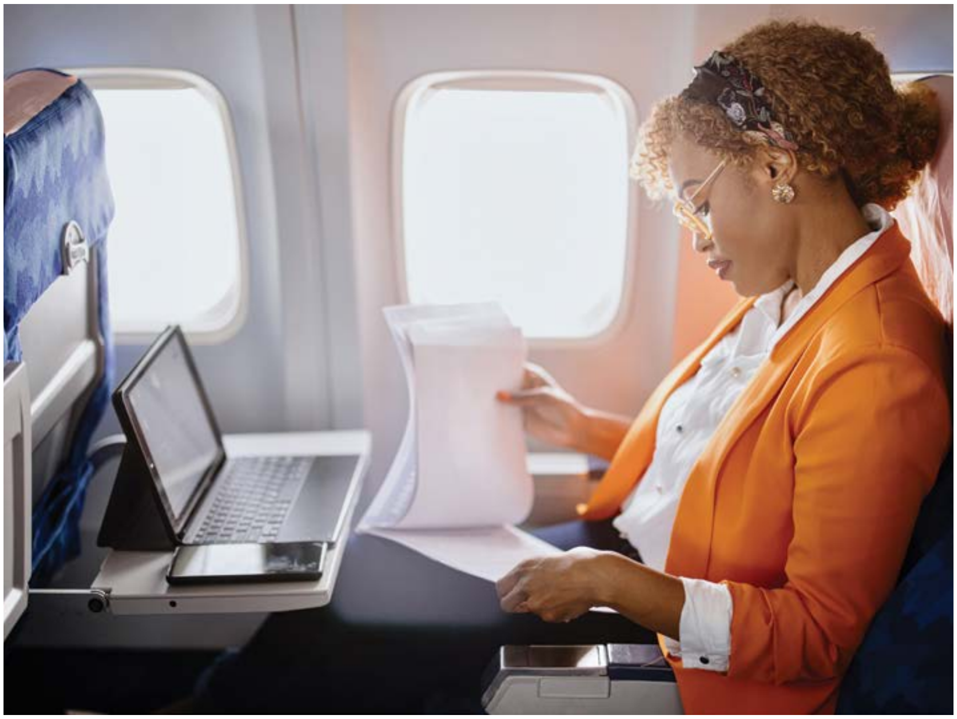

for these services vary for each state and these services may create greater safety or security risks."

Tip: When you read your travel and travel reimbursement policies, does your commitment to safe travel leap off the page? Or is it buried in dense narrative about submitting timely expense reports and getting advance approval before booking trips?

Provide Important Information in an Accessible Format

A common experience for frequent travelers is landing in a distant city and struggling to remember the name and address of your destination. I've taken a few trips where I wound up sitting in the baggage claim area to recharge my phone so I could look up the name and address of my hotel. To avoid that scenario, I write down that important info on a small piece of paper and keep it tucked in a pocket. Working outlets on a plane are nice, but not always available!

A colleague I consulted about this topic told me that at his company they have taken that small piece of paper one step further: they provide a handy, business-sized card to all travelers. The card lists the services and points of contact the traveler might need in an emergency.

The company also requires that travelers post their full itineraries on calendars available to the team.

Tip: Before printing up handy cards for travelers, ask your team what numbers, services, providers, web addresses and other information they would find most valuable on a small, printed card. Set a reminder to review the printed cards at least twice annually to make sure they remain up-to-date. With a plethora of providers offering low-cost printing for business cards, the small expense to create a travel safety card will pay off the first time a traveler relies on the information. And the peace of mind a printed card offers is priceless.

Revisit Dollar Limits and Per Diems

While a growing number of nonprofits simply ask travelers to use discretion and judgment in booking reasonably priced accommodations, others continue to use per diem rates. If you've been part of the wave of people traveling for pleasure and business after three years of staying close to home, you've probably noticed that travel costs are much higher this year. According to NerdWallet, "...the overall cost of travel is up 16% compared with May 2019..." although airfare ticked downward in 2023 after hitting record levels in mid-2022.

One of my colleagues in the insurance industry told me his company has increased per diem amounts for all travel categories across the board, and has set separate per diem rates for each meal of the day and by type of location. The company's policies don't have city-specific rates, but rates are higher for major metropolitan areas. The Federal government's FY 2023 per diem rate for lodging is incredibly low at $98, but 316 non-standard areas in the US have higher per diem rates. And the Federal Travel Regulation allows for actual

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reimbursement when the per diem rate is insufficient.

Another colleague, who leads operations for an international nonprofit, told me her organization has changed its travel policies to permit staff to book refundable fares and provide a per diem of 100% of meals and incidentals expense, instead of the prior practice of providing 50 or 75%. She added that the nonprofit is now more generous in covering airplane seat upgrades, day rooms for long layovers, and contributing to lounge memberships.

Tip: If you have chosen the dollar limit or per diem route, consider whether you're requiring travelers to spend endless hours (time = money) finding safe, suitable accommodations instead of focusing their attention on your mission and their critical work tasks.

Ask, Don't Assume, That Staff Are Available to Travel

One senior nonprofit leader I interviewed for this article told me that "A trend we're seeing is an overall decrease in some employees' desire to travel for work, or for as long or often." If you're a member of the Gen X or Baby Boomer generation, you may recall a time when you were *told*, not *asked*, about an upcoming business trip. And that was long before business travel expectations were added to position descriptions!

Keep in mind that a staff member's availability and interest in travel will likely change during the course of their employment at your nonprofit. Following an intense period of caring for an elderly parent or after the kids have finally left the nest, a team member may be eager to resume travel. Check in with team members regularly to inquire about availability to travel; don't assume the employee's preference last year remains true today.

Tip: If a high-performing employee tells you they are unable to travel outside the area, refrain from questions that simply satisfy your curiosity about why. Accept the employee at their word, encourage them to reach out if that preference changes, and ask if it would be ok to revisit the topic in a year's time.

You Can't Go Back: Recognize the Staying Power of Remote Work

Heather Chadwick shared that Teach For America's business travel practices have changed significantly in recent years, but while business travel has increased some, she doesn't expect it will ever return to pre-pandemic levels. She adds, "We continue to balance budget constraints with org-wide needs and we recognize the impact that in-person work can have so we are trying to be intentional about when in-person work happens."

Tip: Convene your team to talk about remote versus in-person meetings. What circumstances truly warrant the inconvenience and cost associated with business travel? At NRMC we believe site visits for Risk Assessments are very helpful when the mission of the nonprofit includes delivering diverse programs from multiple facilities. If a client's team mostly works remotely, we conduct the entire Risk Assessment without ever getting on an airplane or on the road.

Be Proactive: Just Because It Hasn't Happened Doesn't Mean It Can't or Won't

A senior risk leader from an international nonprofit told me that "From supervision, and housing policies and protocols, to insurance coverage (travel-related, medical, repatriation, etc.), travel crisis communications plans, medical/health considerations/assessment, to general travel safety provisions, we take proactive steps to help ensure the health and safety of everyone who travels under our auspices."

Being proactive and prepared are key to building organizational resilience. No nonprofit mission can afford to be stalled or waylaid because of an incident leaders believed could never happen. Advance preparation to equip travelers with tools and a safety mindset will reduce the likelihood of mishaps, and ensure that travelers know what to do and who to call if something does happen.

If you're relying on providers that offer emergency assistance, seek assurances that those services will be available when you and your travelers need them. One senior nonprofit leader told me her organization has grown concerned about the performance of emergency evacuation providers who may be overtaxed and unable to live up to their promise of immediate and potentially life-saving services.

Tip: Risk readiness requires thinking of disruptive events and circumstances that have never happened. Invite your team to brainstorm potentially disruptive events that could impact staff travel. Ask: what can we do now to ensure resilience should that 'what if' event occur?

It's a New Day: Refresh Your Travel and Transportation Policies

Each of the people I reached out to for this article offered insights into some of the most relevant trends and developments that will guide future decisions about staff travel as well as valuable recommendations to colleagues updating travel policies. These insights and recommendations included:

- "Approach your policies in a way that addresses business needs and realities, yet leaves room to reasonably accommodate, when possible, the increased overall travel health and safety concerns and needs some individuals may have coming out of the pandemic."
- "Communicate, don't assume! If you don't have a travel policy, develop one."
- "The most important thing we did was to emphasize that staff are not required to travel if they are uncomfortable traveling—no questions asked. While we emphasized it initially due to different tolerances/ circumstances with the pandemic, we

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are also referring to it in other contexts, such as in connection with travel to countries with anti-LGBTQ laws."

- "Make sure you're looking at your policies through an equity lens. For example, our organization has added additional benefits for parents with small children."

With respect to policies concerning the transport of clients and participants, remember to:

- Ensure all drivers have been screened and deemed eligible to drive on your behalf.
- Institute checks to verify that vehicles your nonprofit owns are properly maintained and checked to ensure safety features are working as intended; these checks should be more frequent than the safety inspections required by your state.
- Properly train drivers and require them to sign a pledge agreeing to safe driving practices.
- Carefully review telematic devices and other tech tools available from your automobile insurer, and use those that have more advantages than disadvantages for your nonprofit.
- Regularly review accident and incident reports to identify root causes and follow-up items.

In the Disney/Pixar film "Up," the globetrotting, profound Charles F. Muntz says, "Adventure is out there." When I'm asked how I cope with the drudgery of business travel, I sometimes reply: "I love traveling because that's where the people are!" Personally, every flight delay or cancellation, every disappointing hotel stay, and every moment of utter exhaustion has been well worth it. Without traveling to the places where nonprofits serve people and communities, my appreciation for the incredible work and impact of our sector would be a teeny fraction of the vast whole.

An up-to-date travel policy grounded in simple safety messages should be a resource, not a burden, to staff who travel to support your mission. And a practical, clearly-written transportation policy should inspire pride among those who drive on your behalf. You owe it to your mission and your traveling ambassadors and passengers to right-size and streamline these polices without delay. The world around you is waiting: are you ready?

Melanie Lockwood Herman is Executive Director of the Nonprofit Risk Management Center. She has always loved to travel, and is grateful anytime an airline delays takeoff to address maintenance and mechanical issues. Whenever possible, she sits in the window seat of the exit row. She welcomes your questions about any topic in this article or your tips for finding low-cost, last minute trips anywhere, at Melanie@nonprofitrisk.org or 703-777-3504.

SAMPLE: Overview of a Travel and Safety Policy

The contents of a travel and safety policy for your nonprofit should look very different from the policy of an organization with a different mission, structure, and resources. With that in mind, below are some of the sections you may want to include in your travel policy.

Tip: Choose bulleted lists over dense narrative for the most important messages in your travel and safety policy! Use bold and italics sparsely to draw attention to key pieces of information; NEVER USE ALL CAPS IF YOU WANT YOUR POLICY TO BE EASY TO READ.

Overview

The overview section of your policy may include a reminder that "all travel expenses must be reasonable and necessary," remind travelers about the need to seek approval before booking travel, and let them know who to address questions to.

An appropriate overview may highlight a few high-level messages, such as:

- Exercise discretion and good judgment.
- Be cost conscious, while balancing cost effectiveness with environmental awareness (layovers produce as much as 2X the emissions of direct flights).
- Make reservations as far in advance as possible to take advantage of reduced fares.
- Submit required supporting documentation within 30 days of completing your trip.
- Report expenses accurately.
- You may not book more expensive travel to better suit personal travel plans.
- You may earn frequent flier miles and points for approved travel, however, you may not choose a more expensive itinerary for the sole purpose of earning miles or points.

Travel Safe!

The travel safe section of your policy should contain statements relevant to your mission and the types of business travel you expect. Ask experienced staff travelers for their safety tips and include them here.

- Abide by local laws, except where compliance would involve a breach of human rights or dignity. Local laws take precedence over our internal policies and procedures.
- Unless there is a dire emergency, never use a phone while driving; this prohibition includes 'hands-free' conversations.
- Report back to your supervisor about ANY security concerns or incidents that happened while you were traveling. A near miss is an incident, and anything that SEEMS suspicious IS suspicious.
- Learn as much as you can about security in the areas that you are traveling to BEFORE you travel.
- Keep the travel safety card provided by us in your wallet while you are traveling. Keep a photo of the card in your phone in case you lose your wallet.
- Designate a staff member (your supervisor or a colleague who you know will be available) to check in with each day you are on travel.
- Avoid putting yourself in any situations that may increase security risks to you and/or any external partners traveling with you.
- Use common sense and sound judgment. If you sense danger, follow your instincts. If you feel something isn't right, wherever you are, leave! Don't worry about overreacting or seeming foolish. The same good judgment you use at home applies wherever you travel.
- Communicate your concerns, suspicions, and observations to your supervisor and trusted colleagues.
- Be well! Eat well, treat illnesses, and get adequate rest and relaxation. Stress is one of your worst enemies. Becoming sick or exhausted will not help you accomplish your work. Always travel with a container for water and remember to keep hydrated.
- Upon checking into your hotel room, look at the diagram on the back of the door and note the direction of the emergency exit (staircase), and also the distance from your room. If possible, request a room on a lower floor in case you need to exit in an emergency (2nd – 4th floors).
- Never travel in a vehicle whose driver appears to be impaired.
- If you are uncomfortable with the speed of the vehicle in which you are a passenger, politely ask the driver to please slow down.
- There is no such thing as a personal risk. Every risk you take represents a potential risk to the team, our mission, and the people and communities we serve.

Use of Organization Credit Cards + Employee Reimbursements

- Submit usage reports at the end of every month in which expenses were incurred.
- Never use your organization credit card for personal expenses.

Mileage Reimbursement and Rental Cars

- Business travel in a personal vehicle is reimbursable at the current IRS rate for mileage.
- Travel to and from your primary place of work is not reimbursable.
- Renting a car for business purposes is permitted while traveling in the United States; when traveling internationally, hire a known driver or service for local transport.

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