

Travel Expenses for Invitational Travel Authorizations for Spouses

We were recently asked whether certain travel expenses incurred by spouses of military members traveling pursuant to Invitational Travel Authorizations (ITA) are reimbursable. Transportation expenses at issue include checked baggage fees, taxi fares and airport terminal parking fees. These expenses, and others such as lodging and meal & incidental expense per diem, are reimbursable only if specifically authorized by the Authorizing/Approval Official (AO). ITAs should specifically list any and all expenses determined to be reimbursable.

FACTS

There are many instances where spouses may accompany military members on official Government business. For example, a general officer's spouse may accompany the general officer to attend a meeting of, or ceremony involving, foreign military counterparts and their spouses. In such a case, the general officer's spouse has a representational role on behalf of the United States and the Department of Defense. Such spouses may be issued ITA to perform such travel at the Government's expense, pursuant to the Joint Travel Regulation (JTR), section 030501, paragraph A.10.a.1., if the AO determines that the spouse's presence would further the interests of the Department of Defense, United States Air Force or the Command.

Typically, such spouses on ITA travel with the sponsoring military member. In the present case, the sponsoring general officer must miss the first day of a summit meeting for all Air Force senior leaders in her functional community, in order to meet mission requirements. The summit agenda, which focuses on operational issues, has been specifically tailored to accommodate the general's absence on the first day. The approved agenda for the spouse's summit, on the other hand, is focused on issues affecting Air Force families and cannot be tailored to accommodate the affected spouse's absence on the first day. Thus, it is desired that the spouse travel by commercial air ahead of his/her sponsor (who will be traveling by military aircraft), in order to attend the entire spouse summit. At issue, is the payment of terminal parking for a Personally Operated Vehicle (POV) at the departure location, checked baggage fees associated with the commercial air ticket and taxi fare at the arrival location.

LAW

The JTR sets forth numerous requirements for spouses traveling on ITAs. According to JTR section 030501, paragraph A.10.a.1, when the spouse is traveling to fulfill a representational role that is not mission essential, then the spouse's invitational travel must be on a mission noninterference basis and must further the interests of the DoD, the Military Service, or the Command when the spouse travels to:

(a) Attend a function in which the DoD sponsor is participating in an official capacity and in which the spouse is to address those assembled or otherwise play an active role and visible part;

(b) Attend a function—with or without the DoD sponsor—attended by spouses of community leaders, government officials, foreign dignitaries, or foreign military officers with whom the sponsor is meeting in an official capacity;

(c) Attend a function—with or without the DoD sponsor—where a substantial number of those present are military families or where the focus is on matters of particular concern to military families.

For such representational spousal travel, the allowance is for Government-funded transportation only. The travel authorization must include the following statement:

“This travel authorization authorizes the spouse to accompany the sponsor to attend an official function. It does not authorize per diem or other expense allowances for the spouse. If the spouse does not desire to bear the expenses ordinarily reimbursed through per diem or other expense allowances, this travel authorization is canceled.” See JTR section 030501, paragraph B.2.

If, instead, the spouse of a Service member or civilian employee is traveling for unquestionably mission essential reasons and there is a benefit for DoD beyond fulfilling a representational role, then the spouse on invitational travel for this reason are authorized the standard travel and transportation allowances specified in JTR Chapter 2 for DoD civilian employees. See JTR section 030501, paragraph A.10.b.

ANALYSIS

Spouses may only travel on ITAs after an AO determines that such travel furthers the interests of the Department of Defense, United States Air Force or Command. By making such a determination, the AO must decide whether the military interests are served by the spouse traveling to attend a function. The intent of the JTR is to allow such a spouse’s transportation to and from the event to be at the Government’s expense, with the expectation that the spouse and sponsor will share lodging and ground transportation. The JTR’s expectation is that the spouse will normally travel with the sponsor to the site of the events even if their respective agendas there diverge and the spouse attends an official function where the presence of the sponsor is excused by the above-cited provisions.

This travel with the spouse requirement is rooted in minimizing the cost to the Government of the spouse’s travel. By traveling with the sponsor, the spouse will not incur separate parking fees, taxi fare, rental car costs and a host of other expenses. Further, the spouse is not entitled to any portion of per diem while on ITAs, not even meals. Again, the intent of this limitation is to minimize the Government’s costs. The mandatory statement that must be included on ITAs cautions the spouse that he/she will not be afforded per diem allowances and, if that condition is not acceptable, they should not accept the offer of invitational travel.

In the present case, the AO has already decided that the general officer sponsor and the accompanying spouse may travel by separate conveyances for the convenience of the government and at government expense. The issue before us is reimbursement for ground transportation (POV terminal parking fees at the departure location and taxi fare from the commercial airport to the site

of the summit) and excess baggage fees for the spouse who will be traveling on a government-purchased commercial airline ticket. Admittedly, these are miscellaneous expenses the spouse would not have incurred if he or she was traveling by military aircraft with the general officer sponsor spouse.

We find that the terminal parking and the taxi fare are voluntary expenses for which other arrangements could be made by a prudent traveler traveling at their own expense. Invitational spouse travel to a representational event is not meant to reimburse every expense that a spouse may incur. Even if the spouse had flown as originally planned via military aircraft with the general officer, his/her meals at the site of the summit would largely be paid from personal funds.

As to the so-called “excess baggage” fee, this is a graduated fee that the airline charges for the traveler who checks either one, two or three checked bags. Since the impact of the fee is to induce travelers to forego checking luggage that may travel comfortably within the cargo compartment of the aircraft and, instead, attempt to carry all of their possessions with them into the aircraft cabin as “carry-on” baggage, this seems merely an airline subterfuge to charge greater fares while still remaining competitive in the Internet travel market. Some airlines apparently charge such fees and some do not. Those that do charge excess baggage fees presumably have lower base fares; those that do not, presumably have higher base fares. Since it was the Government that chose the traveling spouse’s airline, it would not be fair to pass along a portion of the air fare to the spouse in the form of excess baggage fees. Accordingly, these fees are reimbursable.

CONCLUSION

An accompanying spouse who travels by commercial airline, either with or without their sponsor, may not claim separate ground transportation expenses. The spouse may, however, be reimbursed for checked baggage fees charged by the government-contracted airline.