Travel Policy

Travel conducted on behalf of the Tower Foundation (Foundation) and San José State University (SJSU) must be necessary, ordinary, reasonable, and directly connected to authorized, official university business. The purpose of this policy is to establish clear guidelines, governance structures, and reimbursement procedures that ensure sound financial management, compliance with regulatory standards, and proper stewardship of philanthropic funds. The Foundation will reimburse travelers for actual, allowable, and necessary expenses incurred in the performance of authorized official business, provided the expenses are properly documented, approved, and submitted in accordance with this policy.

Approval for Travel

Pre-authorization for travel is required for all domestic travel and international travel.

Travelers must submit the required travel approvals to the Tower Foundation **prior** to embarking on the trip and prior to making non-cancellable travel arrangements, including conference registration fees.

Please note the following:

- The traveler cannot approve their own travel.
- The approver cannot be the traveler’s subordinate.
- A direct supervisor and an authorized Tower account signer must approve the travel request.

Domestic Travel

EMPLOYEE

Tower and SJSU employees must submit requests for travel approvals using the Request for Travel Approval Form. Travel must be approved by the traveler’s supervisor and Dean or VP. To ensure that all required approvals are obtained in time, it is recommended that requests be submitted at least 14 business days in advance of the intended departure date.

NON-EMPLOYEE & STUDENT

SJSU student travel may include travel for conferences, competitions, workshops, or other official SJSU business-related activities. All student travel requires a completed Request for Travel Approval Form prior to traveling. Travel must be approved by the College or Division lead or liaison and Dean or VP.

The Student Travel Informed Consent form is required **prior** to all student travel and should be submitted to the Tower Foundation with the approved Request for Travel Approval.

International Travel

International travel requires the same approvals as domestic travel, as well as approval from the Office of the President or designee (VPFA & CFO). To ensure that all required approvals are obtained in time, it is recommended that requests be submitted at least 45 days in advance of the intended departure date.

Travel to high-hazard countries requires additional review and may require additional approvals. To determine if a destination has been deemed a high-hazard area, travelers should refer to the US Department of State's current travel warnings on the U.S. Passport and International Travel website.

Team Travel

Team travel involving students (NCAA, field trip, instructor-led) should process all travel-related activity with San José State University using the college or unit stateside budget. Once the travel and all associated financial reconciliations are complete, the college or unit must submit all costs to SJSU Finance to enable reimbursement for the appropriate Tower Foundation account.

Travel Expenses Guidelines

The Tower Foundation will reimburse travelers for actual allowable expenses as outlined below.

Travel Expenses: Travelers must submit original, itemized receipts for actual transportation, lodging, meals, and incidental expenses with the request for reimbursement. A credit charge slip is not acceptable for travel charges.

Conference and workshop attendees are not eligible to receive a reimbursement for any meals included in the registration fee for conferences, workshops, and meetings. Expenses that are not directly related to and required for official Tower Foundation travel (such as personal calls, entertainment, and magazines) are not reimbursable.

Transportation: To be fully reimbursed by the Tower Foundation for transportation expenses, the traveler must use the most economical mode of transportation available. Airfare will only be reimbursed at coach rates or less. Where mileage reimbursement between two points of travel is claimed, when airfare would be most economical (i.e. San Jose to Los Angeles), the traveler will be reimbursed the amount of airfare only. The list below describes rules that apply to allowable transportation expenses:

Airfare: Airfare can only be reimbursed at coach rates or other discounted rates (whichever is most economical). The traveler's expense claim portion of the Travel Expense Claim Form must be accompanied by the flight itinerary when airfare is being claimed. If a credit card was used for payment the receipt must also be submitted.

Automobile Rental: Reimbursement will be made for car rental when an explanation substantiating its necessity for business travel is submitted.

Use of Private Vehicles: Reimbursement for the use of a private automobile will be allowed for the owner of the vehicle only, provided that the travel was necessary for business purposes. Toll fees and reasonable parking fees are also reimbursable. Mileage may be claimed at the current IRS standard mileage rate. Employees and volunteers must possess a valid California driver's license or equivalent to legally operate the class of vehicle(s) they operate in their employment.

Lodging: Reimbursement for lodging expenses is permitted when travel requires an overnight stay away more than 25 miles one way from the traveler's primary residence for official business purposes.

Rates & Economics: Travelers are expected to utilize standard, single-occupancy accommodations at reasonable, standard room rates. Luxury or premium accommodations are not reimbursable. Documentation: Claims for lodging reimbursement must be accompanied by an original, itemized hotel folio showing a zero balance (indicating full payment). Express checkout receipts that do not show an itemized breakdown or proof of payment are not acceptable.

Non-Reimbursable Expenses: Personal incidentals charged to the room (e.g., in-room movies, mini-bar items, spa services, laundry services for stays under five days, or room upgrades) will not be reimbursed and must be settled by the traveler upon checkout.

Shared Accommodations: If a traveler shares a room with a non-business companion (such as a spouse or family member), reimbursement will be limited to the single-occupancy rate for the room. Any additional cost incurred for double or higher occupancy is the responsibility of the traveler.

Meals: Travelers will be reimbursed for the cost of food for breakfast, lunch, dinner, and related tips and taxes.

Travel Expense Documentation Requirements: Original, itemized receipts or invoices for expenses must be submitted with a properly completed Travel Expense Claim Form. Itemized receipts must include dates and should be attached in chronological order. Lodging and car rental expenses should be supported by an itemized receipt. **Please be aware that copies of credit card payments are not considered itemized receipts**.

Philanthropic grants may include variation among the rules for reimbursement of travel expenses such as transportation and lodging. In these instances, the travel rules of the funding entity issuing the grant will take precedence if it varies from Tower Foundation policy.

Travel Expense Reconciliation: Travel expenses incurred by a Foundation or SJSU employee must be itemized on the *Travel Expense Claim Form* and accompanied by required receipts. Forms must be signed by the traveler, the supervisor, and the authorized account signer approving the expenditures against the proper Tower Foundation account.

A completed and approved Travel Expense Claim Form must be sent to the Tower Foundation Accounts Payable Department (TowerAP-Group@sjsu.edu) within 30 working days of the completion of each trip. The Travel Expense Claim Form must contain the following information:

> **Purpose:** The purpose section should show the direct relationship of the travel to an official Tower Foundation or San José State University function, and if applicable, it will include the performance of a contract or grant for which the Tower Foundation has responsibility.
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> **Dates:** All days from the date of departure to the date of return must be included on the claim form. Days for personal use must also be referenced as such.
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> **Expenses:** Costs of transportation, meals, lodging, and miscellaneous expenses must be listed by date and location.
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> **Signatures**: Upon completion of travel, the Travel Expense Claim Form must be signed by the person who incurred expenses and is requesting reimbursement or settling a travel advance. The signature of the authorized account signer is also required.

Intermingling of Business and Personal Travel

Travel expenses not directly related to or required for official Tower Foundation or San José State University travel (non-business or personal) are not paid by the Tower Foundation.

The following rules apply to all non-business or personal travel of an individual, which coincides with Tower Foundation travel:

- If an indirect route is traveled or travel by a direct route is interrupted due to personal travel preferences, reimbursement for airfare will be made at the actual charge that would have been incurred by traveling the direct route.
- The personal portion of all travel costs must be subtracted before expenses are submitted for reimbursement.

In general, the expenses of an employee’s spouse and family accompanying the employee on a business trip are not reimbursable. The IRS has ruled that attending meetings or conferences in which the spouse has no significant role or performs only incidental duties of a clerical, secretarial, or medical nature does not constitute a business purpose.