01. POLICY STATEMENT

The purpose of this PPS is to provide travel guidelines for University Advancement personnel. This policy will apply to all University Advancement employees regardless of the source of funds used to pay travel costs.

02. TRAVEL - LODGING

University Advancement travelers may be reimbursed for lodging expenses incurred on a day that they conduct university business at a destination 100 miles one way or more outside of their designated headquarters and have an overnight stay. Travelers in Texas should use the state rate for lodging if it is accepted or choose reasonably priced lodging if no hotels honoring the state rate are available.

A. Criteria for lodging:
   1. Must be a commercial lodging establishment.
   2. Reimbursement is only for the traveler’s own actual lodging expense.
   3. Reimbursement requires an acceptable, original receipt with the name of the commercial lodging establishment, the name of the traveler, the single room rate, and daily and itemized charges. Receipt must show a $0.00 balance.
   4. Maximum rates are based on the location of the lodging establishment.

B. Maximum Lodging Reimbursement Rates

Travelers will be reimbursed for actual hotel expenses not to exceed U.S. General Services Administration (GSA) rates for in-state and out-of-state travel. Foreign travel will be reimbursed for actual lodging expenses not to exceed the U.S. Department of State (DO) rates.

C. Hotel Occupancy Taxes

Travelers are exempt from State of Texas Hotel Occupancy Taxes when traveling on official state business and must present the applicable tax exemption form to the lodging establishment at check-in. Texas Hotel Occupancy Taxes inadvertently paid by the travelers are not reimbursable. Form may be found at: http://www.cpa.state.tx.us/taxinfo/taxforms/12-302.pdf.

All other required taxes (county, city, municipal, out-of-state) or fees are reimbursable. Allowable hotel taxes and required fees are reimbursable proportionate to the lodging reimbursable room rate.
03. TRAVEL - MEALS

03.01 Meal and Incidental Expense Per Diem (Overnight Allowance)

University Advancement travelers may receive meal and incidental expense (M&IE) per diem on overnight trips for the days that the traveler conducts university business outside of his or her designated headquarters. M&IE per diems are intended to supplement, not fully compensate, the meal costs and personal incidental expenses incurred while traveling on official university business.

03.02 Criteria for Meal and Incidental Expense Per Diem

A. University Advancement travelers must travel a minimum of 100 miles one way and have an overnight stay.

B. Receipts are required for University Advancement travelers (food, fuel, hotel, tolls, parking, etc.).

03.03 Maximum Per Diem Rates

For FY10, University Advancement travelers may receive M&IE per diem not to exceed $46.00 for a full day of in-state travel and the U.S. General Services Administration (GSA) rates for out-of-state travel. A partial day of in-state travel will be paid at the rate of $23.00.

Out-of-state M&IE per diem is paid at the U.S. General Services Administration (GSA) rates for out-of-state travel. The rates will vary by county and state. The first and last day may be paid at 75% of the rate depending on time of travel.

All University Advancement travelers attending conferences with meals provided (breakfast, continental breakfast, lunch or dinner) will have their daily per diem adjusted accordingly.

For foreign travel, travelers may receive M&IE per diem not to exceed the U.S. Department of State (DOS) rates.

03.04 Personal Incidental Expenses Per Diem

Business expenses such as parking, tolls and fuel are reimbursable in addition to the M&IE per diem. Receipts are required.

03.05 Non-Overnight Meal Allowance

For Non-Overnight Travel, University Advancement will reimburse travelers for business meal costs only. Itemized receipts are required. Eligibility for a
business meal reimbursement must include a list of non-university guests and a description of the business purpose.

04. TRAVEL - MILEAGE

Travel by Major Gifts Officers and Development Officers will be by rental car when the distance of travel per day exceeds 100 miles. Travel by personal owned vehicle is permitted if it is in the best interest of the university.

The Official State of Texas Mileage Guide is the legislative approved form of documenting miles between two city points. Payment of point to point mileage is acceptable when departure and destination points are not listed in the Mileage Guide.

04.01 Criteria for Mileage

A. The mileage rate for travel in a personal owned vehicle covers depreciation, maintenance, repairs, gasoline, oil, insurance and vehicle registration fees. These are not additional reimbursable items.

B. Mileage between an employee’s residence and place of employment will not be reimbursed.

C. Parking and toll costs will be reimbursed when properly documented on the travel voucher form. Receipts are required.

05. TRAVEL - RENTAL CARS

The State contract rental car vendor is Enterprise.

05.01 Method of payment
The method of payment for rental cards is direct billing/purchase order. Enterprise requires a Texas State purchase order to invoice Texas State directly.

05.02. Insurance

When renting a vehicle from Enterprise under the State of Texas contract, the rental rate includes two kinds of insurance:

- Loss/Damage Waiver or comprehensive, which covers all damage to the rental vehicle if it was rented under the state contract; and

- Liability, which covers persons and property outside the rental vehicle. The amount of this extended liability insurance is $100,000 bodily injury per person, $300,000 bodily injury per occurrence; and $50,000 property damage per occurrence, for a total of $350,000 per accident.
Proof of insurance is located in the glove compartment or on the windshield of all contract rental cars. In the event you need to provide proof of insurance, show the above “proof of insurance” document.

Liability insurance supplement, personal accident insurance, safe trip insurance, or personal effects insurance are not reimbursable.

05.03 Fuel

Fuel charges added to the rental invoice for re-fueling by Enterprise will be reimbursed to Texas State by the traveler.

Fuel expenses incurred by a traveler driving a rental car for personal use after a business trip will not be reimbursed. See example below:

Traveler returns from a business trip and has ample time to return the rental vehicle but decides to keep the car due to the “24-Hour” rental agreement (out at 9, in by 9). Fuel charges incurred during this time will not be reimbursed.

06. TRAVEL - MISCELLANEOUS PROCEDURES

Department Administrative Assistants will make lodging reservations for all University Advancement personnel to ensure the correct rates are obtained.

Reservations for rental cars for Major Gifts Officers and Development Officers must be submitted to the Department Administrative Assistant.

Questions concerning rental cars may be directed to the VPUA Administrative Team.

UA travelers will place all business travel related appointments on their electronic office calendar. This information must include:

- Time of departure
- Time of arrival
- Location
- Reason for travel (conference, prospect visit, etc.)
- Prospect name if applicable
- Telephone contact number

This information is necessary for the Administrative Assistant to track travel and complete a travel reimbursement voucher.

07. REVIEWERS OF THIS PPS

Reviewers of the PPS include the following:
Executive Assistant, University Advancement – Senior Reviewer  
Vice President for University Advancement

08. CERTIFICATION STATEMENT

This PPS has been approved by the following individuals in their official capacities, and represents University Advancement Division policy and procedure from the date of this document until superseded.

Executive Assistant, University Advancement  
Vice President for University Advancement