

GEORGE FOX UNIVERSITY TRAVEL POLICY

University business travel is suspended due to COVID-19 as documented in the GFU Purchasing Policy effective May 12, 2020.

Questions should be addressed to your area VP.

PURPOSE

This policy is intended to facilitate standard travel practices and to assist faculty and staff in planning and documenting their expenses while traveling on University business. It is also intended to ensure compliance with Federal tax rules. It is not intended to set forth policy on every allowable expense and assumes that department heads are responsible for communicating the University Travel Policy to faculty and staff. You can refer to this policy on the Finance website: georgefox.edu/offices/fin_affairs/index.html

The University's policy is to reimburse fairly and equitably employees and non-employees for necessary and reasonable travel expenses incurred on University business. Employees traveling on business are responsible for complying with University Travel Policy and should exercise the same care in incurring expenses as they would in personal travel, regardless of the source of funds.

TRAVEL AUTHORIZATION

All travel must be approved by a Department Head, Dean, Vice President or Provost, prior to the making of reservations or otherwise committing University funds. Travel expenses, which are not pre-approved, may not be reimbursed.

TRAVEL RESERVATIONS-STAFF AND FACULTY

Air Travel:

Airlines tickets for University related travel can be purchased through the George Fox University Egencia Corporate Travel website egencia.com (referred from here on as the ECT website). You will be asked to select your cost center and payment information prior to booking your flight. Use of a GFU Visa card for payment should be used when possible. All other air travel for business purposes will automatically be billed to the University so it is important to select the correct cost center. **This is the preferred method for booking travel at George Fox.**

Tickets purchased at least 21 days in advance usually have the lowest fares. Airline fares vary substantially depending on factors such as route, day of week, time of day, length of stay, advance reservations requirements and airline competition. When a more favorable price can be obtained for airfare by adding additional days to the trip, e.g. staying over a Saturday night or flying on a particular day, reasonable expenses for lodging and meals for the minimum necessary

additional days may be claimed if the total cost of the reduced fare plus the additional day's expenses are less than the lowest available airfare would have been with out the additional days of travel.

Spouse/Friend Travel

Spouses, family members, or friends may accompany George Fox faculty or staff members on business trips. However, any additional costs incurred because of these additional travelers are non-reimbursable out-of-pocket expenses. Any additional cost for the personal travel should be reimbursed to the University directly.

Candidate or Guest Speaker Travel:

The search committee chair or department head is responsible for initiating the travel arrangements for the candidate through the University ECT Corporate website. People inviting special guest speakers or lecturers, are also responsible to initiate the travel arrangements.

In both cases, please contact Finance - Purchasing so we can direct you how to arrange this travel. The University will be billed directly for the flight so there is no need to reimburse the individual. Local accommodations for guests can also be booked through Egencia.

Group Travel : Off-Campus Studies, Juniors Abroad and Athletic Groups etc.

Contact the Center for Study Abroad for all international travel. For all other group travel contact the group travel desk at ECT (preferred method) or the Travel Agency you work with as soon as you are aware of your travel dates, so that they can explore group discount opportunities and facilitate your travel arrangements. When payment is required for a deposit or final payment, please allow enough time to have a check processed in accounts payable. If this is not possible, please call Finance – Purchasing. **Group ticket charges should not be placed on personal credit cards.**

Airport Parking

Travelers should use the most economical parking facilities available, such as the airport economy lot.

Lodging

To maximize savings opportunities lodging reservations can be made through the ECT website. A single room with a private bath in a suitable, **moderately priced** hotel is the University standard – balancing quality, price and security. Examples of moderately priced hotels the University recommends are: Holiday Inn, Comfort Inn and Best Western.

Conference

When special rates for air and lodging are provided for a conference, it is recommended that you check the ECT Corp website to verify that the conference pricing is the best option available. Should it not be, book your lodging through the ECT website. Should the conference pricing be the best option, you will be advised to make the arrangements as noted on your conference registration form.

Car Rental

First determine whether it is more economical to rent a car or use your personal vehicle. This can be done using the mileage calculator on the Financial Affairs webpage.

georgefox.edu/offices/fin_affairs/tripcalc.html The University will reimburse at the lower of the two amounts. It is also important to determine if it is less expensive to fly to your destination or to drive. **If it is less expensive to fly and you choose to drive, the University will reimburse you for the lesser of the two amounts.**

Car rentals can be booked for both local and national travel with Enterprise/National Car Rental by using the ECT website. You will be asked to select your cost center for billing purposes when reserving your car. All completed car rentals reserved for business purposes will automatically be billed to your GFU Visa or directly to the University so it is important to select the correct cost center.

If you are under 25 years of age when requesting car rental reservations advise the agent.

The University standard for a car rental is a compact or intermediate car. When traveling in a group, a larger car or a 12 passenger van may be rented.

For further savings travelers should:

When traveling for University business, decline the CDW (extra insurance). The University's insurance covers car rentals within the U.S.

Fill gas tank before returning car.

It may be necessary to purchase additional auto insurance if renting an auto in a foreign country.

In the event of an accident a copy of the accident report should be submitted to the Finance office. Any deductible will be charged to the department.

The University does not pay for parking tickets or traffic tickets.

Meals:

Reasonable expenses for meals will be reimbursed in full when detailed receipts are submitted. Anything in excess of a reasonable amount may require additional justification and may not be reimbursed.

IRS regulations require that an employee must be away from home substantially longer than an ordinary day's work, before their meal cost is reimbursable. Therefore, for same day trips, University travelers will not qualify for personal meal reimbursements unless the meal would qualify as entertainment.

Entertainment

Business related expenses incurred by a College employee for the benefit of a non-College person (e.g., potential donor, Board of Trustee member, guest) are classified as entertainment expenses, and are reimbursable. In the case of entertainment expenses, date, time, place, business purpose,

name and relationship of persons entertained is required to satisfy IRS documentation standards, thus potentially avoiding being taxed.

Other Travel Related Expenses

Laundry and Dry Cleaning Service - The cost of laundry and dry cleaning, and pressing services utilized away from home **is reimbursable when the business trip exceeds five days.**

Gratuities/miscellaneous reimbursable and non-reimbursable expenses - Gratuities are allowed for normal tipping situations. Use the following as guidelines for tipping: 15% for meals, \$1/bag for bellmen/skycaps and 10% for taxi. In-room movies, theater, and other forms of personal entertainment expenses are not reimbursed. Health club charges are also not reimbursed.

Travel Reimbursement

Travelers (.5 FTE and above) must complete an Expense Report in Concur: georgefox.edu/offices/fin_affairs/concur.html.

All other travelers must complete a Expense Reimbursement Request (ERR) form: georgefox.edu/offices/fin_affairs/FORMS.html

All required receipts must be submitted (Concur) or attached to the ERR (follow Expense Reimbursement Request Procedure tab). Further, both the traveler and his/her department approver must sign the report. This report must be submitted to the Finance office within thirty working days after completion of the trip.

Required receipts must be originals or customer copies identified by the name/address of the business, dated, itemized and properly signed or stamped to indicate that payment has been made. Credit card receipts must be submitted with an itemized statement for transportation tickets, meals, lodging and car rental. Where expenses are shared with external organizations a duplicated copy of the receipts will suffice when submitted with either a copy of the expense report submitted to the other organization or a common expense report showing all expenses charged to both GFU and the other organizations.

Travel Advances

Travel advances are available to defray direct expenditures incurred by University employees traveling on University business. The amount of the advance will vary depending on the length and geographic location of the trip.

In order to obtain a travel advance, fill out a "Check Request" georgefox.edu/offices/fin_affairs/ckreq.xls, in the amount of the advance and obtain proper authorization. Forward the request to the Finance office.

Travel advances and related expenses must be accounted for on an "Employee Expense Report" form **within thirty days from the date of return.** Travel advances must be recorded as a credit in the less advances line. Advances in excess of actual expenditures must be returned to the Financial Affairs. When there is an amount due to the University, include a check with your form. In cases where the University owes you a check, the check will be sent once accounting has reviewed the expense form.

Any prior outstanding travel advances must be accounted for before another advance will be issued. IRS policy states that any advances that are not accounted for in a timely manner, are subject to payroll taxes as taxable income to you.

Other Travel Policies

Assistance during travel

When change in travel plans occurs enroute, the traveler should contact the airline directly, or ECT travel desk, and make the appropriate contacts regarding lodging or airline adjustments.

Personal Vehicles

When use of your own vehicle for University business you will be reimbursed at the current IRS mileage rate. Prior to your travel, please check the trip calculator on the University website to consider the lowest options for travel georgefox.edu/offices/fin_affairs/tripcalc.html

Most itemized expenses related to the operation of a vehicle are not reimbursed, including traffic tickets or parking violations. However, parking, toll fees, etc. are reimbursable. Requests for reimbursement must include a mileage log containing the date, destination, purpose and miles traveled as well as any parking or toll-fee receipts.

The commute from an employee's home to his or her primary place of employment is not considered business travel. If an employee is required to travel from one campus to another for business purposes, **the mileage between the two campuses is a reimbursable expense to the extent extra miles were traveled beyond the employee's normal commute.**

*****Certification is required prior to *any* travel for university business purposes. If you are planning on driving your personal vehicle or renting a vehicle for university business, you will need to complete the Personal Vehicle Certification process at least five business days prior to your trip. If you are planning on driving a university vehicle, you will need to complete the University Vehicle Certification process at least five business days prior to your trip.*****

georgefox.edu/offices/student-life/transportation-policy/index.html

georgefox.edu/offices/plant_services/safety/vehicle_quiz.html

*****The University's insurance policy does not cover damage to personally owned vehicles. Each person using a personal vehicle for University business is responsible for having adequate insurance coverage and for paying his or her deductible should a collision or other incident occur.*****

General guidelines

These policies and guidelines are applicable to the business-related travel of all George Fox's faculty, staff and for all others traveling on behalf of or as a guest of George Fox University. While the information included in the guidelines should be sufficient to cover the vast majority of travel scenarios, it is inevitable that certain instances and issues are not addressed in this document. If you encounter an instance where such is the case, please contact Financial Affairs.

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