
TRAVEL POLICY

CATEGORY:	Procurement and Accounts Payable	POLICY #:	TBD
IMPLEMENTATION DATE:	December 1, 2022	UPDATE DATE:	June 6, 2025

PURPOSE

This policy establishes travel guidelines and responsibilities for all CSU employees, students, and others traveling on official University business, where Cal State Fullerton Philanthropic Foundation (CSFPF) funds are used. This policy is in accordance with the Internal Revenue Service (IRS) regulations, Integrated CSU Administrative Manual (ICSUAM) Section 3601, and [California State University, Fullerton \(CSUF\) Travel Policies and Procedures](#).

SCOPE

CSFPF follows all terms set forth by CSUF's Travel Policies, which apply to all CSUF employees, students, and official University guests. Travel-related expenses are expected to be ordinary, reasonable, and necessary to conduct official University business. This policy ensures travel activities are appropriate, properly authorized, supported by a documented business purpose, substantiated by applicable documents, and comply with all applicable regulations. CSFPF assumes no financial responsibility for expenditures incurred by individuals who fail to follow this policy.

POLICY

1. Accountability

- a. CSFPP follows all provisions set forth by CSUF's Travel Policies, including but not limited to:
 - Employee Domestic Travel, Blanket Travel
 - Authorization to Use Privately Owned Vehicles on State Business
 - Job Related and Non-Job-Related Student Travel
 - Travel Policy for Non-Employees
 - On-Campus Candidate Interview Expenses
 - Moving and Relocation Expenses
 - Foreign Travel
 - CSU Travel Ban
- b. It is the responsibility of the individual traveling on official university business, the administrator, and the authorized approving official to be aware of and follow CSFPP and CSUF Travel Policies in effect at the time of travel.
- c. Individuals traveling on university business are expected to take all steps to minimize risk to themselves and the University. This includes utilizing safe transportation, lodging options, and obtaining appropriate insurance coverage required by CSUF's Office of University Risk Management.
- d. Travelers are expected to utilize CSU/CSUF preferred vendors and CSU/CSUF negotiated terms and conditions whenever possible. The use of additional waivers and discounts available to governmental employees is strongly encouraged.
- e. Travel expenses not directly related to official University business are not reimbursable.
- f. Failure to abide by the travel policies could result in the traveler being personally liable.

2. Travel Request

- a. CSUF's travel policies and procedures must be followed when preparing and submitting a CSFPF Travel Request.
- b. Travelers currently employed by CSU Fullerton (faculty, staff, student employee/job related), student employee (non-job-related), or students traveling on University business must submit an approved Travel Request (Foundation-funded or zero-dollar request) and any necessary supporting documentation to Foundation Accounting Services, before the travel date and before making non-cancellable travel arrangements.²
- c. Foundation Accounting Services will issue a Travel Request Number (TR#) once the Travel Request has been reviewed and approved. Allowable expenses are not to be charged to a Foundation Card until Foundation Accounting Services has assigned a Travel Request Number.
- d. Travel Requests submitted after the travel date will not be accepted and CSFPF assumes no financial responsibility for unauthorized expenditures incurred by the traveler (see Exception section for additional details.)
- e. Travelers using multiple funding sources should always identify the Foundation as the second or supplemental funding source. Travelers must submit their Travel Request documentation to CSUF Travel Operations or its Auxiliaries (ASC or ASI) for processing, which will then

3. Travel Expenses

- a. As stated in the CSUF's Travel Policies, expenses must be ordinary, reasonable, and necessary to accomplish the official business purpose of the trip. Please refer to CSUF's Travel Policies for additional Travel Expense details and restrictions.
- b. University business travelers are expected to be diligent about the cost-effectiveness of travel-related expenditures. When available, travelers must purchase travel services from campus, CSU, or the State of California's contracted suppliers.
- c. Under no circumstances shall expenses for personal travel be charged to or be temporarily funded by the Foundation.
- d. Meals & Incidental Expenses (M&IE)

The reimbursement of daily Meals & Incidental Expenses (M&IE) for travel is a per diem allowance as set forth in [CSUF Travel Policies and Procedure Appendix X: M&IE Reimbursement Limits](#).

- Meals and Incidentals for travel of less than 24 hours are not reimbursable, unless the traveler is away from home overnight as supported by a lodging receipt. Reimbursement shall be authorized for 75% of the total per diem rate for M&IE. ²
- If the trip includes meals that are furnished as part of the registration fee for a conference, convention, symposium, training, workshop, business meeting, etc., the provided meals must be deducted from the M&IE per diem rate. ²
- In the event the traveler must forego the provided meal for health or business reasons, an explanation for the purchase of the meal replacement must accompany the Travel Expense Claim. Supporting documentation may be required and payment will be at the applicable per diem amount. ²
- Meal tips are included as part of the location-based federal per diem rate for meals & incidentals. ²
- Travelers **MAY NOT** charge their meals to a Foundation Card. Meals purchased with a Foundation Card by mistake must be reimbursed to CSFPF immediately upon the traveler's return.
- Expenses for meals incurred by employees who provided hospitality while on travel status are reimbursable in accordance with the CSUF Hospitality Policy. ²

e. Miscellaneous Business Expenses

- Personal telephone calls or fax/computer use charges are not reimbursable and may not be charged to a Foundation Card.
- Inflight Wi-Fi access is typically reserved for the President and their cabinet. Internet fees aboard an aircraft will not be reimbursed unless the necessity is justifiable.

4. Travel Expense Claim

- a. Please refer to CSUF's travel policies for additional information, documentation required, and the CSFPF instructional procedures to complete the Travel Claim process.
- b. A Travel Expense Claim with or without personal reimbursement must be submitted to CSFPF Accounting Services within 60 days of the traveler's return date.
- c. In the event an employee receives reimbursement for travel-related expenses and subsequently gets a full or partial refund related to those expenses in error, the refunded amount must be returned to the Foundation within 30 days of receipt².
- d. CSFPF will automatically hold all personal reimbursement(s) until all outstanding financial obligations (i.e., Past due Foundation Card Reconciliations, past due Travel Claims, etc.) are completed to CSFPF standards⁴.
- e. Documentation Requirements
 - Travel Expense Claim Form – is to be completed in its entirety with expenses itemized in chronological order by date and time.
 - Travel Authorization – request or email copy should be attached to the Travel Expense Claim packet.
 - Receipts – are needed for every expense. Receipts must show vendor, location, date, itemization, and proof of payment.
 - Documentation – might include but is not limited to agendas or programs, mileage/mapping details, cost demonstrations/justifications, sabbatical documentation, currency conversions, Hospitality (D11) form, reimbursement documentation, etc.

5. Blanket Travel Request

- a. CSUF's Blanket Travel Policy and Procedure requirements and restrictions must be followed when preparing and submitting a Foundation Blanket Travel Request.
- b. Blanket Travel Request is for travel within California, travel dates within a fiscal year, and **only used for mileage and reasonable parking costs**.
- c. Travelers currently employed by CSU Fullerton (faculty, staff, student employee/job related), student employee (non-job-related), or students traveling on University business must submit an approved Blanket Travel Request (Foundation-funded or zero-dollar request) and any necessary supporting documentation to Foundation Accounting Services, prior to the initial travel date.
- d. Foundation Accounting Services will issue a Travel Request Number (TR#) once the Foundation has reviewed and approved the Blanket Travel Request. Allowable expenses are not to be charged to a Foundation Card until Foundation Accounting Services has assigned a Travel Request Number.
- e. Allowable expenses must be dated after the TR# issuance date. Blanket travel expenses dated before Foundation Accounting Services approved a TR# will not be accepted, as such expenses will be considered unauthorized purchases (see Exception section for additional details.)

6. Blanket Travel Expense

- a. As stated in the CSUF's Blanket Travel Policies, expenses covered are mileage and reasonable parking costs. Please refer to CSUF's Blanket Travel Policies for additional details and restrictions.
- b. Direct trips between the employee's residence and their designated work location (where most of their work time is spent) are considered commuting miles and are not reimbursable³.
- c. University business travel to a workshop, conference, training, assignment location, etc. (excluding commuting miles) that occurs on a regularly scheduled work day, mileage will be calculated based on the following:
 - When departing from the traveler's usual work location, mileage may be claimed from work location to destination

- When departing from the traveler's residence, mileage may be claimed from the lesser of the two locations (from traveler's work location to destination **or** from traveler's residence to destination)
 - Mileage may be claimed from destination to next destination
 - When returning to the traveler's usual work location, mileage may be claimed from destination to work location
 - When returning to the traveler's residence, mileage may be claimed from the lesser of the two locations (from destination to traveler's work location or from destination to traveler's residence)
- d. University business travel to a workshop, conference, training, assignment location, etc. (excluding commuting miles) occurs on a regularly scheduled day off, mileage will be calculated based on the following:
- From the traveler's residence to destination
 - From destination to the traveler's residence
- e. Expenses for reasonable parking may be charged to the Foundation Card or paid by a personal credit card or cash. An itemized receipt for the Foundation Card Reconciliation or a personal reimbursement will be required.

7. Blanket Travel Expense Claim

- a. Please refer to CSUF's Blanket Travel Policies for additional information and documentation required, as well as the CSFPF instructional procedures to complete the Travel Expense Claim process.
- b. A monthly Travel Expense Claim must be submitted for only travel dates for that month to CSFPF Accounting Services within 60 days from the last day of the month. Travel Expense Claims submitted after 60 days will not be reimbursed (see Exception section for additional details.)
- c. To avoid duplicate payments, travel dates must be entered on the appropriate monthly Travel Expense Claim and not combined with another month's Travel Expense Claim.
- d. In the event an employee receives reimbursement for blanket travel-related expenses and subsequently gets a full or partial refund related to

those expenses, the refunded amount must be returned to the Foundation within 30 days of receipt².

- e. CSFPF will automatically hold all personal reimbursement until all outstanding financial obligations (i.e., Past due Foundation Card Reconciliations, past due Travel Claims, etc.) are completed to CSFPF standards⁴.
- f. Documentation Requirements
 - Travel Expense Claim Form – is to be completed in its entirety with expenses itemized in chronological order by date and time.
 - Travel Authorization – request or email copy should be attached to the Travel Expense Claim packet.
 - Monthly Mileage Details Form – provide required details, include detailed business purpose, and attach documentation to support mileage claims.
 - Receipts – are needed for every expense. Receipts must show vendor, location, date, itemization, and proof of payment.

8. Student Travel Requirements

- a. For a complete outline of job related or non-employed/non-job-related student travel requirements, please reference CSUF's Student Travel Policies and Procedures and CSFPF relevant policies and procedures.
- b. For a CSUF Student or Student Employee (non-job-related) traveling on university business, the following forms must be attached to all Travel Requests:
 - Release of Liability, Promise Not to Sue, Assumption of Risk, and Agreement to Pay Claims Form
 - Student Conduct Agreement Travel Related Event or Activity Form

9. Non-Employee Travel Requirements

- a. For a complete outline of non-employee travel requirements and reimbursable expenses, please reference [CSUF's Travel Policy for Non-Employees](#) and CSFPF's relevant policies and procedures.

- b. Non-Employee Travel for accreditation, consultants, honorariums, independent contractors, and university guests.
- c. Non-Employee Travel subjected to CSUF's Travel Policy and CSFPF's relevant policies and procedures is required to complete the form [Non-Employee Travel Expenses Invoice](#) to reimburse accreditation, consultants, honorariums, independent contractors, and university guests.
- d. Independent Contractors and Consultants – Reasonable travel expenses incurred by University-retained independent contractors or consultants are reimbursable in accordance with these procedures. Such reimbursements are not taxable, provided the amounts claimed are properly substantiated. Unsubstantiated amounts must be reported as income to the contractor on the appropriate IRS instrument (e.g., Form 1099, Form 1042-S, etc.)⁶.
 - The purchase order number (PO#) associated with the Contractor/Consultant must be referenced on the invoice for payment.
- e. University Guests (includes Campus Candidates, Non-Contracted Accreditation, and Honorariums) – Reasonable travel expenses incurred by official University guests, such as in the case of honorariums paid to non-employees and/or non-consultants (i.e., campus candidates, accreditation, guest lecturer/guest speaker).
 - Campus Candidates' travel expenses will require authorization of the [On-Campus Interview Expense Form](#).
 - Honorariums for \$5,000 and over require a purchase order⁶.

10. Driving Requirements

- a. CSUF's Blanket Travel Policy and Procedure requirements and restrictions must be followed when driving on University Business.
- b. [Authorization to obtain driving records from the Department of Motor Vehicles \(INF 254 – Request for Driver's License Information\)](#) must be completed and the original submitted to the University Police Department (UPD)³.
- c. [Authorization to Use Privately Owned Vehicles on University Business](#)

[\(STD 261\)](#) is only required if driving a private vehicle on University business. The original STD 261 form is retained with the department supervisor and must be renewed every fiscal year (July 1st to June 30th)³.

- d. The University's online Defensive Driver Training must be completed once every four years³.

11. Approving Authority

- a. The authority designated to approve travel claims ensures all expenses are reasonable in terms of price, purpose, and necessity.
- b. The approving authority is responsible for:
 - Ensuring expenses are charged to funds authorized for the purpose and are supported by sufficient funds
 - Ensuring expenses requested are ordinary, reasonable, necessary, and supported by a business purpose or justification, as appropriate
 - Validating, to the extent possible, that the traveler incurred the expenses listed and that appropriate supporting documentation is attached
 - Reviewing and approving the business purpose and ensuring the request complies with any applicable sponsored project/grant requirements
 - Approving/denying payment of the Concur Expense Report or Travel Expense Claim on time
 - Denying expenses not directly related to official University business
- c. Complete the Travel Expense Claim (If more than one page, each page of the Travel Expense Claim must be signed by the claimant and the approver).

12. Exceptions

- a. For additional details regarding exception, please reference CSUF's

Travel Policies and CSFPF's relevant policies and procedures.

- b. Exceptions for expenditures that are typically non-reimbursable, and arise because of particular or unusual circumstances, must be authorized or approved and documented by the appropriate approving authority.
- c. Exceptions to this policy must be in writing, documented, and approved by the Dean or Vice President, and must be attached to Travel Request and Travel Expense Claims.

Policy References:

[¹Integrated CSU Administrative Manual for CSU Travel and Business Expense Reimbursements Policy](#)

[²CSUF Travel Policy](#)

[³Blanket Travel Policy](#)

[⁴Student Travel Policy and Procedures](#)

[⁵Travel Policy for Non-Employees](#)


[⁶Foundation Card Program Policy](#)

[⁷Travel Operations Frequently Asked Questions](#)

MEMORANDUM

DATE: January 19, 2026

TO: Laleh Graylee
Vice President for Administration & Finance/CFO

FROM: Ronald S. Rochon, Ph.D. 
President

SUBJECT: Delegation of Authority for Travel Policy Exceptions

In accordance with the ICSUAM 3601.01, Travel Policy, I hereby designate the Authorized Designee(s) identified on the enclosed matrix with the authorization to approve exceptions to the Travel policy, as described herein. As required, all exceptions must be in writing and fully documented evidencing expenses requested are ordinary, reasonable, not extravagant, necessary, and supported by a business purpose or justification, as appropriate.

Travel Policy Requirement	Exception	Authorized Designee
Actual lodging cost not to exceed \$333 per night	Approval of lodging in excess of \$333 per night	Deans or Vice Presidents
International Travel	All Foreign destinations (including US Possessions) except those countries listed below	Vice Presidents
	(1) U.S. State Department Travel Warning list and/or the (2) CSURMA High Hazard Country list	Presidential approval required or VPHR on occasions wherein the President is not on campus and is unavailable for signature
Travel request or expense report greater than \$4,000	Trip amount in excess of \$4,000	President
Other requirements (examples): <ul style="list-style-type: none"> Travelers may secure lodging when traveling on business more than 25 miles (one way) from their normal 	Other exceptions (examples): <ul style="list-style-type: none"> Traveler secures lodging when traveling on business less than 25 miles (one way) from their normal 	Deans or Vice Presidents

Travel Policy Requirement	Exception	Authorized Designee
<p>work location or home, whichever is closer</p> <ul style="list-style-type: none"> • Travelers to claim meal and incidental per diem by location • Spouse or partner accompany traveler for business purpose • Exception for use of transportation in lieu of most common route, most economical mode 	<p>work location or home, whichever is closer</p> <ul style="list-style-type: none"> • Reimburse in excess of the maximum travel meal and incidental per diem rates by location • Partner or spouse travel expenses with business justification provided. State funds not allowed. • Exception for alternative mode or route must be justified in writing. 	