

2014 Travel & Business-Related Expense Policy: Volunteers

I. POLICY STATEMENT

This policy document sets forth the standards and procedures used to identify and reimburse legitimate travel and business-related expenses incurred while conducting necessary, authorized business of the State Bar.

II. SCOPE

Except as noted otherwise, this policy is designed to cover all non-employees including, but not limited to: volunteers, committee members, speakers and invited guests who seek reimbursement for out-of-pocket expenses incurred while conducting State Bar business. Out-of-pocket expenses include transportation, lodging, meal and incidental costs that are necessary, authorized and reasonable, incurred while conducting State Bar business. Authorization from the Executive Director/CEO is required to make any exceptions to this policy; and such exceptions should, whenever feasible, be obtained in advance of incurring any pertinent expense. Any incurred expense not specifically referenced in this policy will need to be reviewed by senior management on a case-by-case basis for approval.

III. GENERAL GUIDELINES

- A. As a general rule, travelers are urged to travel economically. However, in the application of this general rule, extenuating circumstances such as the best economic use of the traveler's time may be taken into consideration in selecting transport, accommodation and other travel means. Written explanations of extenuated circumstances must be approved by senior management and accompany *Expense Reports* submitted to Finance.
- B. Each traveler is responsible for his/her own expenses and should not pay for another State Bar representative's expenses. There will be no reimbursement for the expenses of a spouse, guest or pet who accompanies a traveler on State Bar business.
- C. Except where noted otherwise, only when a person is on Travel Status are they eligible to seek travel reimbursement as stated in this policy.
- D. A person is on Travel Status when, in the course of performing duties for the State Bar, they travel to one or more destinations that are at least thirty miles (one way) from their primary workplace.
- E. Volunteers are not allowed to make purchases or render services for the State Bar. All purchases or services should be initiated by State Bar employees through Procurement.

IV. REPORTING GUIDELINES

A. EXPENSE REPORT

1. Responsibilities: It is the responsibility of the travelers to timely submit to their State Bar liaison a completed, legible *Expense Report* with supporting documentation for approval. Any additional explanation or justification memos required must be approved by the travelers' executive manager, unless noted otherwise. It is the responsibility of volunteers' approvers to assure that *Expense Reports* accurately comply with this policy and are timely forwarded to Finance for approval prior to reimbursement.

2. Expense Report: The *Expense Report* form (example: [Appendix A](#)) is used to reimburse individuals for out-of-pocket travel expenses while conducting business for the State Bar.
3. Travel Dates: Travelers can use the *Expense Report* for a maximum of two trips conducted within seven consecutive days. If a single trip goes over seven consecutive calendar days, a separate Expense Report is required. Monday's date of week one will be used for audit purposes when trips span a single calendar week.
4. Expense Report Receipts: Original issued receipts for any expense other than per diem meals must be attached to the *Expense Report*. Receipts for local transportation less than \$25 (that are indicated lost and irreplaceable) and receipts for public transportation (where no receipt is provided) are reimbursable **if** amount claimed is deemed reasonable as compared to other similar travelers' expenses. Finance reserves the right to reduce or deny the request for reimbursement for any expense not substantiated by an itemized receipt. Reimbursement for **any items** claimed under Miscellaneous Expense will not be approved without a supporting itemized receipt. Receipts must contain itemized pricing and reflect appropriate travel detail (e.g., departure/arrival times, dates, service class, upgrades, additional fees, etc.). Statement summaries and non-itemized credit card receipts are not acceptable substitutes for receipts. Electronically issued receipts for online purchases are considered original issued receipts. To substantiate a charge for reimbursement, receipts for lodging or car rentals must be in the name of the traveler.
5. Deadlines: The deadline for submitting an *Expense Report* to an approval authority is 30 calendar days after the traveler incurs the expense. *Expense Reports* received by Finance after 60 calendar days will not be processed for payment unless expressly approved for late payment by the Executive Director or designee. *Expense Reports* submitted to Finance will be processed within 10 days of receipt. Incomplete, incorrect, or illegible reports will be returned to the departmental liaison for correction, which may result in delay or non-reimbursement of a specific item.
6. Revisions: *Expense Reports* must be verified for accuracy and properly approved by the responsible executive manager prior to submission to Finance. All modifications to a handwritten *Expense Report* must be individually initialed by the person making the correction. Any revisions necessary to correct or add to a previously submitted *Expense Report* must clearly state "revised" and include a copy of the original *Expense Report* attached.
7. Gifts, tokens of appreciation and other non-travel related expenses are not reimbursed under this policy.
8. To ensure policy control and maximize approval and audit efficiencies all volunteers are strongly encouraged to use the current 2014 online electronic form for proper calculations and per-diem limit enforcement. Handwritten forms or forms from prior years will not be accepted for 2014 travel.

B. PURCHASING CARD REPORTING

Pcards are not to be used for volunteer travel.

V. REIMBURSABLE EXPENSES

While conducting authorized business, State Bar volunteers defined in the scope of this policy are eligible to be reimbursed for out-of-pocket expenses related to transportation, lodging, and meal costs.

A. TRANSPORTATION

1. Personal Automobile

- a) Travelers required to use a personal automobile to conduct State Bar business will be reimbursed for mileage at the Internal Revenue Service approved rate regardless of whether Travel Status requirements are met, consistent with the following guidelines:
 - i) Reimbursable mileage is incurred when a traveler leaves their primary workplace location on State Bar business and returns to that same location.
 - ii) Reimbursable mileage is incurred when a traveler does not report to their primary workplace during the workday because of State Bar business.
 - iii) Reimbursable mileage is incurred while conducting State Bar business while on the way to or from home or from the primary workplace. Reimbursement will be for that mileage in excess of normal commute round trip mileage between home and the primary workplace.
 - iv) Travelers who elect to drive rather than fly to conduct State Bar business will not be reimbursed in excess of the most economical form of transportation. To seek reimbursement for alternate travel arrangements, travelers must complete the Alternate Travel Comp (*Expense Report* tab 2) and attach dated documentation from the Concur travel site to *Expense Reports* to substantiate comparable travel expense (lodging, airfare, rental car). If comparable documentation is missing, Finance reserves the right to reduce the requested amount that is not deemed reasonable as compared to other similar travelers' expenses or other available historical travel benchmarks. Mileage reimbursement in excess of what comparable airfare would have cost is not reimbursable. Exceptions may be permitted for special ADA accommodations as required. Written explanations must accompany *Expense Reports* and be approved by the traveler's executive manager.
- b) Fuel that is put into a private vehicle is not reimbursable and cannot be added to an *Expense Report* as a separate expense. The mileage rate is intended to reimburse fuel costs, maintenance and other depreciation for private auto use.
- c) Damage to personal autos while being used on State Bar business is not covered because a portion of the mileage reimbursement is intended to defray the insurance cost to the individual.

2. Car Rental

- a) Rental cars may be used only when necessary and economically practical compared to other modes of transportation. When a rental car is required to conduct State Bar business away from the individual's primary workplace, the State Bar will reimburse the expense in conformity with the terms and guidelines of this policy regardless of whether the Travel Status requirements are met.
- b) The State Bar does not maintain a master contract with any rental car agency however; the California State Travel Program does maintain a master agreement with Enterprise Holdings (Enterprise, National) that offers reduced government rates to State Bar business travelers (see [Appendix B](#) for booking details). As a general rule, automobiles rented should be limited to economy models, including the agency's sub-compact, compact and standard size cars only. Exceptions may be permitted when volunteers are required to drive a large vehicle (truck /van) in order to economically deliver materials, to accommodate a physical limitation, or when multiple travelers are driving together and need the additional space for passengers, luggage and other meeting materials. Exceptions may be permitted for a 4-wheel vehicle to provide safe transportation during

inclement weather. Exceptions must be approved by a Senior State Bar manager in advance of rental. Written explanations must accompany *Expense Reports* and be approved by the traveler's executive manager prior to reimbursement.

- c) Reimbursement for car rentals will be made where it is a justified economical use of the traveler's time in the particular circumstances. Written justification must be provided for any car rental that exceeds a total of \$250 per rental period.
- d) Alternatives to a rental car should be evaluated based on cost and time. In some cases, it is less expensive and more convenient to use cab service, hotel shuttle or public transportation.
- e) The State Bar carries insurance that covers travelers (both employees and volunteers) when renting a vehicle while on State Bar business. Thus, travelers **should not** elect to carry the additional collision and liability coverage offered by rental agencies when traveling on State Bar business. All additional insurance elections will be deemed a personal expense chargeable to the traveler.
- f) In the event a traveler rents a vehicle to be used for combined business and personal use, the traveler will not be covered by the State Bar's insurance when the car is used for personal purposes. To assure the traveler's personal liability is addressed in such circumstances, travelers are encouraged to obtain the appropriate insurance for the period the traveler is using the car for personal purposes. All additional insurance elections will be deemed a personal expense chargeable to the traveler.
- g) Individuals are responsible for any car rental charges, fuel, insurance charges and liability while on personal business. The State Bar is not responsible for any costs, injuries or damages caused as a result of a rental car used for personal purposes.
- h) Fuel costs incurred for rental cars while on State Bar business are reimbursable. Whenever practical, travelers should return cars with a full tank of gas to avoid excessive refueling charges by car rental companies. Car rental companies offer a Fuel Purchase Option that allows for the purchase of a full tank of gas allowing the car to be returned with an empty tank. This option may be cost-efficient but should be used only if the car will be driven enough to exhaust close to a full tank of fuel.
- i) Additional charges for luxury-class-upgrades, SUVs, electric cars, convertibles, sports-cars or fees for frequent-flyer points will not be reimbursed beyond the standard economy rental available.
- j) Compliance with the rental car agency agreement is the responsibility of the traveler who signs the rental agreement. Please be aware of provisions in the rental agreement that prohibits any other person from driving the car.
- k) In the event of an accident, follow these steps:
 - Attend to any medical issues.
 - Report to appropriate law enforcement agencies immediately.
 - Consult the rental contract and follow its instructions.
 - Promptly submit an accident report to your State Bar liaison.

3. Air Travel

- a) The State Bar is now participating in the California State centralized travel program managed exclusively by the TravelStore. Agency booking fees other than the TravelStore will not be reimbursed.
- b) Travelers must contact the approved State Bar travel agency, the TravelStore, for all travel in excess of \$ \$500 (round-trip fare) unless State Bar manager approval is obtained prior to the trip ([Appendix C](#)). For round-trip flights under \$500, travelers may

use their discretion to determine whether to use the State program or to book tickets directly with the airline. For round-trip flights over \$500, travelers may book tickets directly with the airlines or other travel agency, but the rate booked must be as good as or better than the documented quote available from the TravelStore's online Concur travel portal. Documentation from this site of comparable quotes must be attached to each *Expense Report* to justify use of an alternate travel agency or direct-booked flights over \$500. Reimbursements for any other agency booking fees will be limited to the Travel Store's contracted rates (see Appendix C for booking fees).

- c) Compensation for air travel will be limited to the cost of a coach or economy fare and any additional baggage fees, if required (per below). The cost of preferential seating, business select services, pre-boarding or any other accommodation upgrade, will be deemed a personal expense chargeable to the traveler. Any remaining Business Select fares booked on Southwest will be reduced \$22 per travel leg. Charges or fees incurred from change of flight schedule for personal convenience is not reimbursable, although may be permitted for business purpose if reason for business purpose accompanies *Expense Report*.
- d) Many airline carriers have a policy charging extra for baggage during the airport check-in process. The State Bar's policy is to only pay for the cost of the ticket and one or two bags per traveler. If a baggage fee is paid at the airport, the traveler must submit the receipt with their Expense Report for reimbursement. For travelers requesting reimbursement for more than two bags for business-related purposes, a justification memo must be attached (e.g. a computer equipment, presentation handouts, tradeshow exhibits, etc.).
- e) Airline exchange ticket receipts are acceptable documentation and should be attached to the original flight booking receipt for reference, with a notation to specify which leg was modified.
- f) Travelers are to use the lowest airfares available without regard to the accrual of personal frequent flyer miles.

4. Rail Service

Coach rail service may be used in lieu of air and/or ground transportation when necessary and economically practical compared to other modes of transportation. Reimbursements will be made based on the most (reservable) economical service class available. Preferential or other luxury upgrades are not reimbursable, even if the upgrade is less than coach air service or other ground transportation between the same city pairs.

5. Shuttle/Taxi Service

- a) Shuttle van service may be used, time permitting, for trips both to and from the airport where economically feasible. Actual cost including customary gratuity will be reimbursed. Tipping is optional, and as a general rule, tip should not exceed 15 percent of the total fare.
- b) Actual cost incurred for taxicab service, including customary gratuity, will be reimbursed when a less expensive service is not suitable. When taxi service is required to conduct State Bar business away from the individual's primary workplace, the State Bar will reimburse the expense in conformity with the terms and guidelines of the Travel and Business-Related Expense Policy regardless of whether the Travel Status requirements are met. Tipping is optional, and as a general rule, tip should not exceed 15 percent of the total fare for typical airport-to-meeting site transport. Tips for local cross-town trips are typically in excess of this 15 percent rule, depending on trip brevity. Airport trips may be covered by a fixed flat fee, and the metered fare or flat fee fare can be selected by the traveler at the payment point, whichever is more economical.

- c) A higher-cost limousine or Towncar service is not reimbursable unless a less-expensive service is unavailable. Written explanations must accompany *Expense Reports* and be approved by senior management.

6. Transit Fees, Parking and Fines

- a) Tolls, parking fees and public transit fares incurred by travelers on State Bar business are reimbursable expenses and must be identified as such on *Expense Reports* under tolls/parking fees. When travel is required to conduct State Bar business away from the individual's primary workplace, the State Bar will reimburse these expenses in conformity with the terms and guidelines of this policy regardless of whether the Travel Status requirements are met.
- b) Parking tickets and traffic fines incurred by travelers will not be reimbursed.

B. LODGING

1. When lodging away from home is required to conduct State Bar business and Travel Status is not invoked, the State Bar will reimburse lodging expenses at the authorized rates ([Appendix D](#)) and in conformity with the terms and guidelines of this policy regardless of whether the Travel Status requirements are met.
2. Individuals engaged as speakers for State Bar sponsored programs may be reimbursed for the actual cost of a standard single accommodation hotel room per the individual custom contract terms and conditions.
3. Reimbursement for lodging expenses will be made for the actual expense of single accommodations, up to the maximum authorized rates or pre-negotiated meeting accommodations by State Bar staff. If no pre-arranged contract exists, travelers should request whether contract or government rates are available when reservations are made. Some hotels may request documentation to verify that traveler is conducting government business. The State of California and/or the State Bar negotiate favorable contract rates with various hotels ([Appendix E](#)).
4. Lodging must be provided by a commercial establishment in the travel accommodation industry (e.g. hotel, motel, executive leased apartments, etc.). No reimbursements will be made for stays at personal residences or other barter or in-kind arrangements.
5. The State Bar covers the cost of the hotel room and necessary business related telephone calls, parking, internet charges and business center expenses. Travelers should utilize their own wireless devices wherever feasible if more economical than using the hotels' services. Travelers are responsible for covering their personal incidental expenses including personal telephone calls, room service and other in-room self-service items. All hotel guests are asked to provide a personal credit card at the time of check in to cover the cost of personal incidentals. See Section V.D., Communications & Incidentals.
6. Any charges resulting from failure to cancel lodging reservations are not the responsibility of the State Bar unless the reason for failure to cancel in time is business-related or due to an unavoidable personal emergency and a statement of same is included on the *Expense Report*.
7. Optional, but reasonable gratuities offered for the handling of luggage, valet service, and accommodation maid service are reimbursable expenses but should not exceed an average of \$6.00 per travel day. Finance reserves the right to adjust deviations to standard tipping amounts claimed to reasonable and customary levels (see [Appendix F](#)).

C. MEALS

1. Travel Status Meal Guidelines

- a) Individuals on Travel Status will be entitled to their own meal expenses up to the maximum amount allowed under the authorized per diem [meal rates](#). Payment will be made only for the traveler's own expenses. Each traveler is responsible for his/her own travel and meal expenses-- one person may not use State Bar resources to pay for the meals of other travelers.
- b) If the cost of a meal exceeds the approved per diem rates, only the maximum per diem rate will be paid by the State Bar.
- c) Eligibility for meal per diems is based on the time(s) during which an individual is on Travel Status. The following guidelines apply:
 - Breakfast: Travel status before 7:00 a.m.
 - Lunch: Travel status at 12:30 p.m.
 - Dinner: Travel status after 7:00 p.m.
- d) The meal per diem may not be claimed when a meal is otherwise provided at State Bar expense (e.g. a State Bar catered lunch, conference meals, etc).
- e) Tips for restaurant service are considered to be part of the per diem rate and are not reimbursable beyond the per diem rate.

2. Non-Travel Status Meal Guidelines

- a) The cost of business-related meal expenses may be compensated when an individual is not on Travel Status if the meal was work related and in conditions beyond the individual's control. Examples include:
 - *A volunteer is not on Travel Status but is required by the State Bar to staff or attend an off-site meeting or function where a meal is required under circumstances beyond the volunteer's control. This includes staffing the Bar examination.*
 - *A volunteer is not on Travel Status but is required by the State Bar to attend off-site training where a meal is required under circumstances beyond the volunteer's control.*
 - *A volunteer is not on Travel Status but is required by the State Bar to stay overnight away from home during authorized meal times.*
- b) A travel *Expense Report* should be used to report these expenses. The report must include the purpose of each business-related meal and the conditions that justify payment.
- c) The above *standards* governing travel status meals (V.C.1. through 3., rates, tips, etc.) apply to non-travel status meal reimbursement, except for the requirement of being on travel status.
- d) Except as set forth in Section V.C., meal reimbursement is not allowed where State Bar representatives are not on Travel Status and have a meal together incidental to a State Bar function they are attending or staffing.

3. Catered Meals

- a) Refreshments and/or meals may be catered at State Bar expense at State Bar meetings and events provided that the attendees are not exclusively State Bar employees and the subject matter of the event is not routine internal State Bar business or staff meetings. Individuals attending such activities as part of their duties are entitled to partake of the catered meal, regardless of whether they are

on Travel Status. Meal per diem rates do not apply when a catered meal is provided.

- b) Catering is defined as a contracted for food and beverage service. Catering can either be served on State Bar, hotel or convention site premises, or pre-booked contract meeting accommodations at a commercial restaurant (e.g. catering for Board of Trustees meetings in LA, SF or offsite). Individual meals ordered off a restaurant menu, absent a food and beverage contract with the provider, does not meet this definition of catering, whether for an entire committee or a subset of same. This definition may be expressly waived by the Executive Director for special Board of Trustees functions.
- c) In certain circumstances, a State Bar meeting or function may occur in which the cost of a meal or refreshments is included in the registration fee or is to be reimbursed by attendees individually, in which case traveler may not claim individual per diem reimbursement.

4. Alcoholic Beverages

Alcoholic beverages or corkage fees are not generally reimbursable travel/ business expenditures.

D. COMMUNICATIONS & INCIDENTALS

- 1. Reimbursement is provided for reasonable expenses incurred in making business-related telephone calls and limited calls to the individual's home resulting from the requirements of business. As long as the calls are required by State Bar business, the State Bar will reimburse these expenses in conformity with the terms and guidelines of the Travel and Business-Related Expense Policy regardless of whether the Travel Status requirements are met.
- 2. Expenses incurred incidental to State Bar business such as copying costs, remote internet connection fees, facsimile costs and other expenses required to conduct State Bar business, will be reimbursed in conformity with the terms and guidelines of the Travel and Business-Related Expense Policy regardless of whether the Travel Status requirements are met.

ALTERNATE TRAVEL COMPARISON**OPTIONAL**

TRAVELER NAME	Thomas Jefferson	GROUP	Governance Council
TRIP PURPOSE	State Bar Annual Meeting		

Form is an *optional tool* travelers can use to request and document alternate forms of travel preferred for personal reasons. Fields that default from page one can be overridden if necessary. Complete the highlighted yellow fields to compare alternate modes of business travel. If requesting an alternate transportation mode, list justification and forward to liaison for manager approval before travel commences. Expense Reports which do not contain proper approvals or travel documentation may have the reimbursement amount requested limited to the more economical travel method available.

HOME LOCATION	1 Monticello Way	Charlottesville	VA 22902
MEETING LOCATION	San Jose CA		
TRAVEL WEEK OF	6/30/2014	MEETING DATE START	7/2/2014
		MEETING END DATE	7/5/2014
HOME AIRPORT	IAD	MEETING AIRPORT	SJC
		RETURN AIRPORT	IAD
IS MEETING AT A STATE BAR OFFICE LOCATION?	other		

TRAVEL LEGS

	Leg 1: Home >>> Airport		Leg 2: Airport >>> Airport		Leg 3: Airport >>> Meeting	
	miles	expense	miles	expense	miles	expense
Driving Mileage*	102	\$ 57.12	2813	\$ 1,575.28	10	\$ 5.60
Air Travel** <i>(rates per Concur Travel)</i>			RT airfare			
			\$ 502.00			
	days	airport daily rate			days	hotel daily rate
Parking	3	\$ 15.00			2	\$ 150.00
	average fare w/tip				average fare w/tip	
Taxi***	\$ 39.00				\$ 45.00	
	total rental days if start @ home				# rental days	total charge
Rental Car**	10				4	\$ 265.00
Other Travel Expense	(specify)		(specify)		(specify)	
Rate Sources	<u>* mileage</u>		<u>** air/auto rental</u>		<u>*** taxi</u>	

TRAVEL COMPS

	Mileage	Air	Taxi/Rental	Parking	Other	Totals
1. Driving own auto from home to meeting and return	\$ 3,276.00				\$ -	\$ 3,276.00
2. Driving own auto to airport, fly, taxi to meeting and return	\$ 114.24	\$ 502.00	\$ 90.00	\$ 45.00	\$ -	\$ 751.24
3. Driving own auto to airport, fly, rental car to meeting and return	\$ 114.24	\$ 502.00	\$ 265.00	\$ 345.00	\$ -	\$ 1,226.24
4. Taxi to airport, fly, taxi to meeting and return		\$ 502.00	\$ 168.00		\$ -	\$ 670.00
5. Taxi to airport, fly, rental car to meeting and return		\$ 502.00	\$ 343.00		\$ -	\$ 845.00
6. Driving rental car to meeting and return			\$ 662.50		\$ -	\$ 662.50

I am requesting the following travel itinerary:

1. Driving own auto from home to meeting and return

The requested travel itinerary above necessary for the following reason(s):

Personal reasons necessitate that I be able to combine other personal side-trips in my travel west.

I prefer the travel itinerary above for personal reasons and understand my reimbursement may be limited to a more economical method as indicated above.

I am the Executive responsible for this traveler's attendance at this event and approve this rate.

date: _____

APPENDIX B

Automobile Rental

When other ground transportation is not feasible or economical, automobile rental travel arrangements for both employees and volunteers may be made through the State Bar's contracted travel agency, the TravelStore by calling toll free 1-877-454-8785 or using their [website](#). Agency booking fees for the entire reservation will vary depending on whether they are made via a live agent (\$10) or via the Concur online portal (\$5).

The State of California maintains a master contract with Enterprise Holdings, which includes the auto-rental family of [Enterprise](#) and [National](#) auto rental lines. Unless there is no service or availability of vehicles at the travelers' travel-status location, employees and volunteers should always book through one of these two agencies for maximum savings. Auto insurance is automatically included for all state automobile rentals and nothing more should be added.

APPENDIX C

Airline Travel

Air travel arrangements for both employees and volunteers may be made through the State Bar's contracted travel agency, the TravelStore by calling toll free 1-877-454-8785 or using their [website](#). Agency booking fees for the entire reservation will vary depending on whether they are made via live agent over the phone (\$10) or via the Concur online website (\$5). If any portion of trip utilizes Southwest Airlines, this fee increases to \$14 for trips booked with the assistance of a live agent and \$12 for trips booked via the Concur online portal. This increased fee is due to the airline's contract with the California State travel program.

Travelers must set up their own travel profile online at the Concur travel portal prior to booking a trip. See [Appendix G](#) for the Concur profile setup instructions.

APPENDIX D

Authorized Travel Expense Rates: Effective January 1, 2014

Lodging:

(Within city limits, excluding all taxes)

San Francisco.....	\$205.00
Los Angeles	\$135.00
All other areas.....	\$150.00

Volunteer Travel Meals:

Breakfast.....	\$ 7.00
Lunch.....	\$11.00
Dinner.....	\$23.00

Mileage:

The personal auto mileage reimbursement rate is 56¢ per mile driven. The mileage reimbursement rate will be adjusted to mirror the reimbursement rate established by the U.S. Internal Revenue Service for business-related reimbursement. These rates are imbedded in the formulas of the online [Expense Report](#) and will be adjusted on the effective date of any rate change.

APPENDIX E

Hotel Reservations

Favourable government rates are often available at the many properties near the State Bar's office locations: the [Millennium Biltmore Hotel](#), the [Omni Hotel](#) and at the [LA Hotel Downtown](#) (Los Angeles) and the [Harbor Court](#) and [Griffon Hotel](#) (San Francisco). In the absence of a negotiated State Bar group contract, the State of California has negotiated limited number of discounted hotel room rates at a number of hotels in California for individual travelers, subject to availability and certain black-out dates. Though travelers are not required to use these hotels, they must still abide by the established hotel per diem for the city they are visiting.

Individual travelers can book hotel rooms directly through the Concur travel portal, or with the assistance of your direct program liaison who will arrange through the State Bar's local Travel & Information Services Coordinator. Hotel accommodations for 10 or more participants usually will require the assistance of the travel coordinator and a formal contract processed through Procurement.

Direct Booking

Hotel reservations for both employees and volunteers may be made through the State Bar's contracted travel agency, the TravelStore by calling toll free 1-877-454-8785 or using their [website](#) (Concur portal). Only one booking fee is charged per reservation, not for each individual travel component. When requesting rate availability online, the contracted state rates will post first, if available. Travelers can pay for their room when they check out using their own personal credit card and requesting reimbursement using the standard *Expense Report*.

State Bar Travel Coordinator Assistance

Travelers needing 10 or more rooms and/or requiring assistance in Los Angeles should have their program liaison contact Alice Daniels (ext 1116) to search for properties, secure the reservations, establish billing, and prepare the tax exempt form. Travelers needing these same services in San Francisco should contact Martha Prieto (ext 2562).

Contracted Event

Travelers attending a State Bar contracted-for meeting event should book their rooms according to the specific instructions of the hosting department in order to satisfy room-block commitments.

APPENDIX F

Agency Tipping Guide

Type	Amount	Per / Comments	Allowed*
MEALS			
Waitstaff / bartender:	n/a	<i>meals are reimbursed as a per diem inclusive of customary service fees</i>	\$0
Coatroom attendant:	\$1	per coat	\$1
Room service waiter:	n/a	<i>meals are reimbursed as a per diem inclusive of customary service fees</i>	\$0
Washroom attendant:	n/a		\$0
TRANSPORTATION			
Taxi driver:	15%	of total fare with a minimum of \$2 for very short cross-town trips	15%*
Shuttle driver:	15%	of total fare per person in party	15%*
Parking valet / garage attendant:	\$2	to bring your car to you (nothing to park)	\$2
Gas station attendant:	n/a		\$0
Skycap at airport:	\$1	per bag if you check-in curbside	\$1
LODGING			
Hotel bellhop:	\$1	per bag for bringing luggage to your room (\$2 minimum if 1 bag)	\$1
Hotel doorman (luggage):	\$1	per bag for help with luggage	\$1*
Hotel doorman (taxi):	\$1	per person for hailing a cab	\$1
Hotel housekeeper:	\$2 to \$5	per night	\$3*
Hotel concierge:	n/a		\$0
Desk clerk:	n/a		\$0

* Amounts allowed are to be used as a general guideline, subject to the additional services rendered and effort extended (e.g., moving large amounts of meeting materials and for special event set-up and management). As a public agency, travelers should extend customary gratuities to service providers, however, within the context of the agency's public service role. Travelers should refrain from personal tipping habits that might reasonably be perceived to be an improper use of public funds. Tipping in excess of these amounts is up to the traveler, but may be subject to adjustment on the Expense Report reimbursement request. Total gratuities cannot exceed the state-limit average of \$6 total per travel day.

Sources: U.S. News & World Report, Emily Post Etiquette, CNN Money, TripAdvisor

APPENDIX G



Dear State Bar Volunteer:

We are pleased to announce a new travel partnership!

Effective January 1, 2014, the *TravelStore* will replace *Giselles Travel* as our exclusive travel agency for both employees and our traveling volunteers. To use the new *Concur* travel portal, travelers must first sign up and establish their own travel profile per the simple steps outlined below.

You are not required to use the *TravelStore* as your travel agency, however, service fees from other travel agencies cannot exceed the state-contracted rates of the *TravelStore*. Note that the policy requires that any round-trip airfare exceeding \$500 must be booked through the *TravelStore* directly via phone or through their Concur site online. Any comparables that are intended to be used to document alternate forms of travel must be provided from this agency prior to departure date.

Please note that new rates and reimbursement caps have been set for those traveling on State Bar-related business for the 2014 calendar year. Please take a moment to familiarize yourself with this policy to minimize any potential delays in the reimbursement of your out-of-pocket travel expenses. Unless a State Bar contracted meeting event allows otherwise, any reimbursements made for your travel must conform to this new policy. All requests must be submitted using the appropriate 2014 Expense Report, preferably completed electronically using the built-in formulas.

Your Volunteer Travel & Business-Related Expense policy and associated volunteer Expense Report can be accessed directly from this document, or through the State Bar's Commissions & Committees web page. Your State Bar program coordinator may also be providing this material via your own area's shared workspace as well.



Traveler Registration



- 1 Go to <https://www.concursolutions.com/registration/>. Enter the State Bar's registration code **cal1374**.
- 2 Enter your information in the following screen. Your Concur Login should be your work email address.
- 3 State Bar system administrators will receive an email requesting approval for your account. Once approved (normally within 24 hours), you will receive two emails in your work email address: a "Welcome to Concur" email and a "Password Reset Request" email.
- 4 Please reset your password within 24 hours of receipt of the email. If you can't reset it within 24 hours, contact a TravelStore agent (1-877-454-8785) and request they reset it.
- 5 Once you have reset your password, you can log in to the Concur system to fill out your travel profile. Your travel profile can be as detailed as you'd like it to be. You can add all your air travel, hotel and car rental preferences, frequent flyer numbers, etc. Your travel profile will be saved for future travel arrangements and can be used to create reusable templates for commonly repeated travel scenarios.
- 6 Now you're ready to book your travel. You can book your travel through the TravelStore's website (<https://www.concursolutions.com>), or by calling toll free 1-877-454-8785 if you prefer to speak to a live travel agent. The TravelStore account is linked to the State Bar's master account, so air and rail reservations will be billed directly to your program's cost center. Hotel and car rentals, however, will be billed to you directly, so you will need to enter your personal credit card information to pay for these charges.