



<b>TITLE:</b> Stony Brook Foundation Travel Policy	<b>POLICY CATEGORY:</b> Stony Brook Foundation, Inc.
<b>ISSUING AUTHORITY:</b> Stony Brook Foundation, Inc.	<b>RESPONSIBILITY:</b> Stony Brook Foundation, Inc.
<b>PUBLICATION DATE:</b> 05/01/2024	<b>NEXT REVIEW DATE:</b> 05/01/2026

## **POLICY STATEMENT/BACKGROUND**

This policy is intended to govern the use, reimbursement and reconciliation of Stony Brook Foundation (the “Foundation”) accounts for expenses associated with travel and business conducted on behalf of Stony Brook University (the “University”).

The use of Foundation accounts for travel and business related expenses must be in support of the mission of the Foundation and University, specifically when travel is undertaken in connection with:

- Fundraising activities, including donor cultivation, solicitation and stewardship
- Programs or other activities funded by the Foundation
- Foundation administration

## **POLICY**

The following guidelines should be followed by all State or Research Foundation (RF) employees using Foundation funds for business travel while in Travel Status (defined as more than 35 miles from either their residence or the University).

### **General Travel Guidelines**

- The Foundation is exempt from New York State and local sales taxes. When traveling within NYS, travelers should use the [Sales Tax Exempt Organization Certification](#) “ST-119.1” form.
- Itemized receipts must be submitted for all Foundation funded travel expense payments and reimbursements. However, the use of a per diem rate for meals (as set by the IRS) is allowable with supervisor approval.
- Reasonable expenses such as taxis, bus and train fare, tolls and parking fees may be reimbursed without receipts for instances in which a receipt could not be obtained or was lost. In such cases, the traveler must provide a written, signed explanation that includes the type of expense, date, amount requested for reimbursement and the reason for the missing receipt. Justification must also be presented and approved by the Account Manager. In the case of lost or missing travel meal receipts, the traveler must choose reimbursement at the per diem meal rates.
- Travel expenses charged to a Foundation corporate card must be in accordance with the Foundation Travel Expense Policy and the Corporate Card Policy. Reconciliation of all charges should be submitted through the [CONCUR](#) platform, where it will be routed to the



cardholder's supervisor and account manager for approval, and finally to the Foundation Business Office for approval and payment.

- In general, the Foundation has voluntarily adopted and adheres to the New York State travel bans on non-essential travel and the international travel guidelines put forward by the University via the [University Travel Policy](#). Please consult the University's travel guidelines before securing any foreign travel reservations.

## **Allowable Travel Expenses**

Allowable travel expenses may include but are not limited to the following:

- Commercial airfare, train, bus, subway, taxi, car service, rental vehicles, rideshare and fuel for the rented vehicle, tolls, parking, and personal vehicle mileage. For the use of a traveler's personal vehicle, the federal standard mileage rate will be applied for actual (non-commuting) miles.
- Collision Damage Waiver (CDW) or Loss Damage Waiver (LDW) insurance when renting a vehicle.
- Personal meals while in Travel Status.
- Tips (not to exceed 20%) may be reimbursed upon submission of original receipt with included tip noted on the receipt.

## **Non-Reimbursable Expenses**

Personal, non-business related expenses are considered non-reimbursable expenses.

## **Travel Methods and Associated Liability**

The following travel methods may be used for business travel when in Travel Status. In general, the most economical method of transportation should be used for Foundation funded travel.

### Rental Vehicles

- In general, vehicle rental, at the most economical rate, is encouraged for any travel extending beyond New York City. The cost of renting a vehicle and fuel for the rented vehicle will be funded upon submission of original itemized receipts.
- Vehicles should be rented in the name of Stony Brook Foundation, Inc. to ensure that both the Foundation and the traveler are properly covered by insurance. This also eliminates any confusion regarding liability for coverage in the event of an insurance claim.
- All rental agreements must note the Foundation's campus address, not the individual's home address, to further protect the traveler from being held personally responsible by the rental company for liabilities resulting from business use of vehicles.
- All travelers regardless of payment method are required to purchase the optional Collision Damage Waiver (CDW)/ Loss Damage Waiver (LDW) coverage to ensure protection from losses due to damaged vehicles. If the LDW or CDW insurance was not



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purchased, the traveler will first be personally liable for damages incurred to the vehicle. Damages not covered by the traveler's personal insurance company will then be covered by Foundation.

- In the event of an accident, traveler must notify the Foundation Business Office immediately. The traveler must provide an accident report with the name of the driver, insurance information, proof of car rental payment and the purpose of the business trip and submit all documentation to the Foundation's Business Office.

## Personal Vehicle

- The [federal standard mileage rate](#) for non-commuting mileage will be applied for the use of a traveler's personal vehicle, documented by the [Statement of Automobile Travel](#) and supported by a widely used Web Map Server such as Google Maps. Mileage is calculated taking the lesser number of miles between your official workstation or home to final destination. Fuel charges for a personal vehicle when in Travel Status are not allowable.
- The Foundation carries a non-owned automobile liability insurance policy to protect the Foundation against claims and losses arising from injury or property damage to third parties. Additionally named insurers covered under the Foundation's policy include employees and other travelers working within the scope of or conducting Foundation funded business.
- The Foundation's policy does not reimburse travelers for damage to personal vehicles or their personal auto policy deductible. In the event of an accident, please note:
  - The underlying liability coverage on the personally owned automobile driven by the traveler becomes primary for the payment of any claims by the third party. If the driver of the personally owned automobile is not the owner, any valid and collectible automobile insurance carried by the owner becomes primary. The insurance carried by the driver of the automobile then becomes secondary.
  - Personal Accident Insurance (PAI), Personal Effects Insurance (PEI) or Supplementary Liability (SLP) Insurance expenses will not be funded by the Foundation.
  - After all valid and collectible underlying automobile insurance coverage has been exhausted, the Foundation's non-owned automobile insurance will cover the amount of any valid claim by the third party that exceeds the underlying policies.

## Ground Transportation

- The cost of tolls, parking, and mileage, or car service related to ground transportation (e.g., travel to and from and parking at the station) will be funded upon submission of original itemized receipts.
- Travelers are expected to use the best price available, appropriate coach-class ground transportation. Business class may be permissible with supervisory approval. Travelers must provide documentation and justification to substantiate the business class purchase.



## Commercial Air Travel

- Travelers are expected to use the best price available for appropriate coach-class airfare. Business Class is permissible with supervisory approval. Travelers must provide documentation and justification to substantiate the business class purchase.
- The cost of air travel including Wi-Fi will be funded upon submission of original itemized receipts.
- The cost of tolls, parking, and mileage, or car service, related to air travel (e.g., travel to and from and/or parking at the airport) will be funded upon submission of original itemized receipts.
- Air travel insurance is not reimbursable through Foundation funds.

## **Lodging, Meals, and Incidental Expenses**

For all lodging accommodations and meals while in Travel Status within New York State, the Foundation's Sales Tax-Exempt Organization Certification ST-119.1 must be presented.

- Lodging accommodations for all overnight travel should be secured at a safe, reputable establishment. All invoiced charges should be reviewed at checkout and any additional hotel services outside the scope of Foundation funded business should be invoiced separately and paid for by the traveler. Lodging reimbursements or vendor payments require the submission of original itemized receipts.
- Costs incurred for personal meals (breakfast, lunch and dinner including beverage and gratuities) while in Travel Status are allowable and require the submission of original itemized receipts. Travel to and from meals is not reimbursable.
- In addition to the traveler's personal meals, expenses for business meals & entertainment while in travel status will be funded when a specific business purpose exists. It requires the submission of original itemized receipts, agenda, and list of attendees.
- For additional guidance, please refer to the [Stony Brook Foundation Business Meal & Entertainment Expense Policy](#).

## **REVIEW AND APPROVAL AUTHORITY**

The following personnel/offices share the responsibility in overseeing the administration, reconciliation and reimbursement of donor funds as follows:

### Traveler

State or Research Foundation (RF) employees using Foundation funds for business travel while in Travel Status (defined as more than 35 miles from either their residence or the University) are responsible for administering and adhering to the travel guidelines as outlined in this Policy.



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Travelers must certify that their travel is secured and has been performed in accordance with applicable Foundation policies. When planning international travel, the traveler must submit an International Travel Request form through the [CONCUR](#) platform. This request will be routed to the Department of Enterprise Risk Management (ERM) and the traveler's immediate supervisor, and the department's account manager for review and approval.

Travelers must correctly file travel expense reimbursement reports and corporate credit card statement reconciliations by the requested submittal date on the [CONCUR](#) platform. All travelers must provide original itemized receipts, supporting documentation and justification with all expense reimbursement reports and credit card reconciliations.

### Immediate Supervisor

The Traveler's immediate supervisor must certify all international travel requests, domestic and international travel expense reimbursement payments, and travel related credit card payments to confirm that the expenses have been approved as accurate, appropriate and business related.

### Account Manager or Signatory

The account manager or signatory must certify that all payments are accurate and appropriate expenditures for the respective Foundation account, as detailed in the Foundation account description. The account manager must also confirm that the expenditures are consistent with the donor's intent when the gift and/or grant was accepted (as documented in the gift agreement or other relevant gift materials).

### Stony Brook Foundation Business Office

The Foundation business office must certify that the travel was administered in accordance with Foundation policies and procedures and authorize payment and reimbursement of justified expenses in accordance with the Foundation's travel expense policy.



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## CONTACTS

For additional information about this policy, please contact the Stony Brook Foundation:

### Stony Brook Foundation

270 Administration Building  
Stony Brook, NY 11794-1188  
(631) 632-6300

Business Office	(631) 632-6536	
Accounts Payable	(631) 632-4484	<a href="mailto:SBF_AP@Stonybrookfoundation.org">SBF_AP@Stonybrookfoundation.org</a>
Purchasing	(631) 632-2108	<a href="mailto:SBF_PO@Stonybrookfoundation.org">SBF_PO@Stonybrookfoundation.org</a>

## RELEVANT STANDARDS, CODES, RULES, REGULATIONS, STATUTES AND POLICIES

[Stony Brook Foundation Business Meal & Entertainment Expense Policy](#)

[Stony Brook University Travel Policy](#)

[New York State Travel Bans on Non-Essential Travel](#)

## ADDITIONAL LINKS

[SBF Tax Exempt Form](#)

[University Concur Homepage](#)

[Concur Log-In Page](#)

[SBF Concur International Request QuickStart Guide](#)

[SBF Concur Travel Expense QuickStart Guide](#)

[SBF Concur Credit Card Reconciliation QuickStart Guide](#)