

Retirement Plan Trustees Educational Travel Policy Comparison with City of San Jose's Travel Policies

	Plan Trustee Educational Travel Policy	City Employee Travel Policy (City Administrative Manual Section 1.8.2)	City Elected and Appointed Officials (Council Policy #9-5)
Scope of Approved Travel	Educational, administrative, and business meetings related to administration of pension plan. (Paragraph 11, 12, 13)	Authorized travel is limited to "conferences, trainings, conventions, and other functions from which the City derives a specific benefit through attendance by the traveler." (Paragraph 3.2.3)	Events where "City derives special benefits through attendance of a City representative[.]" (Paragraph C.1)
Approval to Book	<u>Preapproved List of Pension Programs:</u> None required. (Paragraph 15) <u>Foreign Travel:</u> Prohibited unless value cannot be obtained within the continental United States, to which approval from Board required. (Paragraph 16) <u>Non-Preapproved:</u> Requires Board approval for booking, unless CEO approves after / for exigent circumstance. Also limited to 3 such instances. (Paragraphs 17-18) More stringent than City Policy and City Council/Appointed Officials Policy.	<u>In-State Travel:</u> Need Travel Request completed. (Paragraph 5.1) <u>Out-of-State Travel:</u> Requires approval <u>after</u> completion of travel. (Paragraph 5.2) <u>International Travel:</u> Council Appointee is responsible for approving travel. (Paragraph 5.3) No limit on number of instances of travel.	<u>Preapproved List of Conferences:</u> No approval required where funds are available. (Paragraph D.1.b) <u>In-State or Local Official Travel:</u> No approval required where funds are available. (Paragraph D.1) <u>Out-of-State:</u> Requires City Council approval. (Paragraph D.1) No limit on number of instances of travel.

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Cash Advance	None. (Paragraph 23) More stringent than City Policy and City Council/Appointed Officials Policy.	Permitted if requested for per diem expenses. (Paragraph 4.3)	City Procurement Card rules. (Paragraph E.7)
Class of Travel	Economy/Coach. (Paragraph 29) More stringent than City Council/Appointed Officials Policy.	Coach. (Paragraph 5.5.2.2.1)	Not specified.
Timing of Travel Arrangements	3 weeks before program, to the extent possible. (Paragraph 14)	More than 4 weeks before travel date. (Paragraph 6.II.a.)	Official City representatives must notify the City Clerk approximately 6 weeks before travel date. (Paragraph C.3)
Dates for Air Travel	Cannot book flight departure more than 2 days before the pension program, absent good cause. (Paragraph 26) More stringent than City Council/Appointed Officials Policy.	Travel time is generally limited to no more than 24 hours before and/or after the function. (Paragraph 4.1)	Not specified.
Airline	United, American, Delta, JetBlue, Alaska or Southwest Airlines (or other carrier equivalent in price). (Paragraph 28)	Commercial airline or public transit whenever appropriate. (Paragraph 4.2.1)	Public carrier. (Paragraph G.1)

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Airport	Within 100 miles of Trustee's starting location or permanent residence. (Paragraph 27) The total cost cannot exceed what the round-trip airfare would have been had the trip originated from San Jose International Airport, unless CEO approves. (Paragraph 27)	Mandatory use of San Jose International Airport <u>unless</u>: (1) Flight destination not available; (2) Flight has 2+ stops or plane changes; (3) One-way travel time exceeds 2.5 hours compared to other airports; or (4) Total airfare costs \$250+ compared to other airports. (Paragraph 5.5.2.1)	Mandatory use of San Jose International Airport <u>unless</u>: (1) Flight destination not available; (2) Flight has 2+ stops or plane changes; (3) One-way travel time exceeds 2.5 hours compared to other airports; or (4) Total airfare costs \$250+ compared to other airports. (Paragraph E.3)
Airfare	Must book airfare at reasonable cost at the time of booking. (Paragraph 30) More stringent than City Council/Appointed Officials Policy.	Flight cost must be the lowest available. (Paragraph 5.5.2.2.1)	Every effort should be made to choose the lowest cost for all modes of transportation, lodging, and parking. (Paragraph E.2)
Hotel/Lodging	Expected to stay at program hotel <u>unless</u>: (1) it is sold out, or (2) there is a less expensive option 5 miles from program. (Paragraph 31)	Travelers must stay at conference hotel at the negotiated conference rate. (Paragraph 5.5.3.1) If conference hotel not available, then the traveler may stay at an alternate hotel capped at 150% of the applicable CONUS rate. (Paragraph 5.5.3.2)	Every effort should be made to choose the lowest cost for all modes of transportation, lodging, and parking. (Paragraph E.2)

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Ground Transportation	Trustees are expected to use their personal vehicles, taxis or ride sharing services to and from domestic destinations for distances under fifty (50) miles. (Paragraph 25) Reimbursement of rental vehicles require cost justification and prior approval from the CEO of ORS. Insurance is required. (Paragraph 25)	Travelers are allowed to use a City vehicle, private vehicle (at the City's mileage reimbursement rate), or a rental car (upon prior approval if the hotel is not within walking distance of the event location and shuttle service is not available). (Paragraph 5.5.1)	Carpooling is encouraged when two or more City officials are authorized to attend the same event. (Paragraph E.4) Reimbursements are available for car rentals if reasonable and necessary. (Paragraph G.5)
Meals	\$75 flat rate per day. (Paragraph 24) More stringent than City Policy.	Per diem rate determined by the applicable CONUS rate, which fluctuates per locality. (Paragraph 5.5.4)	Reimbursements are available for meals if they are not already included as part of event registration. (Paragraph G.4)
Alcoholic Beverages	Prohibited. (Paragraph 24)	Prohibited. (Paragraph 5.6.1)	Prohibited. (Paragraph G.4)
Service Tips	Reasonable tips included. (Paragraph 33)	Included for ground transportation only and capped at 20% of the total bill. (Paragraph 5.5.8)	Reasonable tips are included. (Paragraph G.2)
Mileage	Included, subject to information on starting and ending location. (Paragraph 33)	Travel by private vehicle is reimbursable at the City's mileage reimbursement rate. (Paragraphs 5.5.1.2.1 & 5.5.1.2.3)	Included if not using City vehicle. (Paragraph G.5)
Toll	Included, subject to information on starting and ending location. (Paragraph 33)	Not specified.	Not specified.

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Phone Calls	Excluded (not listed in Paragraph 33 of reimbursable expenses). More stringent than City Policy and City Council/Appointed Officials Policy.	International travelers reimbursed up to \$10/day for personal phone calls with proper documentation. (Paragraph 5.5.5)	Reimbursed up to \$10/day for personal phone calls with proper documentation. (Paragraph G.7)
Wi-Fi for Work Related Work	Included. (Paragraph 33)	Included. (Paragraph 5.5.6)	Not specified.
Laundry	Excluded (not listed in Paragraph 33 of reimbursable expenses). More stringent than City Policy and City Council/Appointed Officials Policy.	Generally not eligible, but allowable if business trip is more than 7 days and traveler is required to conduct City business for more than 5 of the 7 days. (Paragraph 5.6.3)	Generally not eligible, but allowable if business trip is more than 7 days and traveler is required to conduct City business for more than 5 of the 7 days. (Footnote 2)
Personal Expenses	Prohibited. (Paragraphs 7a & 32)	Prohibited. (Paragraph 5.6.2)	Prohibited. (Paragraph G.1-6)
Gifts	Prohibited. (Paragraph 9) More stringent than City Policy and City Council/Appointed Officials Policy.	Potentially acceptable, subject to the City's Gift Policy and Ethics Policy. (Paragraph 3.1.6)	Potentially acceptable, subject to City Council approval and the requirements of San José Municipal Code Chapter 12.08 and the Political Reform Act. (Paragraph F.1.a)
Post-Travel Documentation and Review	Required submission of Reimbursement Expense Report within <u>30 days</u> after completing the program. (Paragraph 34.a)	Required submission within <u>30 days</u> after completion of travel. (Paragraph 5.7.1)	Statement of Travel Expenses with receipts submitted to Finance Director within <u>15 days</u> of return. (Paragraph G)
Payment	Approximately <u>90 days</u> for processing of reimbursement. (Paragraph 33-34)	Reimbursement no later than the second paycheck following the date of submission. (Paragraph 5.7.3)	Reimbursement upon submission of Statement of Travel Expenses to Finance Director. (Paragraph G)