

2025 Travel and Business-Related Expense Policy: Volunteers and Contractors

January 1, 2025

The State Bar greatly appreciates the service of its many volunteers, and is able to reimburse reasonable, documented travel expenses incurred for State Bar business, pursuant to this policy. We have a very limited travel budget, so if your employer or other source is able to cover the cost of your travel expenses, that will allow us to stretch our budget and devote additional resources to the important work of the State Bar.

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.¹

SCOPE

This policy covers all employees who make purchasing card (Pcard) purchases, request checks, request travel advances, or seek reimbursement for out-of-pocket expenses incurred while conducting State Bar business. Nonemployee volunteers, such as the Board of Trustees, committee members, speakers, invited guests, and contractors engaged by the State Bar, are governed by the volunteers and contractors travel policy, which can be found [here](#). Authorization from the Director of General Services or the Deputy Executive Director is required to make exceptions to these policies.

GENERAL GUIDELINES

- A. This document addresses the most common scenarios and issues for travel and business-related expenses, but it is not necessarily exhaustive. For any scenario or issue not specifically addressed, the Office of General Services will interpret and apply this policy and any other applicable State Bar policies. In addition to the specific policy guidelines described here, travel and other business-related expenses must be reasonable, as compared with other similar travelers' expenses or other historical travel benchmarks. The State Bar reserves the right to reduce or deny a request for reimbursement or payment for any expense that is deemed either not in compliance with policy or otherwise unreasonable. Excessively high travel costs incurred because a traveler lives a significant distance from one of the State Bar's offices or a significant distance from the

¹ Should this Travel and Business-Related Expense Policy differ from the reimbursement provisions contained in a memorandum of understanding (MOU) or in rules and regulations that are applicable to State Bar employees, the MOU or other Rules and regulations shall govern, except that the rates established for lodging, meal reimbursement, and mileage in this Travel and Business-Related Expense Policy will apply to State Bar employees where such amounts are greater than those provided in the MOU or other rules and regulations.

major airports serving the State Bar's offices may be considered unreasonable. Travelers in this situation are encouraged to seek guidance from the Office of General Services before incurring costs that may be deemed unreasonable.

- B. Travelers should travel economically, considering both monetary and time costs.
- C. Each traveler is responsible for their own expenses and should not pay or seek reimbursement for the expenses of other employees, volunteers, or contractors. There will be no reimbursement for the expenses of a spouse, guest, or pet who accompanies a traveler on State Bar business.
- D. All employees have a designated State Bar headquarters office, currently either San Francisco or Los Angeles. Regardless of their place of residence or their assigned in-office or remote work schedule, employees will be responsible for all costs, in excess of the State Bar's transit and parking subsidy, associated with travel between their place of residence and their designated headquarters office.
- E. An individual is on "travel status" when, in the course of conducting business for the State Bar, they travel to a destination that is at least 30 miles away from their designated headquarters office. Absent specified exceptions described in this policy, airfare, lodging, and meal per diem expenses can only be incurred when an individual is on travel status. Other travel-related expenses and selected communication and miscellaneous expenses may be allowable whether or not the 30-mile requirement for travel status has been met, as described herein.
- F. Business-related travel for any out-of-state destination requires express prior written approval from the Director of General Services or the Deputy Executive Director. An [Out-of-State Travel Authorization](#) form must be completed and approved prior to making any travel arrangements.
- G. Requests for reimbursement should be made after the actual travel has occurred and include all out-of-pocket expenses, regardless of when tickets were purchased, or transactions occurred.
- H. Pcard expenses incurred, and claims for payment or reimbursement submitted, must be truthful and accurate and include only allowable expenses. Intentional misrepresentation on a Pcard expense report, payment request, or reimbursement claim shall be subject to disciplinary action and to those consequences permitted by law.
- I. Volunteers may incur expenses for their own travel in accordance with the volunteers and contractors travel policy. Volunteers are not allowed to make other purchases or render or engage services for the State Bar. All purchases or services must be initiated by State Bar employees through the Office of General Services.

- J. The State Bar participates in the California Statewide Travel Program, managed exclusively by the CI Azumano. Employees and volunteers can make air, car rental, and hotel reservations by calling 877-454-8785 or using the CI Azumano's [Concur online reservation system](#). (1) Travelers must set up a travel profile with the CI Azumano before using the system. Meeting and travel staff in the Office of General Services have provided instructions for setting up a travel profile to designated office and committee liaisons; travelers should contact their designated liaison for assistance setting up a travel profile. (2) Travelers are not required to book through the CI Azumano. Direct bookings and bookings through other travel agencies are permitted but booking fees in excess of those charged by the CI Azumano (\$4.50 for online booking, \$10.25 for live agent assistance) will not be reimbursed. Under some circumstances, as noted below, comparison rates from the CI Azumano site or Southwest Airlines site must be provided for reservations booked by other means or with other airlines.

REPORTING GUIDELINES

A. EXPENSE REPORT

1. **Policy Compliance:** Expense reports are reviewed for accuracy, completeness, and policy compliance by the Office of General Services, before they are sent to the Office of Finance for processing and payment. The State Bar reserves the right to reduce or deny a request for reimbursement for any expense that is deemed either not in compliance with policy or otherwise unreasonable.
2. **Responsibilities:** It is the responsibility of travelers to submit to their approver a completed expense report with supporting documentation for approval. Approvers must be in the traveler's direct reporting hierarchy within their area.^{2 3} Any additional explanation or justification memos required must be approved by the traveler's executive manager, unless noted otherwise. It is the responsibility of approvers to ensure that expense reports submitted for approval are complete and accurate, comply with this policy, and are timely forwarded to the Office of General Services.
3. **Expense Reporting:** The expense report in Oracle Fusion (cash reimbursement template) is used to reimburse individuals for out-of-pocket travel expenses while conducting business for the State Bar. Reimbursement payable to a firm or company

² The Executive Director's expense report and Pcard statements must be reviewed and approved by the General Counsel or the Board of Trustees Chair. The General Counsel or Chair may forward unresolved concerns directly to the Audit Committee Chair as warranted, who may consult with the Chair, General Counsel, and Executive Director about the matter or refer it to the Audit Committee for resolution.

³ Each Office may have additional approval requirements that travelers must adhere to.

rather than to an individual requires a [check request](#) form with supporting documentation. Independent contractors with allowances for travel expense reimbursements should follow the terms of their specific contracts.

4. **Travel Dates:** Each trip should be submitted on a separate expense report. Multiple legs of a single trip may be included on the same report.
5. **Expense Report Receipts:** PDF scans or JPG images of original issued receipts for expenses other than per diem meals should be attached to the expense report. Electronically issued receipts for online purchases are considered original issued receipts. Where receipts for public transportation are not provided by the carrier, or they contain no itemized trip detail, expenses are reimbursable if the amount claimed is deemed reasonable as compared to other similar travelers' expenses. Reimbursement for any items claimed under "other claims" will not be approved without a supporting itemized receipt. Receipts for ground transportation, air, rail, lodging, and car rental expenses must contain itemized pricing and reflect appropriate travel detail (e.g., departure and arrival times, travel dates and location, service class, upgrades, additional fees, etc.). Statement summaries and nonitemized credit card receipts are not acceptable substitutes for receipts but can serve as additional supporting documentation for original receipts that naturally lack the required detail. If booking through third-party vendors, such as Travelocity, Orbitz, etc., and no receipt is provided by the vendor, the traveler should include booking confirmations with equivalent detail. To substantiate a claim for reimbursement, receipts for lodging and transportation must be in the name of the traveler.
6. **Deadlines:** The deadline for submitting an expense report to the Office of General Services is 60 calendar days from the end of the week that the trip concludes. Late expense reports may be rejected. Incomplete, incorrect, or illegible reports may be returned to the requestor for correction or held for a second-level review, which may result in delay or non reimbursement of a specific item.
7. **Credits:** Previously paid credits issued for canceled air flights can be used to reduce the cost of other future airfare for State Bar business (unused tickets appear on the traveler's CI Azumano profile and should be used toward future travel prior to expiration). However, gift certificates, vouchers, coupons, points, or other promotional credits should not be used to purchase airfare or be used to increase traveler reimbursements.
8. Gifts, tokens of appreciation, and other nontravel-related or nonbusiness-related expenses are not reimbursed under this policy.
9. Travelers must use an expense report (found in the expenses module in Oracle Fusion) to ensure policy compliance.

B. PURCHASING CARD REPORTING

1. Purchasing Cards (Pcards) may be used by employees for travel expenses and for the purchase of other goods and services in accordance with the State Bar's Purchasing Cards (Pcards) policies. Pcards are not issued to volunteers.
2. Pcards must be reviewed and reconciled in Oracle Fusion. Please go to the expenses module and submit an expense report (Pcard template) during the designated review period at the end of each billing cycle. PDF scans or JPG images of original issued receipts must be attached to each transaction. An explanation memo with manager approval must be included to document any missing receipts. Receipts must contain itemized pricing, and for travel-related expenses, must reflect appropriate travel detail (e.g., departure and arrival times, travel dates and locations, service class, upgrades, additional fees, etc.). Statement summaries and nonitemized credit card receipts are not acceptable substitutes. Electronically issued receipts for online purchases are considered original issued receipts. Failure to review and reconcile Pcard statements during the designated review period at the end of each billing cycle or failure to provide receipts may result in the loss of Pcard privileges. Expenses for recurring monthly subscription fees charged to a Pcard require receipts only for the initial or annual renewal charge; receipts for the identical monthly charges are not required.
3. Pcard expense reports must be verified for accuracy and properly approved by the responsible approver, during the designated approval period at the end of each billing cycle.
4. Pcard expense reports and receipts are audited by the Office of General Services, which will report any audit issues to cardholders, office directors, and the Director of General Services for resolution. Failure to resolve open audit issues in a timely manner, or to comply with all Pcard policies and procedures, may result in the loss of Pcard privileges.

ALLOWABLE EXPENSES

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 (Appendix A) as follows:

- i. Reimbursable mileage is incurred when a traveler leaves the location of their designated headquarters office on State Bar business and returns to that same location.
- ii. Reimbursable mileage is incurred when a traveler does not report to their designated headquarters office during the workday, but instead reports to a different location to conduct State Bar business.
- iii. Reimbursable mileage is incurred while conducting State Bar business while on the way to or from home or the designated headquarters office. Reimbursement will be for that mileage in excess of normal commute round trip mileage between home and the designated headquarters office.
- iv. A printout from Google Maps or comparable source should be included with the expense report to substantiate mileage claimed.
- v. Travelers who elect to drive rather than fly to conduct State Bar business will not be reimbursed in excess of the cost of the most economical form of transportation. Travelers must attach dated documentation from CI Azumano's [Concur system](#) or [Southwest Airlines](#) to expense reports to substantiate comparable travel expense for lodging, airfare, rental car, etc. The Office of General Services reserves the right to adjust any requested amount that is not deemed reasonable as compared with other similar travelers' expenses or other historical travel benchmarks. Mileage in excess of what comparable airfare would have cost is not reimbursable. Exceptions may be permitted when travelers are required to drive to economically deliver materials that would otherwise be shipped at additional cost or special medical accommodations are required. Fuel that is put into a private vehicle is not reimbursable and cannot be charged to a Pcard. The mileage rate is intended to reimburse fuel costs, maintenance, and other depreciation for private auto use.
- vi. Damage to personal autos while being used on State Bar business is not covered.

2. Car Rental

- a. Rental cars may be used to conduct State Bar business when necessary and economically practical compared to other modes of transportation. All associated rental costs should be considered and compared with the equivalent taxi or other ground services available, including the taxes, surcharges, fuel expense, hotel parking, and highway tolls. Approvers are responsible for verifying that modes of

ground transportation used to attend offsite meetings are consistent for their group and that any deviations or special circumstances are noted.

- b. As a general rule, rental cars should be limited to economy models, including compact size. Exceptions may be permitted when travelers are required to drive a larger vehicle to economically deliver materials or 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 also be permitted for a four-wheel-drive vehicle to provide safe transportation during inclement weather.
- c. The California Statewide Travel Program has a master contract with Enterprise Rent-A-Car and National Car Rental. Depending on location and dates of travel, the California contract rates are sometimes less than standard rates or rates offered by other car rental agencies. Where Enterprise and National are available and less than other agencies, travelers should book with these agencies using the CI Azumano. National is used primarily for out-of-state travel and should only be used when Enterprise is not available.
- d. 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. Any additional insurance elections will be deemed a personal expense and will not be reimbursed.
- e. Personal and business purposes should not be combined on a single rental car reservation. In the event of sequential business and personal travel, a car used for business purposes should be returned at the conclusion of business, and a personal rental then initiated.
- f. Cars should be returned with a full tank of gas; prepaid tank options should be incurred only when the employee is sure that they will exhaust close to a full tank of gas.
- g. Fuel costs incurred for rental cars while on State Bar business are reimbursable and may also be charged to a Pcard. Fuel should be charged to the same Pcard account that was used to reserve the automobile rental. 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 prohibit any other person from driving the car.
- h. In the event of an accident, follow these steps:

- i. Attend to any medical issues;
- ii. Report to appropriate law enforcement agencies immediately;
- iii. Consult the rental contract and follow its instructions; and
- iv. Promptly submit an accident report to the Office of General Services.

3. Air Travel

- a. Reimbursement for air travel will be limited to the cost of a refundable coach or economy fare, subject to the further restrictions below, plus the cost of checking up to two pieces of luggage per traveler, if required. Lower-cost nonrefundable fares should be purchased if it is practical to do so. First class, business class, or Southwest Business Select fares are not permitted; if purchased, the difference between the economy and higher-class fare will be considered a personal expense and will not be reimbursed. The cost of airline memberships, preferential seating, preboarding, or any other accommodation upgrade will be considered a personal expense and will not be reimbursed. Charges incurred from a change of flight schedule for personal convenience are not reimbursable but may be permitted for business purposes or other extenuating circumstances if the reason accompanies the expense report.
- b. Southwest Airlines is the preferred airline of the State Bar of California. Southwest offers no change or cancellation fees and allows two pieces of checked luggage free of charge. Employees should choose Southwest unless the route requested is not serviced by Southwest or the fare on another airline is comparable to Southwest. Checked bag fees or change and cancellation fees incurred with another airline will not be reimbursed if the traveler could have traveled on Southwest but chose another airline. Exceptions for special circumstances must be approved in advance by the Office of General Services.
- c. Travelers may book air travel using the CI Azumano, another travel agency or directly through the airline. For round-trip flights over \$650 (inclusive of taxes and fees) on routes not serviced by Southwest Airlines, travelers may book tickets directly with other airlines or another travel agency only if the fare is equal to or less than the fare available from the CI Azumano. In such a case, the comparison fare from the CI Azumano's site must be attached to the expense report or Pcard statement. On routes serviced by Southwest, travelers may book on a different airline only if the rate is equal to or less than the rate available from Southwest. In such a case, the comparison rate from Southwest must be attached to the expense report or Pcard statement.
- d. Travelers who incur excessively high fares due to a personal choice to use an airline other than Southwest, or to use a nonstandard route when a more

reasonable route exists, will be reimbursed only for the portion of the fare equal to the comparable Southwest fare or the fare for the more reasonable route.

4. Rail Service

- a. Coach rail service may be used when necessary and economically practical compared to air or ground transportation. Reimbursement will be made based on the most economical, reservable service class available.
- b. Preferential or other luxury upgrades are not reimbursable. Note that on Amtrak, all reservable seats are called “business class” and are permitted.

5. Shuttle, Taxi, Car Service, and Rideshare Service

- a. Shuttles, taxis, car services, and rideshare services required to conduct State Bar business are allowable expenses.
- b. Tipping is optional but should not exceed 20 percent except in the case of an extremely low fare value.
- c. Airport trips may be covered by a fixed flat-fee fare, and the metered fare or flat-fee fare can be selected by the traveler at the payment point, whichever is more economical. Reimbursements should be capped at the fixed flat-fee fare plus gratuity if less than the metered fare. (In Los Angeles, the taxi rate between LAX and downtown, including the State Bar's office at 845 South Figueroa, is a flat fare, plus a surcharge for trips originating at LAX; travelers should not pay the metered fare between LAX and the LA office.)
- d. Travelers may also use rideshare options such as Uber and Lyft, as these services may cost less than traditional taxis. Any premium service offered (e.g., Uber Black, Uber SUV) will be considered a town car equivalent and subject to the limitations below. If tipping is included in the fare, any additional tipping is not permitted. If tipping is not included in the fare, it is permitted consistent with section (b) above.
- e. A higher-cost limousine, town car, or black-car service is not reimbursable unless a less-expensive service is unavailable.
- f. Employees traveling to the same destination are encouraged to share ground transportation whenever it is practical to do so.

6. Transit, Tolls, Parking, and Fines

- a. Public transit fares, bridge tolls and parking fees incurred by travelers on State Bar business are allowable expenses.
- b. Airport parking reimbursement will be limited to the onsite economy or daily rates available. Short-term, hourly, or premium parking expenses are not allowable.
- c. 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, reimbursement for lodging expenses will be made for the actual cost of a standard single-accommodation hotel room, up to the maximum authorized lodging rate (see Appendix A) or the contracted group rate pre-negotiated by State Bar staff for specific group meetings.
2. Individuals engaged as speakers for State Bar programs may be reimbursed for the actual cost of a standard single-accommodation hotel room per their individual contract terms, if applicable.
3. When the State Bar has not contracted for a block of hotel rooms for a group meeting or event, individual lodging accommodations can be reserved through the CI Azumano or directly with a hotel. If travelers encounter issues finding lodging, they may request the assistance of meeting and travel staff in the Office of General Services. Travelers should always check to see if government rates or other discounted rates are available.
4. When the State Bar has contracted for a block of hotel rooms for a group meeting or event, attendees of that meeting or event must stay at the contracted hotel to ensure that State Bar meets its contracted minimum number of rooms and does not incur fees for unused rooms. Travelers who choose, as a matter of personal preference, to stay at a different hotel, will not be reimbursed for lodging costs, and they will be required to make their own reservations without the assistance of State Bar meeting and travel staff.
5. Contracts for hotel room blocks for group meetings and events must be initiated by the Office of General Services. This requirement does not apply to the Office of Admissions for hotel room blocks for the Bar Exam.
6. Lodging must be provided by either (i) a commercial establishment in the travel accommodation industry (e.g., hotel, motel, executive leased apartments); or (ii) a short-term rental through a centralized online platform (such as Airbnb), where the

rental is advertised, payment for the rental is securely processed, and an itemized receipt is provided. No reimbursement will be made for informal stays at personal residences or other barter or in-kind arrangements.

7. Lodging expenses in excess of the current authorized lodging rates will not be reimbursed unless a prior contracted group rate has been negotiated with the hotel or unless expressly authorized for some other business purpose. This must be confirmed by the submission of a [hotel authorization](#) form listing the room rate, taxes, and dates of stay, with approval from either the traveler's office director or the manager responsible for negotiating the contracted group rate for the event.
8. If an expense report is submitted without the necessary hotel authorization and the lodging rate is in excess of the authorized rate, the expense report will be returned to the traveler for correction, or reimbursement will be made for only the authorized maximum hotel rate.
9. The maximum authorized lodging rate is exclusive of tax; that is, reimbursement will be made up to the maximum rate plus tax. Note, however, that in some cities, including San Francisco and Los Angeles, employees of government agencies are exempt from the transient occupancy tax on hotel stays. Upon check-in, travelers should inform the hotel that they are government employees and fill out an exemption form. Exemption forms are also available from General Services. Hotels will usually ask to see a government-issued identification card. Some hotels also ask for "travel orders" or a travel authorization letter from the agency; General Services can provide these letters.
10. For lodging through Airbnb or similar platforms, the maximum authorized lodging rate is exclusive of tax but is **inclusive** of cleaning fees or other service fees.
11. The State Bar covers the cost of the hotel room and necessary business-related telephone calls, parking, nonpremium Internet charges and business center expenses. These expenses should be itemized on the expense report and not included with the lodging rate. Travelers should use their own wireless devices wherever feasible if more economical than using the hotel's services.
12. Room service, minibar charges in-room movies, and other in-room self-service items, and gratuities for such items as luggage assistance, valet service, or housekeeping service, are not reimbursable expenses. Travelers, may, however, claim a \$5 incidentals per diem to cover the cost of minor personal incidental expenses incurred while on travel status.
13. 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 related

to State Bar business or due to an unavoidable personal emergency.

14. For individuals not on Travel Status, lodging may be reimbursed only if there is a specific business need for the hotel stay, such as staffing the Bar Exam or an offsite meeting at the hotel.

C. MEALS

1. Per Diem Reimbursed Meals for Individuals

- a. Pcards may not be used for any individual meals.
- b. Per diem meal costs will be reimbursed at the authorized per diem meal rate (Appendix A).
- c. Per diem meal costs will be reimbursed based on the following travel status guidelines:
 - Breakfast: Traveling before 7:00 a.m.
 - Lunch: Traveling at 12:30 p.m.
 - Dinner: Traveling after 7:00 p.m.
- d. The meal per diem may not be claimed when a meal is otherwise provided (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.
- f. For individuals not on travel status, meal costs may be reimbursed at the authorized per diem meal rate if the meal was work-related and in conditions beyond the individual's control. Examples include required attendance at an offsite meeting or staffing the bar exam.

2. Catered Meals for Onsite Meetings & Events

- a. Refreshments and meals may be catered at State Bar expense at State Bar onsite 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.
- b. The cost of catering for onsite meetings and events may not exceed the authorized onsite catering rates (Appendix A). Exceptions must be approved

by the Director of General Services at least **five business days** in advance of the onsite meeting/event date.

- c. Onsite catering must be arranged through the meeting and travel staff in the Office of General Services to ensure compliance with policies related to cost, insurance, and building access. Individual employees may not order catering for onsite meetings and events. An exception may be made for meetings of five or fewer people where individual takeout meals are provided in lieu of catering. In such cases, the meeting coordinator must consult with the meeting and travel staff in Office of General Services at least **five business days** in advance of the onsite meeting/event date. Upon approval, the meeting coordinator may purchase the takeout meals, either using their Pcard or seeking reimbursement using an expense report.
- d. Catering may be provided to employees in lieu of their individual per diems in instances where the need to keep the team for a working lunch or other special group project is the most efficient use of time and expense. The total amount of the catering cannot exceed the combined total of the participants' collective per diem amounts, and the manager must ensure that any per diem meals are not claimed on any individual expense reports. Managers may purchase takeout meals for this purpose as described in section (c) above.

3. Alcoholic Beverages

- a. Alcoholic beverages and corkage fees are not reimbursable expenses and may not be charged to Pcards.

D. COMMUNICATIONS AND BUSINESS CENTER EXPENSES

1. While on travel status, 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. Reimbursement is provided for expenses such as offsite photocopying, faxing, or hotel business-center charges, whether or not travel status requirements are met.
2. Any additional roaming services needed to accommodate State Bar communications while an employee is not on travel status (e.g., office communications while on vacation) must be approved and arranged through the Office of General Services in advance of travel.

EXPENSE ADVANCES

- A. State Bar employees who have a Pcard must use it for all travel and business-related expenses whenever feasible, to reduce processing costs and maximize organizational efficiencies. For State Bar employees who do not have a Pcard, it is preferred that they use their personal funds for travel expenses and request reimbursement at the conclusion of the trip.
- B. Travelers may, under specific circumstances, request temporary travel advances by submitting a cash advance request (found in the expenses module in Oracle Fusion) at least three workdays before the requested disbursement date of the travel advance. Travelers are required to comply with the State Bar's [travel advance policy](#). The cash advance request must specify the trip's purpose and duration, and be approved by the traveler's immediate supervisor.
- C. The amount of the advance will be based on the nature and requirements of the trip. Eligible expenses include meal per diem, lodging, and ground transportation. Under no circumstances shall the advanced amount exceed \$250 per day.
- D. All advances are treated as loans, and as such, must be repaid or offset by properly approved expense reports within 10 calendar days after completion of the trip for which they were advanced. It is the responsibility of the traveler to advise the Office of Finance of any circumstances that will prevent timely settlement of the advance. Travelers must submit to the Office of General Services an approved expense report, original issued receipts for all expense items, and reimbursement for any unused funds in settlement of the advance. The Office of General Services will transmit the funds to the Office of Finance with the approved expense report.

OFFSITE MEETINGS AND WEEKEND OR EVENING MEETINGS

- A. Meetings and events should be held onsite at the State Bar's offices in San Francisco and Los Angeles to avoid the cost of offsite meeting room rental fees—and in particular, hotel catering, which is usually significantly more expensive than onsite catering. Meetings should only be held offsite if there is a significant business need to use another venue. Factors to be considered include: (1) the availability of State Bar conference center space; (2) the size of the meeting; (3) unique logistic requirements of the meeting; (4) the cost of offsite meeting space and catering; and (5) the proximity of the proposed offsite location to economical transportation and lodging options. Except as specified in (B) and (C) below, meetings anticipated in offsite venues require written documentation of the business need for an offsite venue and approval of the Director of General Services or the Deputy Executive Director, before the meetings are scheduled and before any outside venues are secured. The Office of General Services will coordinate between the requesting office and the Director of General Services or the Deputy Executive Director to document the business need for and approval of an offsite venue.

- B. A documented business need and advance approval of the Director of General Services or the Deputy Executive Director is not required for bar exam testing sites, or for offsite events held in conjunction with law schools or similar organizations where there is no cost for use of the offsite venue.
- C. Contracts for offsite meeting venues must be initiated by the Office of General Services. This requirement does not apply to the Office of Admissions for bar exam testing sites; subject to the provisions above, Admissions may initiate bar exam site contracts per their established procedures.
- D. Offsite catering costs require separate approval even if approval for an offsite venue is initially granted by the Director of General Services or the Deputy Executive Director.
- E. Onsite meetings should be scheduled for business hours whenever possible to avoid extra charges that may be incurred to provide building services or staff services on evenings and weekends.

Appendix B

Authorized Travel and Catering Rates

(Effective January 1, 2025)

Mileage Reimbursement

Effective January 1, 2025, the personal auto mileage reimbursement rate is \$0.70 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 embedded in the formulas of the online Expense Report and will be adjusted on the effective date of any rate change.

Lodging Reimbursement (excluding all taxes)

The lodging reimbursement rate is the state or federal government rate offered by standard business hotels in reasonable proximity to the office, up to the following maximums:

San Francisco:	\$272
Los Angeles:	\$191

Incidental Expense Per Diem

Incidentals:	\$5
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Individual Employee Travel Meal Per Diem

Breakfast:	\$22
Lunch:	\$23
Dinner:	\$36

Maximum Onsite Catering Cost Per Meal

Breakfast:	\$22*
Lunch:	\$23

Catering costs above the maximum may be approved for small, locally owned businesses in support of the State Bar's equity and inclusion objectives. Advance approval from the Office of General Services is required.

*Catering for breakfast is permitted only for meetings beginning at or before 9:30 a.m.

The State Bar of California EXPENSE REPORT

☐ STAFF ☒ OTHER

APPENDIX A

Submit directly to approver within 30 days of travel. Due to Procurement LA within 60 days.

TRAVELER NAME			TRAVEL WEEK OF
MAILING ADDRESS			E-MAIL
GROUP/COMMITTEE			TELEPHONE
Any other lodging or airfare not shown provided directly by the State Bar?		<input type="checkbox"/> Lodging	<input type="checkbox"/> Airfare

TRIP 1 PURPOSE		TRIP 2 PURPOSE	
LOCATION FROM		LOCATION FROM	
TRAVEL TO		TRAVEL TO	
RETURN TO		RETURN TO	

Enter amounts paid by traveler. Indicate all other travel expense by entering DB for items charged directly to State Bar. Circle any missing receipts.

Travel Expense	MON	TUE	WED	THU	FRI	SAT	SUN	
LODGING								LODGING & INCIDENTALS
INCIDENTALS								
TAXI / SHUTTLE / RIDESHARE 1								TRANSPORT
TAXI / SHUTTLE / RIDESHARE 2								
PUBLIC TRANSIT (BUS/RAIL)								
PARKING (HOTEL/LOT/METER)								
TOLLS (BRIDGE)								
OTHER <i>select from list if needed</i>								
AIR TRAVEL								
AUTO (PERSONAL) <small>miles/70¢</small>		-	-	-	-	-	-	
AUTO (RENTAL)								
AUTO (RENTAL GASOLINE)								
BREAKFAST (travel before 7:00a)								MEALS
LUNCH (travel at 12:30p)								
DINNER (travel after 7:00p)								

Notes

Explain any missing receipts circled above.

Other Claims

Volunteers are not authorized to make purchases or render / engage services for the State Bar.

DATE	Description of claim (only enter items not accounted for above, will add to total).	AMOUNT

Volunteer Travel Policy

TOTAL MISC:

Accounting Distribution

Reimbursement Totals

		TOTAL EXPENSE	
		LESS CASH ADVANCE	
		BALANCE DUE REQUESTOR	
		BALANCE DUE STATE BAR (Check Attached)	
Requestor's Signature: (Print Name & Sign)	Date:	Authorized Signature: (Print Name & Sign)	Date:

For Reimbursement, submit to your State Bar approver with original receipts. Keep a copy for your records.