



## Development and Institute Relations Development Travel Spending Guidelines

These spending guidelines are applicable to all staff within Development and Institute Relations (DIR) as well as other members of the Caltech community (e.g., faculty, students) whose travel is charged against DIR's budget.

DIR **follows** the Caltech Travel Policy for reimbursing expenditures related to development travel (see <https://procurement.caltech.edu/documents/121-travelpolicy.pdf>), except as indicated below.

### Guidelines for Booking Air and Train Tickets:

1. Travelers should book **Economy Class** tickets, unless certain conditions exist and/or approval is granted, as outlined below.
2. Travelers may book **Premium Economy/Economy Comfort/Economy Plus** tickets if:
  - a. The shortest travel segment time is in excess of 5 hours.

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*EXAMPLE: a flight from California to major East Coast cities (New York/DC/Boston) is approximately 6 hours; booking a premium economy class ticket would be allowed.*

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3. Travelers may book **Business Class** tickets if:
  - a. Approval has been granted by the Vice President for DIR; or
  - b. Traveler has a written medical justification and approval has been granted by the Vice President for DIR; or
  - c. Traveler is traveling with Caltech's president, who is allowed to fly business class and approval has been granted by the Vice President for DIR; or

- d. Travel is outside of North America *and* the total scheduled travel time, including connecting legs, is in excess of eight hours (*note*: approval is not required).

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*EXAMPLE: a flight from California to major East Coast cities (New York/DC/Boston) is within North America and less than 8 hours; booking a business class ticket would not be allowed (unless approved by the VP for DIR).*

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4. Travelers may book **First Class** tickets if:
  - a. Approval has been granted by the Vice President for DIR; or
  - b. Traveler has a written medical justification and approval has been granted by the Vice President for DIR.

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*EXAMPLE: a flight from California to Hong Kong is outside of North America and more than 8 hours; booking a first class ticket is not allowed unless approved by the VP for DIR. However, traveler may book a business class ticket without approval.*

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5. DIR will pay for certain **ancillary fees**, including convenient or early boarding, extended legroom, preferred seat location, baggage fees, in-flight meals, and in-flight Wi-Fi service. Expenditures for these fees must be reasonable and prudent and must be properly documented.
6. Global Entry and TSA PreCheck fees are not reimbursable.
7. Tickets or upgrades purchased with frequent flyer miles are not reimbursable.
8. Students must travel economy class regardless of duration or length of the flight time.

Additional Travel Guidelines:

1. **Per Diem vs. Meals Actual:** Travelers may be reimbursed for per diem or meals actual, but not both on the same trip. Most DIR travel includes business meals, so being reimbursed for meals actual is generally the appropriate method. Return tickets and meals during travel will still be covered by DIR.
2. **Combining Business and Personal Travel:** Travelers may choose to combine business and personal travel during their trips; however, expenses incurred (e.g. hotel, meals) beyond the business portion of the trip is the sole responsibility of the traveler and will not be covered by DIR.

For any questions, please refer to the Caltech travel policy <https://procurement.caltech.edu/documents/121-travelpolicy.pdf> or contact Wendy Sloom, Director of Finance & Facilities, at 626-395-6228 or by email at [wsloom@caltech.edu](mailto:wsloom@caltech.edu).

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