

Westfield State University

Policy concerning:

APPROVED: October 1999

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TRAVEL

PURPOSE

To define the Westfield State University guidelines to be undertaken when University related travel expenses are incurred. To provide guidance regarding reimbursable travel related expenses.

POLICY

All travel by University employees and/or students is to be funded according to Commonwealth of Massachusetts (state) laws and regulations, University policies and procedures, and the applicable collective bargaining agreements. The traveler is responsible for ensuring adherence to applicable travel policies and procedures. All travel is contingent on available funds.

GUIDELINES

1. All travel funds will be allocated by the Vice President for Administration & Finance to the appropriate department cost center under the approval of the area Vice President on an annual basis. Departmental travel expenses are limited to and shall not exceed the amount budgeted and allocated.
2. In determining the use of travel funds, departmental and administrative area supervisors and Vice Presidents shall consider the extent to which participating in the travel or activity requested will primarily benefit the University.
3. Reimbursements for travel related expenses must follow all University policies and procedures, state laws and regulations, and the applicable collective bargaining agreements regardless of the source of funds. Travel procedures and forms can be found on myWestfield > Documents > Administration and Finance > Travel Information.
4. Prior to any travel, funds must be pre-approved and encumbered on a Request to Travel Form using the travel procedures.
5. The University shall not reimburse any expenses for persons accompanying an employee on a trip (i.e. spouse, child, guest, pet, etc.).
6. Student travel is restricted to students registered with the University and must be approved in advance by the President or a Vice President. Such travel must contribute directly to the student's education or benefit the University. (See Student Travel Policy)

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7. When combining University business with personal travel, the University will reimburse the business portion of a trip that is combined with personal travel. Documentation must be provided to support the business portion of the trip in addition to a detailed allocation of the expenses that are business related. The traveler should obtain a quote at the time of booking to document the incremental cost that is a personal expense and include it with the Request to Travel Form. Reimbursement will be at the lesser of actual paid or would have paid had the travel not been combined with personal travel.
8. The University may reimburse for expenses for non-personal travel before and after business activity, such as hotels and meals, at the discretion and approval of the Department Head Signature Authority and the Director, Procurement & Administrative Services.
9. In accordance with the Massachusetts Conflict of Interest Law (G.L. c.268A), employees are prohibited from earning personal frequent flier miles, hotel rewards, and other rewards or points during state or university funded travel.

TRAVEL ARRANGEMENTS

All University travel shall be arranged through the Campus Travel Manager to include, but not limited to airfare, hotels, car rentals and conference registrations.

NON-REIMBURSABLE EXPENSES

Expenses of a personal nature, unreasonable or excessive expenditures, and those not specifically related to the conduct of University business are not reimbursable. Types of expenses that will not be reimbursed include, but are not limited to:

1. Alcohol; *
2. Excessive or extravagant costs (e.g. exclusive restaurants and hotels);
3. Personal entertainment;
4. Travel insurance;
5. Traffic, toll, or parking violations;
6. Insurance for a personally owned or rental car;
7. Articles stolen from a personal or rental car;
8. Briefcase and luggage purchases;

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9. First class airline tickets;
10. Expenses incurred in connection with personal business or activities;
11. The University shall not reimburse any expenses for persons accompanying an employee on a trip (i.e. spouse, child, guest, pets, etc.);
12. Non-business related conference activities such as tours or tickets to local attractions;
13. Hotel amenities (i.e. phone calls, in room movies, room service, spa/fitness fees, etc.);
14. Charges caused by failure to cancel guaranteed reservations; and
15. Any unexplained expenses.

* Alcohol is an allowable, reimbursable expense when traveling for business purposes for the benefit of the University, providing the expense is incurred in the recruitment of employees, donor cultivation, or other comparable activities. Only the President, Vice President for Institutional Advancement and Major Gift Officers are authorized to purchase or seek reimbursement for alcohol. The preferred method of payment is with the procurement card (P-Card), but reimbursement of expenses incurred on a personal credit card is also allowable. Refer to the University Business Expense Policy (0300) and the Procurement Card and Use Policy (0560).

PRESIDENT'S TRAVEL AND RELATED EXPENDITURES

The Board recognizes the duties of the President require that he/she travel. All official travel should be prudently planned so the best interests of the University are served at the most reasonable cost. This may include economy plus seats and direct routes to forgo unreasonable layovers that would not be an efficient use of time. When traveling, the President will be reimbursed for meals using the US General Services Administration (GSA) per diem rates for breakfast, lunch, and dinner based on geographic distance.

The following internal controls are in place:

1. The Board of Trustees, through the Chair or designee (Chair of Finance Committee), will review and approve all travel requests and related expenditures for the President prior to the approval of the Vice President of Administration and Finance.
2. The Presidents approved blanket in-state request to travel can be used for overnight accommodations, in-state, that includes the benefit to the University.
3. The President is directed to submit a report for Travel and Related Expenditures to the Chair of the Board or designee no less than once every semester.

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REPORTING

The Vice President of Administration & Finance will submit to the Chair of the Board of Trustees by July 31 (for the period from January 1 to June 30) and by January 31 (for the period from July 1 to December 31) of each year a matrix summary of the travel of the President, all Vice Presidents and all direct reports to the President. This summary shall include the following information for each trip: the dates, duration, University purpose, location, and the cost of airfare, lodging and all other expenses and the total cost.

TRAINING

The Finance Division will offer in person and virtual training programs in complying with all travel related policies. These training sessions will be offered at least once annually. Travelers should contact the Finance Division with any questions about travel and related policies.

ENFORCEMENT

This policy applies uniformly to all University employees. The Vice President for Administration & Finance will be responsible for consistently enforcing all travel policies, P-Card policies, and any related policies. Failure to comply with all University policies and procedures may result in disciplinary action up to and including suspension and/or termination.

EXCEPTIONS

Exceptions to this travel policy may be limited but nevertheless may be necessary in unanticipated or very unusual circumstances. All exceptions must be reasonable, both as to arrangements and amounts, and must be approved by the Department Head Signature Authority and the Director, Procurement & Administrative Services. Once the decision has been rendered it is considered final.

REVIEW

This policy will be reviewed annually by the Vice President for Administration & Finance and the Finance & Capital Assets Committee of the Board of Trustees.