

Doc. T92-031 (Appendix B)
Passed by the BoT
6/3/92
Revised 2/1/95
Revised 6/7/95
Revised 2/5/97, Amendment # 3

TRAVEL POLICY

(Effective Date: January 31, 1997)

EXECUTIVE SUMMARY

I. BACKGROUND

The travel policy has been streamlined as a result of an administrative redesign project that reviewed the process for approval, control, and accounting for travel related transactions for employees and Trustees on University business. The objectives of the redesigned travel policy include improved services to travelers by streamlining the procedures and reducing the documentation burden on the traveler; significantly reducing the reimbursement time to the traveler; and reducing the costly administrative staff time in processing travel transactions.

II. PURPOSE

To provide a uniform policy regarding approval and control of travel by employees and Trustees on University business, and to establish guidelines for the management of travel expenditures.

III. APPLICATION

This policy applies to all campuses and the central administration of the University of Massachusetts.

IV. DELEGATION

The Board of Trustees has assigned to the President and Chancellor of each campus general responsibility for the approval and control of travel by employees, and the President and each Chancellor shall establish written procedures to implement this policy and may, at their discretion, establish travel procedures more stringent where appropriate.

V. RELATED ITEMS

Applicable laws, state and federal audit guidelines, and terms and conditions imposed by grantors and donors.

VI. VOTES RESCINDED

DOC: T92-031 Policy for Management of University Funds, Appendix B is replaced by Doc. T92-031, Appendix B, Amendment #3.

TRAVEL POLICY

I. PURPOSE

- A. To ensure compliance with applicable state and federal laws.
- B. To establish guidelines for the approval, control and accounting for employee and Trustee travel on University business.
- C. To ensure fairness for both the traveler and the University.

II. SCOPE

This policy pertains to all employee and Trustee travel expenditures by University of Massachusetts employees or Trustees on University business, regardless of source of funds.

Travel expenses for non-university employees, such as consultants, speakers, lecturers, visiting professors, candidates for positions, and students are reimbursed in accordance with contract for services and vendor payment procedures.

III. RESPONSIBILITY

The Board of Trustees has fiduciary responsibility for the expenditure of all funds under the control of the University of Massachusetts. The Board of Trustees hereby assigns to the Chancellor of each campus general responsibility for the management and control of employee travel expenditures. Responsibility for employee and Trustee travel managed by the President's Office or University Central Administrative Services is assigned to the President, and all references to the Chancellors shall be deemed to include the President as regards such employee travel expenditures. The President shall formulate guidelines to be followed by the campuses in implementing this policy. At their discretion, University campuses and departments may impose more restrictive guidelines for budgetary or control reasons.

It is the responsibility of the Chancellor to implement and administer the provisions of this policy in all areas under his or her jurisdiction. At a minimum, the Chancellor shall:

- Inform all members of the faculty and administration of their obligations for all employee and Trustee travel expenditures under the control of their respective departments or units.
- Issue written instructions relating to the approval and control of employee travel expenditures.
- Establish approval and documentation requirements and allowable cost rules for travel, hotel, and food expenditures.
- Designate the campus officer responsible for the control of employee travel expenditures.
- The President shall issue instructions regarding Trustee travel and designate an officer responsible for coordinating the same.