

Westfield State University

Policy concerning:

APPROVED: October 1999

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REVIEWED	April 2025

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 ("University Traveler(s)") is to be funded according to Commonwealth of Massachusetts 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 on an annual basis by the Vice President of Administration and Finance to the appropriate department cost center under the approval of the Division Vice President. 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 Division 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, Commonwealth laws and regulations, and the applicable collective bargaining agreements regardless of the source of funds. Travel procedures ("Travel Procedures") and forms can be found on myWestfield > Documents & Policies > Administration and Finance > Travel Information.
4. Prior to any travel, 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 non-University 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 Division Vice President. Such travel must contribute directly to the student's education or benefit the University (refer to the Student Travel Policy (4040)).
7. When combining University business with personal travel, the University will reimburse the University business portion of a trip that is combined with personal travel. Documentation must be provided to support the University business portion of the trip in

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addition to a detailed allocation of the expenses that are University business related. The traveler should obtain a quote at the time of booking to document the personal expense incremental cost and include it with the Request to Travel Form. Reimbursement will be at the lesser of actual paid or would have paid had the University travel not been combined with personal travel.

8. The University may reimburse for expenses for non-personal travel before and after University business activity, such as hotels and meals, at the discretion and approval of the Department Head Signature Authority and the Director of Procurement and Administrative Services.
9. In accordance with the Massachusetts Conflict of Interest Law (G.L. c.268A), University Travelers are prohibited from earning personal frequent flier miles, hotel rewards, and other rewards or points during state or University funded travel.

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;
9. First class airline tickets;
10. Expenses incurred in connection with personal business or activities;
11. The University shall not reimburse any expenses for non-University approved 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;

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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 and Institutional Advancement staff, as authorized by the Vice President of Institutional Advancement, are permitted 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 the Financial Affairs Committee), will review and approve all travel requests for the President prior to the approval of the Vice President of Administration and Finance. The Vice President of Administration and Finance will approve all related travel expenditures against the President's pre-approved travel request.
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.

REPORTING

The Vice President of Administration and Finance will submit a biannual summary to the Financial Affairs Committee of all travel expenses incurred by the President and all direct reports to the President. The first summary will be provided in February for travel from July through December. A second summary will be provided in October for travel from July through June. The summary shall include the following information for each trip: dates, duration, University purpose, location, and the cost of airfare, lodging, all other expenses and the total cost of travel.

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TRAVEL ARRANGEMENTS AND TRAINING

All University travel shall be arranged through the University's Travel Manager or through the University's designated travel agency. This includes but is not limited to airfare, hotels, car rentals, conference registrations, etc.

The Travel Manager will provide training on all travel related policies and procedures, upon request. Travelers should contact the Travel Manager with any questions about travel, related policies and procedures.

ENFORCEMENT

This Policy applies uniformly to all University Travelers. The Vice President of Administration and 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 the 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 of Procurement and Administrative Services. Once the decision has been rendered it is considered final.

REVIEW

This policy will be reviewed as needed by the Vice President of Administration and Finance and the Financial Affairs Committee of the Board of Trustees.