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DATE: November 1, 2018

TO: All Full-Time and Priority Adjunct
AAUP Bargaining Unit Members

FROM: Dr. James Ottavio Castagnera

RE: AY 2018 – 2019 Faculty Travel Reimbursement Fund

This memo sets forth the new policy for reimbursement of professional travel expenses through the Faculty Travel Fund, as required by Article XXXI, Section G (I) of the 2017-2020 Agreement and the Memorandum of Understanding entered between the University and the AAUP in October.

Over the next two years, the administration will provide a total of up to \$500,000 in travel funds with an anticipated cap of \$250,000/year. During the 2018-2019 academic year, individual bargaining unit members may receive up to \$1,250 in travel expense reimbursement. If the total amount spent in the first year exceeds \$250,000, the available fund for 2019-2020 will be decreased by the amount of the overage, and, if necessary, the individual allotment will be reduced to reflect the aggregate amount available. If less than \$250,000 is spent in the first year, the underage will be added to \$250,000 in the second year. Individual funds available in the second year will be calculated at the end of the second year based upon the total amount available and the number of faculty who travel. In the second year, all faculty will be reimbursed after the close of the fiscal year.

As in the past, only faculty and professional athletic staff who are actively participating in conferences, seminars, workshops, clinics, and master classes are eligible for travel reimbursement. The definition of actively participating remains the same as in the past. Bargaining unit members are required to submit an application for utilization of the travel funds to his/her department chairperson or the Athletic Director in the case of members of the Professional Athletic Staff. Such applications must include an announcement of the event and evidence of the member's actual participation; a signed Assumption of Risk form, and an estimated budget. The chair or Athletic Director will determine that the request meets these three requirements and then forward the application to the Provost's Office.

1. **Initial Submission of Forms** – Before traveling, faculty must provide proof of acceptance/participation, an itemized budget, and a signed Assumption of Risk form to their department chair. The chair will forward the three documents to Laura Hoffman (lhoffman@rider.edu) in an email if they agree that the proposal meets the travel fund guidelines.
2. **Final Request for Reimbursement** - Upon completion of the travel activity, complete an official Travel Expense Reimbursement with all original, itemized receipts to the Provost's Office along with a copy of the meeting program or other documentation containing proof of your participation. Your reimbursement cannot be processed without all of this information.
3. **Original Itemized Receipts** – Disbursements requires that original itemized receipts accompany each travel request as mandated by the federal government. Where original receipts are not available, documentation must be made as to why original receipts are not included. The Provost's Office reserves the right to deny travel requests that do not include original, itemized receipts. Please see below for clarification on what constitutes an acceptable receipt:
 - For meal receipts, the itemized meal receipt is required as well as the credit card meal receipt – this includes meals charged to hotel rooms.

- Every attempt must be made to include all original receipts. If a meal receipt is missing, you must list the name of the restaurant, the date, and what was ordered, along with the itemized costs and total spent.
- You must submit an itemized hotel receipt from the hotel – not the electronic payment confirmation from a website reservation payment.
- Credit card statements are not acceptable as receipts unless submitted as secondary documentation.

When traveling overseas, please convert your claim to US dollars on each receipt and provide the conversion rate you use. If your receipt is in a foreign language, please note what each receipt is for. My office cannot be responsible for making this conversion or translation for you and your travel reimbursement form will be returned to you for correction.

4. **Meaning of "Participation in the Program"** - Reimbursement of up to \$1,250 is available subject to participation at professional meetings. If you have any doubt, after reviewing the Agreement's language, of what is and is not considered participation, it might be wise to confer with Jeff Halpern or me in advance.

Participation includes the following:

- presenting a paper or talk at a professional meeting;
- acting as a panel discussant or panel chair; or
- holding an office in the host organization and participating as such at the organization's conference.
- If you are in the arts, performing at an event or conducting a master class.
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****STIPEND NOTE:** If you are being paid for your presentation, performance or master class and/or your expenses are being covered by the host organization, this must be reported with your reimbursement claims. By mutual agreement with the AAUP, the fund will cover your round-trip airfare or similar transportation expense, regardless of other payments, unless the host organization is paying those transportation costs. However, the compensation or expenses paid by the host organization will be deducted from your other reimbursement claims.

5. **Reimbursement Policies** - The \$1,250 reimbursement can be used for any number of qualified meetings until your \$1,250 limit is reached.
6. **Meals** - The University will reimburse for reasonable expenses for meals. However, it is the general policy and practice of the University **not to reimburse for alcoholic beverages**. Original itemized meal receipts must be provided for each meal for which you seek reimbursement.
7. **Per Diem Rate for Lodging** - Ordinarily, hotel room rates will be set by the hotel at the conference site. The full cost for staying at the conference hotel will be paid (within the limits of the \$1,250 initial reimbursement). Documentation should indicate the designated conference hotel(s). If no hotel is provided at the conference site or if a faculty member must stay in hotels en route to or from the site, the maximum reimbursement will be \$75 per day. The University will provide reimbursement at the single rate or at one half of the double rate if the room is shared.
8. **Courtesy Gifts for Friends (for meals or lodging)** - If friends, relatives, or associates provide meals or lodging for traveling faculty members, the University will reimburse a faculty member a maximum of \$20 for gifts or entertainment offered in return for each day of meals or lodging, provided \$20 per day does not exceed the cost of the relevant meals and/or lodging. The name and address of the host must be provided. If a host or host's household provides meal(s) or lodging for

more than one faculty member at a time, \$20 per day remains the maximum reimbursement for the entire group of faculty members.

9. **Membership Fees** - The University will not ordinarily pay organizational membership fees. However, if registration or hotel rates are reduced by paying such fees so that the total cost of membership and registration or membership and lodging is less than either registration or lodging would otherwise have been, then the University will reimburse the membership fee.
10. **Car Rentals and Mileage** - The University will pay car rentals for extra days (beyond the minimum period necessary to travel to the relevant meeting) only if the total fee is lower than the rental fee would have been for the minimum period. The use of personal vehicles will be reimbursed at the prevailing Internal Revenue Service approved rate (currently .545 per mile.). Roundtrip commuting mileage from your home to Rider must be subtracted from each day of mileage you are submitting for reimbursement.
11. **Use of Limousines or Other Hired Cars in lieu of Personal Automobiles** - When a car/van service is used in lieu of public transportation or personal automobile, the costs may be charged to the maximum of the lowest cost alternative transportation. Documentation must include computation of the lowest cost alternative transportation.
12. **Other Transportation Costs** - The lowest available rate will be paid for transportation. At present the University uses World Travel, Inc. for its business travel. We suggest that faculty members contact this agency first to obtain the lowest rates. If faculty members are able to obtain lower rates elsewhere, another agent may be used.
13. **Use of the Faculty Travel Fund during Research Leaves, Research Trips, or Vacation Trips** - The Fund is available to faculty members under the same conditions while on research leave, or on research and vacation trips. The Fund can be used to cover relevant costs of travel to the site of the leave or trip (up to full reimbursement) if the faculty member participates at a meeting at the site of the leave or trip. Faculty members will be reimbursed for travel from a leave/research/vacation site to a professional meeting by calculating travel costs from home to the meeting or from the leave/research/vacation site to the meeting, whichever is less.
14. **Payment of Costs for Publication or Proceedings** - The fund does not provide reimbursement for costs incurred for the printing, duplication, or publication of research.
15. **Deadlines for Submission of Travel Reports** - All post-travel reimbursement requests should be submitted to the Provost's Office no later than four weeks after the faculty member returns from the relevant trip. By July 10, 2019, all reimbursement requests for the current fiscal year will be due in the Provost's Office.
16. **Reimbursement from Other Budgets** - Faculty who receive supplementary travel support from grants or from budgets other than the Travel Expense Reimbursement Fund or who receive honoraria from the host organization must inform the Provost's Office staff before applying for reimbursement from the Travel Fund.

If you have any questions, please contact Laura Hoffman at (609) 896-5010 or via email at lhoffman@rider.edu.