

Library Policy on Travel Funds

Purpose of the Policy

This policy adheres to University regulations on travel and reimbursement (University regulations 6.1.10), and provides guidelines to staff and librarians of the Rutgers University Libraries related to the conditions under which funds for travel and related expenses may be requested and reimbursed by the Libraries. Those receiving funds may be requested to prepare a report or dissemination plan related to the results of their travel.

Administration of Travel Funds

Travel funds will be allocated to each library unit and approved by the Library Director or Associate University Librarian except for Library Directors' and Associate University Librarians' travel, and travel for heads of units reporting directly to the University Librarian, which will continue to be centrally budgeted and administered. Recruitment travel will also be centrally budgeted and administered. Actual processing of travel reimbursement forms will be done centrally after approval by the Library Director or Associate University Librarian.

Application For Travel Funds

1. Application for travel funds should be made in advance to your Library Director or Associate University Librarian. **REIMBURSEMENT IS NOT GUARANTEED UNLESS PRIOR APPROVAL IS RECEIVED.**
2. Librarians and staff applying for travel funds are responsible for providing coverage to meet professional obligations to the unit and to colleagues in their absence.
3. Only librarians and staff paid from accounts under the control of the University Librarian are eligible.

Types of Travel

There are seven types of travel under which you may apply. Librarians are permitted to combine faculty and other travel.

The Library Directors and Associate University Librarians will be responsible for administering and approving faculty, staff, and other travel for members of their unit whose travel will be reimbursed from the unit's allocation. Support of system-wide travel will come from the central travel budget and be recommended by an Associate University Librarian, Director or other Administrator and approved by the University Librarian.

Approved travel expenses, including registration fees, meals, lodging and transportation (reimbursed based upon full cost of transportation by the most economical means) must be supported by appropriate receipts, and adhere to the University's Travel Policy (University Regulations & Procedures Manual, Section 6.1.10).

I. Faculty Travel – Fiscal Year

1. \$400 will be credited to each tenured Librarian (academic and calendar year).
2. \$600 will be credited to each non-tenured Librarian II, Librarian III or IV (academic and calendar year appointments).
3. Part-time librarians, Librarian V's, GAs and TAs, do not receive allocations but are eligible for all other types of travel funds.
4. Terminal year librarians or those serving temporary appointments as Lecturers are excluded from the above allocations but may apply for other types of travel funds.
5. A librarian (tenured or non-tenured) who depletes his/her allocation will still be eligible for campus, and other travel. Travel qualifying under these categories will not be deducted from the faculty allocation.
6. Librarian on Sabbatical Leaves or other leaves of absence do not receive faculty travel allocation for the period of the leave.

II. Travel for Staff

These funds will be used for conferences, workshops, job training and development for all staff personnel. Each request will be considered on an ad hoc basis. When planning staff travel, it is important to obtain clearance from supervisors and to alert colleagues in advance of the travel day(s).

III. Campus Travel: Librarians and Staff

Travel reimbursement requests on the standard University expense report form should be submitted to the Libraries' Budget Office after approval by the Library Director or Associate University Librarian. Please indicate your campus mailing address on the form. Funds will be used for travel between Newark/Camden/New Brunswick for the following purposes:

1. Internal library meetings: e.g. Library Faculty, A&P Committee, Staff Development, etc.
2. Workshops or seminars sponsored by RUL or the University, relating to job training, staff development, etc.

IV. Other Travel

Individual librarians elected or appointed to state, regional and national office in library or related professional associations or serving as committee chairs or invitational speakers, who incur travel expenses as a result of such participation, may request other travel funds. Library Directors and Associate University Librarians will follow the guidelines expressed in Paragraphs A through D of the Faculty Travel Policy adopted at the RUL Faculty meeting of March 2, 2007. A copy of the invitation or appointment and meeting schedule should accompany the request. Due to budget restrictions individual librarians are encouraged to discuss possible commitments with Library Director or Associate University Librarian as far as possible in advance. Simply incurring the expense cannot automatically guarantee approval or reimbursement. Please Note that this category does not include support for travel involving committee membership.

Other travel may be approved by the Library Director or Associate University Librarians from the unit's funds when the faculty allocation has been depleted for an individual, but it is deemed necessary for the individual to attend a professional meeting.

V. System-Wide Travel

Only travel required to support the goals and objectives of the Libraries and at the request of the University Librarian or an Associate University Librarian, will be fully reimbursed. For system-wide responsibilities or for travel at the request of an Associate University Librarian or the University Librarian, a travel application, signed by the Associate University Librarian, should be directed to the Libraries' Budget Office for processing. All requests exceeding \$1,000 for a single individual or for sending multiple individuals to a single conference/program must be approved by the University Librarian. Note that not all travel by administrators is automatically considered "system-wide travel."

VI. Travel Under Sponsored Programs

Specific procedures for travel related to sponsored programs are outlined in the *Policies and Procedures for Travel and Business Expense Reimbursement on Grants and Contracts* and are issued by the Division of Grant and Contract Accounting (DGCA). The DGCA website can be found at <http://postaward.rutgers.edu/>.

Travel and Business Expense Report (TABER) forms should be completed according to the above policies, signed by appropriate "approver" for the grant, and sent to the Libraries' Budget office for processing. An "Application for Travel Funds" form does not need to be completed.

VII. Travel Supported from Unit i.e. State Operating, Gift, Endowment or Auxiliary Accounts

For reimbursement of travel expenses supported directly by Unit Library accounts, including gift funds, please follow your internal Unit Library procedures, adhering to the

University Travel Policies. Travel and Business Expense Report (TABER) forms should be completed, signed by appropriate “approver”, and sent to the Libraries’ Budget office for processing. An “Application for Travel Funds” form does not need to be completed. If reimbursement is split between Unit Library account and Unit travel allocation, both the “Application for Travel Funds” form and the TABER must be submitted to the Libraries’ Budget Office.

Procedures For Obtaining Travel Reimbursement

In all cases except Campus Travel (Section III), Sponsored Programs (Section VI) and Unit Funds (Section VII) an approved travel application form must be on file in the Library Director’s or Associate University Librarian’s office and the Libraries’ Budget Office prior to the actual travel. The Libraries’ Policy on Travel Funds is in addition to the University Travel Policy and Procedures. Please see University Regulations Section 6.1.10 for details.

Travel Advances: Travel advances can be requested for transportation, meals, and incidentals when needed. Travel advances are considered a personal charge to the individual requesting the advance and requests of more than \$100 per day requires a justification letter be submitted along with the Employee Travel Advance form. The Employee Travel Advance form should be sent to the Libraries’ Budget Office with the approved Application for Travel Funds form no less than 3 weeks before the desired travel in order to be processed. Please refer to University Regulations & Procedures Manual, Section 6.1.10, Page 4 for detailed information regarding Travel Advances.

Other “advances” may be requested following these university regulations, such as a check request for registrations or direct billing for air or rail travel, only when the full amount of the item is being reimbursed by the Libraries. In these cases, the requests must be made to the Libraries’ Budget Office no less than 3 weeks before the date of travel.

Travel and Business Expense Reports (TABER): These reports should be completed within 30 days after your return. They **MUST** be submitted within 60 days after your return or reimbursement is not guaranteed (including campus travel). Employees should itemize all

expenses on the form and attach original detailed receipts for all expenses. Please note that university regulations specify that receipts for actual meal expenses must itemize expenses; a credit card receipt alone is not acceptable. For reimbursement of airline ticket purchases, the airline ticket receipt and all boarding passes must be submitted with the TABER. Expenses will not be reimbursed if receipts (or a copy of your cancelled check) are not included as mentioned above. Please use your campus mailing address on the expense report form.

Itemize all of your expenses even though you are not requesting reimbursement for the total amount.

The “Requestor’s Signature” Line on the Travel and Business Expense Report Form should be signed by the applicant. The Library Director or Associate University Librarian must initial “Certified Correct” line or the form will be returned. A copy of the signed approval form must be enclosed for all travel other than campus travel. The forms should be forwarded for processing to:

Libraries’ Budget Office
University Library Administration
Alexander Library
CAC

NOTE: Under no circumstances may an individual approve his or her own TABER. The traveler’s supervisor or the supervisor’s designee who does not report to the traveler must approve the TABER. This means that all TABERs for Unit Directors and Associate University Librarians, regardless of the source of funds, must be forwarded to the Libraries’ Budget Office for approval.

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