

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. 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. 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. Library Directors' and Associate University Librarians' travel will be separately budgeted and administered. 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 by request to the appropriate Library Director or Associate University Librarian. **REIMBURSEMENT IS NOT GUARANTEED UNLESS PRIOR APPROVAL IS RECEIVED.**
2. Only librarians and staff paid from State accounts under the control of the University Librarian are eligible to receive travel funding under this policy.
3. RU faculty and staff travelers to international destinations **MUST** register through the online Faculty and Staff International Travel Registration <https://travelregistration.rutgers.edu/> The

complete International Travel Policy found at <http://riskmanagement.rutgers.edu/facstaff.html#International> should be reviewed prior to travel.

Types of Travel

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

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).

NOTE: Travel Types I, II, & III are charged to Unit/Library travel allocation funds and require fully executed "Application for Unit/Library Travel Funds" form.

I. Faculty Allocation Travel – Fiscal Year

1. A specified amount will be credited to each tenured Librarian (academic and calendar year) annually (amount will be reviewed and determined annually).
2. A specified amount will be credited to each non-tenured Librarian II, Librarian III or IV (academic and calendar year appointments) annually (amount will be reviewed and determined annually).
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 other travel.

II. Other Faculty Travel

Upon exhaustion of tenured or non-tenured allocation, a faculty member may apply for other travel funds. 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 or participating in any other professional development opportunity, who will incur travel expenses as a result of such participation, may request other travel funds. Any document supporting or explaining the rationale for attendance should accompany the request. Due to budget limitations individual librarians are encouraged to discuss possible commitments with Library Director or Associate University Librarian as far as possible in advance.

III. Staff Travel

A pool of funds will be set aside annually for staff travel. 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).

NOTE: Travel Types IV, V & VI are NOT charged to Unit/Library travel allocation funds and DO NOT require “Application for Unit/Library Travel Funds” form.

IV. 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 and will be funded/reimbursed centrally for the following purposes:

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

V. 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.

VI. 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

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 for Travel Types - I. Faculty Allocation Travel; II. Other Faculty Travel; and III. Staff 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 return from travel. The TABER **MUST** be submitted within 60 days after your return to ensure reimbursement. This includes submissions for campus travel reimbursement. 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. Expenses will not be

reimbursed if receipts (or a copy of a relevant cancelled check) are not included as mentioned above. The traveler should indicate his/her campus mailing address on the expense report form. All expenses should be itemized even if reimbursement is requested for less than 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. 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.

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