



Board of Governors Rule

Finance and Administration

Travel

Responsible Unit: Strategic Initiatives/
Procurement, Contracting & Payment Services

Adopted: June 21, 2019

Effective: October 1, 2019

Revision History: Prior BOG Policy

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amended June 6, 2003)

Review Date: April 2024

BOG FINANCE AND ADMINISTRATION RULE 5.8 TRAVEL

SECTION 1: PURPOSE & SCOPE.

- 1.1 The University seeks to design and administer a travel program that promotes safe and economical University travel while ensuring accountability and appropriate use of funds.
- 1.2 This Rule pertains to the management of business travel, hereinafter referred to as “Travel,” and reimbursement of expenses to Employees; members of the West Virginia University Board of Governors; and other non-employees traveling on behalf of West Virginia University, including West Virginia University Institute of Technology and West Virginia University Potomac State College (collectively the “University”).
- 1.3 Consultants and contractors may be required to follow this Rule and other University regulations, at the University's option. All consultant and contractor travel subject to this Rule shall be addressed as part of the consulting/contractual agreement.
- 1.4 When under the terms and conditions of a grant or contract, if reimbursement rules and regulations for travel expenses differ from those contained in this Rule, the reimbursement shall be governed by the rules identified in the grant or contract.

SECTION 2: OVERVIEW OF RESPONSIBILITIES OF THE TRAVEL PROGRAM.

- 2.1 The President is delegated the authority to manage, approve or disapprove travel and travel related expenses. Exceptions to this Rule must be approved by the President.
- 2.2 University Travel Manual.
 - 2.2.1 The President will develop a Travel Manual, consistent with this Rule, to provide additional, detailed guidance to Employees and others traveling on behalf of the University.

- 2.2.2 The University Travel Manual will set the internal control structure for the program, detail allowable and unallowable expenses and identify the processes to be followed when booking and expensing travel.
 - 2.2.3 The President shall analyze emerging trends and changing circumstances that impact travel to keep the travel program consistent with best practices. Approval will be obtained from the Board prior to implementing any change that would make fundamental, systemic changes to the overall travel program.
- 2.3 Traveler responsibility.
- 2.3.1 Travelers are responsible for the timely and accurate submission of expense reports within the University's expense management system. The submission must include a documented business purpose, as well as all required receipt documentation specified in the University Travel Manual.
 - 2.3.2 Personal Expenses incurred during travel are the sole responsibility of the Traveler and will not be reimbursed. Personal Expenses include expenses incurred by a spouse/partner and/or guest traveling in a personal capacity. The University will not reimburse for Personal Expenses nor should such expenses be charged to the University and then later reimbursed to the University by the individual.
- 2.4 Approval of expenses.
- 2.4.1 The Traveler's expense report shall be approved by a supervisor and/or the grant owner, as well as any designated business office.
 - 2.4.2 This approval means that the expense report meets all criteria established by this Rule.
- 2.5 Corrective actions for violations.
- 2.5.1 Any University Employee who fails to abide by the requirements within this Rule shall be subject to appropriate disciplinary action, including warning, suspension, termination, or other disciplinary action as may be appropriate.
 - 2.5.2 Furthermore, although conduct may not violate this Rule, it may still be prohibited by the University under a different rule, policy, or standard of behavior. Accordingly, in such cases, the University reserves the ability to take any necessary action.
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SECTION 3: TRAVEL AUTHORIZATION AND USE OF THE UNIVERSITY'S TRAVEL MANAGEMENT COMPANY.

- 3.1 All Travel funded by the University shall be approved, in accordance with the University Travel Manual.
 - 3.2 Travel may be authorized only for official University business and sufficient and appropriate financial resources must exist to pay for the travel expenses.
 - 3.3 All international Travel must be approved in advance through the process designated by the Office of Global Affairs and the Office of Export Control.
 - 3.4 All Travelers are strongly encouraged to make Travel reservations through the University's contracted Travel Management Company unless otherwise provided for in the University Travel Manual.
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SECTION 4: AIR TRAVEL.

- 4.1 Commercial airlines.
 - 4.1.1 Travelers shall choose the lowest logical airfare available or in accordance with any University airline contracts unless there is a legitimate business circumstance or medical condition that requires booking a flight above the best value airfare.
 - 4.1.2 Travelers are strongly encouraged to make advance bookings through the University's contracted Travel Management Company.
 - 4.1.3 Travelers may not specify a particular airline to accumulate mileage or promotional plans if it results in a higher airfare.
 - 4.1.4 Fees due to Traveler's negligence or personal preferences will be considered a Personal Expense to the Traveler.
 - 4.1.5 Reservations must be made in accordance with the University Travel Manual. Travelers must submit all requirement documentation specified in the University Travel Manual with their expense reports.
 - 4.1.6 Miscellaneous air travel related expenses deemed allowable in the University Travel Manual are permitted.
- 4.2 Use of chartered aircraft service.

- 4.2.1 Chartered aircraft service may be used if approved in advance, in accordance with the University Travel Manual.
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SECTION 5: GROUND TRANSPORTATION.

- 5.1 Travelers are to use the most economical and practical means of transportation.
- 5.2 When operating a vehicle while on Travel, the operator of the vehicle must possess a valid operator's license. The operator is personally responsible for any fines and/or penalties resulting from citations, charges, or warrants due to operator negligence.
- 5.3 Commercial rental vehicles.
 - 5.3.1 Commercial rental vehicles may be used for Travel on University business.
 - 5.3.2 The University's contracted rental car provider(s) must be used unless there is a lack of availability.
 - 5.3.3 Travelers are strongly encouraged to make reservations through the University's contracted Travel Management Company unless booking directly with the University's contracted rental car provider(s).
 - 5.3.4 Reservations must be made in accordance with the University Travel Manual. Travelers must submit all requirement documentation specified in the University Travel Manual with their expense reports.
- 5.4 Privately owned vehicles/courtesy vehicles.
 - 5.4.1 Privately owned or courtesy vehicles may be used when traveling on University business. When using a private vehicle, Travelers are responsible for carrying and maintaining liability insurance.
 - 5.4.2 Reimbursement will be made in accordance with the University's Travel Manual and shall not exceed the prevailing rate per mile established by the Internal Revenue Service.
 - 5.4.3 Mileage claimed by the Employee shall not include the distance traveled during the Employee's standard daily commute. However, if the Employee is traveling directly from their residence and the distance is closer than their work location, reimbursement should be calculated on that distance.
 - 5.4.4 Mileage incurred during Travel within the county of the Employee's official work location (i.e., driving from one University building to another University building

in the same county) will not be reimbursed unless granted an exception in accordance with the University Travel Manual.

5.5 State-owned vehicles.

5.5.1 The availability and use of a state-owned vehicle will be determined by the University's fleet management policies and procedures.

5.6 Other ground transportation.

5.6.1 Rail, bus, shuttle, and other ground transportation (e.g., taxis and peer-to-peer ridesharing services) may be used in accordance with the University Travel Manual. Travelers are expected to use the lowest logical fare.

SECTION 6: LODGING.

6.1 Travelers are strongly encouraged to make all hotel reservations through the University's contracted Travel Management Company unless booking directly through the specific conference.

6.2 Travelers are expected to use good financial judgment when selecting hotels and shall select the University's contracted hotel providers when possible.

6.3 Lodging expenses include room rates, use of meeting rooms, all applicable taxes and surcharges. Reservations must be made in accordance with the University Travel Manual.

6.4 Reservations must be made in accordance with the University Travel Manual. Travelers must submit all requirement documentation specified in the University Travel Manual with their expense reports.

6.5 Miscellaneous lodging related expenses deemed allowable in the University Travel Manual are permitted.

SECTION 7: MEALS AND INCIDENTALS.

7.1 Meals and incidental expenses while on Travel will be reimbursed to the Traveler. This reimbursement rate shall be set forth in the University's Travel Manual and shall not exceed the rate established by the General Services Administration (GSA). Specifically excluded are alcoholic beverages and entertainment expenses.

7.2 If the Travel occurs entirely in one calendar day, meals will not be reimbursed.

- 7.3 Meals provided to the Traveler must be deducted from the reimbursement amount.
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SECTION 8: REGISTRATION FEES.

- 8.1 Fees or charges for attendance at conferences, meetings, seminars, and/or workshops for official University business are permitted.
- 8.2 Advanced payment of registration fees is permitted if required or if doing so results in savings to the University.
- 8.3 If a cancellation charge is incurred, the charge is permitted if the Traveler is required to change travel plans for business reasons or other extenuating circumstances.
- 8.4 The Traveler will not receive an allowance or reimbursement for lodging or food that is included in registration fees.
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SECTION 9: OTHER TRAVEL EXPENSES.

- 9.1 Travelers may incur other business-related expenses in accordance with the University's Travel Manual.
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SECTION 10: FORM OF PAYMENT FOR BUSINESS TRAVEL EXPENSES.

- 10.1 The University's Procurement Card (PCard) and/or other University card products.
- 10.1.1 Travelers should use the PCard and/or other designated University card products as the payment method for all Travel expenses except for individual Traveler's meal expenses and fuel for personal vehicles.
- 10.1.2 All expenses paid on the University PCard must be reconciled using the University's expense management system within the timeframe designated in the University's PCard Manual.
- 10.1.3 All documentation must be submitted as required in the University Travel Manual.
- 10.2 Expenses paid with personal funds.
- 10.2.1 If travel expenses are paid with personal funds, Travelers must submit a request for reimbursement through the University's expense management system.

10.2.2 All documentation must be submitted as required in the University Travel Manual.

SECTION 11: DEFINITIONS.

- 11.1 “Employee” means any Faculty or Staff.
- 11.2 “Faculty” is defined in BOG Faculty Rule 4.2 – Appointment, Promotion, Tenure, and Dismissal for Cause.
- 11.3 “President” means the President or designee.
- 11.4 “Personal Expenses” means expenses incurred while traveling in a personal capacity for the Traveler’s personal benefit.
- 11.5 “Staff” means all Classified Employees and Non-Classified Employees, defined in BOG Talent & Culture Rule 3.1 -- Administration and Employment Practices.
- 11.6 “Travel” means travel away from the Traveler’s official work location for the purpose of conducting business for the primary benefit of the University’s mission. The dates of Business Travel may include one day prior to the start of University business, all days University business is being conducted, and one day following the conclusion of University business.
- 11.7 “Travel Management Company” means the University’s contracted vendor that manages the Business Travel for the University.
- 11.8 “Traveler” means an individual (Employee or non-employee) who has been authorized to travel on behalf of the University on official University business.
- 11.9 “University Travel Manual” means the document outlining the detailed policies and procedures of the University’s travel program.
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SECTION 12: DELEGATION.

- 12.1 The Board of Governors delegates to the President the authority to adopt additional internal policies and procedures to effectuate the implementation of this Board of Governors Rule or in furtherance of any other authority that the Board of Governors has specifically delegated to the President pursuant to this Rule. Any actions taken pursuant to this delegation must be consistent with the guidelines provided by this Rule.
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SECTION 13: AUTHORITY.

13.1 W. Va. Code §12-3-11

SECTION 14: SUPERSEDING PROVISIONS.

14.1 This Rule supersedes and replaces West Virginia University Board of Governors Policy 4 which was originally effective October 1, 2002 and amended June 6, 2003. It also supersedes and replaces Higher Education Policy Commission (“HEPC”) Series 29, which was adopted on August 1, 2002, and any other Rule of HEPC which relates to the subject matter contained within this Rule.