



Trustee Organization Procedures

Travel Purchasing

Guide for procuring travel services

UConn

STUDENT ACTIVITIES

TRUSTEE STUDENT
ORGANIZATION SUPPORT

Safe & Reasonable

OVERVIEW

All travel is governed by University Travel Policy <https://travel.uconn.edu/travel-policy/> and TSOS.

Safety is always a top priority with the activities of the Tier III Organizations but travelling has inherent risk and ***safety is an overriding concern.***

Cost/Benefit is also an area of focus as with any purchase, however:

safety of the student traveler(s) should never be compromised for cost-effectiveness!

Both, planning, and decisions during the travel itself, should always reflect the priority of safety first.

The goal with travel is no different than other purchasing in that arrangements should meet the need but spending should be minimized (but safe!) and not exceed the need.

They also must be reasonable for the travelers. For example, students would not be expected to miss class or drive through the middle of the night even if doing so reduces costs. However, if adjusting the schedule, within reason, is less expensive, then it should be done.



Who, When & Why of Travel

WHO

- These procedures are for T3 Members traveling on Org business **ONLY**
- These procedures are **NOT** for the funding of travel for T2 RSOs
- Traveler(s) must be identified in PR documentation



WHEN

- Start the process as soon as the org is aware of the need to travel, ***AT LEAST A MONTH PRIOR***, as prices increase the closer the purchase is made to the date of travel.
- Off Campus Activity Advising Form for Storrs Orgs* traveling off campus must be submitted **AT LEAST 14 DAYS PRIOR** to travel <https://studentactivities.uconn.edu/off-campus-activity-notification-form/> and be included in purchase request. Regional Orgs can use this or submit their own internal approval documents.
- Request(s) for declining balance cards must be submitted ***AT LEAST 14 DAYS PRIOR***
- Advance requests must be submitted ***1 WEEK PRIOR*** to the last business day before departure

WHY

A clearly defined business purpose, or justification, must be articulated to support travel purchases and how it will benefit your constituents. It must include justification for the number of students travelling, accommodations, mode of travel and itinerary, considering safety, cost and stewardship with a goal to be safe and meet the need, but not overspend.

What and Where of Travel

WHAT

The first part of the documentation beyond the approving motion is the documentation of the event for which travel is required. If Registration is required, submit for that payment at the same time.

For example, a screenshot of the internet page for a conference or a game schedule for media coverage.

Some additional details that will help you determine other expenditures:

What day and time does the event/activity begin and end?

These are the key times you will build your itinerary around

Is lodging part of the event eg. conference is being held at a hotel and rooms are blocked for the event?

If so, be sure to plan early and you may be able to get an exception for the cost of the hotel

Are there meals provided for any part of the event?

If so, they must be deducted from the per diem meal request

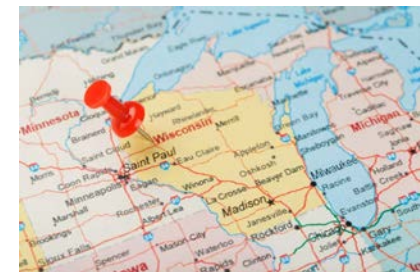
WHERE

Where the event/activity is being held will dictate your main mode of travel

Is it reasonable to drive with good access to parking?

Is it a reasonably close city where a train or bus ticket a better way to travel?

Or is the distance such that a plane is the only reasonable way to travel?



How of Travel

HOW

- **Air**
 - Paid directly by the University (Monthly Bill)
 - Students can research flights that will reasonably get them to the event and back selecting the most cost-effective flight for the purchase documentation
- **Train**
 - Train ticket costs are paid by declining balance card (Monthly Bill)
 - Students can look up fares to include in the purchasing documentation
- **Bus**
 - Bus ticket costs are paid by declining balance card (Monthly Bill)
 - Students can look up fares to include in the purchasing documentation
- **Rental Car from Willimantic**
 - Enterprise Rent-a-Car is our contracted company when leaving from, and returning to Willimantic
 - Paid directly by the university (Monthly Bill)
 - Students can seek a quote to include in the purchasing documentation
 - May require tolls and/or parking which can be paid by declining balance card (Monthly Bill)
- **Personal Vehicle**
 - Advanced
 - Mileage paid per the IRS standard rate at time of travel covers fuel, insurance, registration, tax, wear and tear, etc.
 - May require payment of tolls and parking
 - Supported route documentation and [Mileage Affidavit Form](#) (requires minimum level of insurance)



Lodging & Ground Transportation

- **Lodging**

- Paid by declining balance card (Monthly Bill)
- Students can search for lodging selecting the most cost-effective option considering safety, transportation costs and time to venue
- Choice must comply with limitations set forth by <https://www.gsa.gov/travel/plan-book/per-diem-rates>
- Exceptions can be sought when justified such as when a conference offers lodging at the venue
- Consider if lodging provides meals such as a complimentary breakfast (deduct from per diem meals)
- If there is a restaurant that is part of lodging, you will save on ground transportation
- If they provide a shuttle to/from transportation hub or activity/event, you will save on ground transportation

- **Ground Transportation** (if driving a personal vehicle to get to activity/event, see previous slide)

- Students should research to determine safe and cost-effective means of ground transportation
- How will you get to/from your transportation hub, eg airport, train or bus station, etc
- How will you get to/from your transportation hub to your lodging?
- How will you get from lodging to the activity event?
- How will you secure meals?
- If free or reduced rate transportation is provided by lodging or event, it must be used
 - Shuttle, Taxi, city bus or city train/subway are paid by declining balance card
 - Personal Vehicle (See previous slide)



Itinerary

With the knowledge of the event/activity, mode of travel, lodging and ground transportation and all of the associated times, the itinerary can now be created which should be part of the purchase request.

Building your Itinerary starting backwards, starting with the purpose of travel building in reasonable amounts of time to comfortably travel between points.

- Event/Activity start time
- Set-up time requirement prior to the event/activity
- Whether you arrive straight to the activity/event or check-in to lodging before
- Time to get to lodging or event/activity
- Time to get from lodging to event/activity
- Time to get from transportation hub
- Transportation time
- Time required to arrive at transportation hub in advance of departure
- Time to get to transportation hub
- Class time to avoid missing

Build your return itinerary similarly, starting with the point the activity/event ends



Per Diem Meals & Misc Costs

MEALS

With the knowledge of the meal provisions for the event/activity and lodging as well as the itinerary in place, you can now determine the per diem meal allowances.

Per diem meals are paid per the Government Rates <https://www.gsa.gov/travel/plan-book/per-diem-rates/>

With an overnight stay, per diem meals will be paid 100% when student is off campus for the entire 24-hour day 75% on travel days.

Without an overnight stay, per diem meals can be paid if student must be off-campus 10-hours or more for the activity and then at 75% of GSA per diem rates.

Regardless of overnight stay, if a meal is provided with the activity/event, it must be deducted from the established per diem.

Per Diem Meals can be paid to Storrs student travelers in advance - may differ at regional campuses.

OTHER MISC TRAVEL COSTS TO CONSIDER

Paid with a declining balance card:

- Parking and Tolls
- Extra baggage fees for camera equipment for media coverage
- Internet charge to broadcast from the venue



Organization Motion

All purchasing decisions must be approved in a motion during a public meeting. For travel, a vote is required for a student to travel on org business **even if there are no costs associated**. Motions should anticipate what elements of travel are authorized and should indicate a cap for each element via a budget and an overall cap. It is a best practice to submit a budget that has rows for each expense type, a column for quote supported estimates and then a maximum for each as well. The motion can approve the proposed budget for xyz travel for a total cost of no more than \$. While registration is a separate purchase, it should be included in the budget and motion, if applicable to travel, and proceed through the process simultaneously.



“The best Trustee Organization hereby moves to approve up to \$1850 for the travel of two students, J. Bean and B. Smith to attend the Men’s basketball game in Anywhere, TX on October 10, 2020, per the attached itinerary and budget.”

Expense Type	Maximum		Details	Payment Method
	Quotes	Allowable		
Mileage	\$20.00	\$20.00	1 vehicle	advance
Air	\$700.00	\$1,320.00	2 seats	university
Lodging	\$150.00	\$300.00	1 shared room, 2 QB	declining balance
Ground Travel	\$30.00	\$60.00	shared shuttle from/to airport & venue	declining balance
Meals	\$150.00	\$150.00	2 travel days @ 75%	advance
Total	\$1,050.00	\$1,850.00		
Itinerary:	10-Oct	10am	Leave campus for airport	
	10-Oct	Noon	plane departs	
	10-Oct	3pm	plane lands	
	10-Oct	4:30pm	check-in at hoitel	
	10-Oct	6pm	arrive at game	
	10-Oct	8pm	game starts	
	10-Oct	11pm	arrive back at hotel	
	11-Oct	8am	check out and leave for airport	
	11-Oct	10:30am	plane departs	
	11-Oct	1:30pm	plane lands	
	11-Oct	3pm	arrive back at campus	

Next Steps

BOOKING TRAVEL

Travel will be submitted through the UCONNTACT PR Process

Registration is a separate request within UCONNTACT but should be done at the same time.

Once TSOS has reviewed and approved:

- Registration can be purchased, if applicable

- Declining Balance Cards can be requested

- Advance check requests can be submitted

- Student travelers can then make an appointment with staff to book their travel

Travel Booking



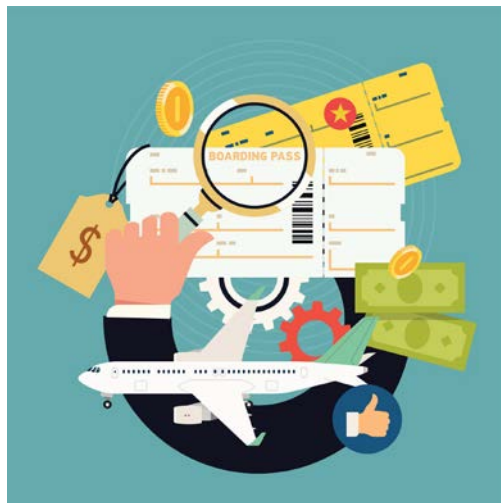
RECEIPTS

Most, if not all, travel costs are paid on behalf of the traveler and out-of-pocket expenses should be minimized. Travelers must keep **ALL** receipts and paperwork associated with the trip for which org funds were used. They may be required for the completion of post-travel paperwork and once completed, must be submitted to the treasurer in a single envelope for organization records.



Payment Method Summary

1. Maximize what is paid directly by the university and charged on your Monthly Bill (Air, Local Rent-a-car)
2. Maximize what the Org can pay you for in advance (via check) that does not require any reconciliations after unless there's an unforeseen change in travel plans (Mileage, Per Diem Meals)
3. Maximize use of the declining balance card (monthly bill) for remaining approved expenses
4. We ask that orgs/travelers exhaust all other options prior to having a student incur out of pocket expenses. If unavoidable, traveler may be able to pay costs out-of-pocket and seek reimbursement through Concur.
5. Students must pay directly for any/all personal expenses and they are NOT reimbursable.



T3 Member Travel on Org Business submitted through UCONNTACT and paid:	Direct by University (Monthly Bill)	Advance (Direct from Org Checking Account)	Declining Balance Card (Monthly Bill)	Reimbursement through Concur (Monthly Bill)
Air	Preferred	NO	NO	NO
Local Rental Car	Preferred	NO	NO	NO
Mileage	NO	Preferred	NO	Not Preferred
Meals	NO	Preferred	NO	Not Preferred
Train	NO	Not Preferred	Preferred	Not Preferred
Bus	NO	Not Preferred	Preferred	Not Preferred
Tolls	NO	Not Preferred	Preferred	Not Preferred
Parking	NO	Not Preferred	Preferred	Not Preferred
Lodging	NO	Not Preferred	Preferred	Not Preferred
Ground Transportation	NO	Not Preferred	Preferred	Not Preferred
Personal Expenses	Students are responsible for ALL personal expenditures			

Tips and Guidelines

- **Start early!** Travel related requests should be submitted as soon as they are approved by a vote. If the trip gets cancelled for any reason, it is not an issue to cancel it on our end as long as nothing was already booked.
- **Authorize enough money!** Anticipate all costs and elevated travel costs when voting on travel. Quite often, airfare and hotels are more expensive when being booked than when your organization initially gathered quotes. If your org voted “up to” amount is slightly higher than the total of your quotes, that will provide any needed buffer. It is okay for costs to be less than the PR but if the actual costs exceed the PR, it will minimally require the approval of the Treasurer and President and potentially require a new vote. As long as the cost/benefit still favors your constituents, vote and request the maximum amount to avoid costly delays.
- **Be efficient!** If travelling for the same purpose multiple times in a semester/year, orgs can vote on a total amount for each type of travel (Women’s Basketball, Men’s Basketball, Football, Baseball, and conferences) at the beginning of the semester, and then those minutes can be submitted along with your purchase requests for each trip. They also may be able to submit one request to the OCAA area.
- **Minimize Student Traveler out-of-pocket expenses!**
Not all students have the same personal economic resources, but all students should have the same opportunity to participate in your organization activities regardless of personal economic resources.

Also, avoid the risk of a student who can’t be reimbursed for something that they expended personal funds



Questions

Staff that will handle travel varies by Org. They should guide you on what is expected of you following TSOS favorable review of your travel.

University travel also has a lot of support resources, of note are setting up your profile, adding a delegate and submitting a travel request:

<https://travel.uconn.edu/training-and-resources/>

Trustee Student Organization Support:

Office 860-486-6461

trusteeorgsupport@uconn.edu



Thank you!