

## Policies and Procedures Manual

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Title: Faculty Conference Travel Policy  
Policy Administrator: Director of Academic Budget & Operations  
Effective Date: Jul-01-2021  
Approved by: The Provost/Dean of the College

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### **Purpose:**

To support faculty in their presentations of scholarly work in their support of professional development, the College provides full or partial support for many expenses that incur when traveling for professional reasons.

### **Policy:**

The Statutes of the Faculty offers the following commentary on the College's expectations of its faculty members:

[The] College recognizes [that] its faculty is part of a wider academic community to which both the individual faculty member and the College have responsibilities involving the advancement of knowledge. These are usually met through scholarship and participation in the affairs of learned societies. (Statutes of the Faculty, Section II.B.)

The Provost and Dean of the College (Provost/Dean) supports travel undertaken either (a) to present the results of research to a meeting of the faculty member's peers in his or her discipline or to a wider academic audience, or (b), in certain cases outlined in Section B below, to participate in professional meetings. This document provides information about what expenses will be covered by the Provost/Dean and directions about how faculty members should apply for reimbursement.

The Committee on Faculty Scholarship stipulates procedures by which faculty members may apply for funding to conduct research (e.g., by visiting archives or undertaking fieldwork). From time to time, that Committee issues its own guidance on how faculty members may apply for such support.

### **A. Source of Funding**

All funds for travel to conferences (or for equivalent purposes as described below) are administered by the Office of the Provost/Dean. Academic departments may not use funds from their operating budgets to support such travel. Endowed funds and grant funds from external sources may be

allocated for such purposes only if such allocation is consistent with the purposes of the endowment or grant.

## **B. Eligible Travel**

### **B.1. Tenured and tenure-track faculty**

Faculty members who have been appointed to the ranks of professor, associate professor, assistant professor, or instructor<sup>1</sup> may apply for reimbursement of travel expenses under any of the following circumstances:

a. Their name appears in the published program of a professional conference, symposium, workshop or meeting as a presenter, panelist, discussant, session chair, or officer of the sponsoring organization.

b. They have been invited to offer a “keynote” or other major address to an academic or professional audience on the basis of their academic expertise. They are attending an event at which their artistic or creative work will be presented and at which their presence will be formally recognized such as a gallery opening of a single-artist show, the premiere of a significant work, a poetry reading, or similar event.

For tenured and tenure-track faculty members, the College will support up to three conferences per fiscal year<sup>2</sup>, including up to two international conferences, for all tenured and tenure-track faculty with a total annual maximum cap of \$3,000. Each trip is capped at up to \$1,250 per supported trip within the U.S. or to Canada, and capped at \$1,800 per supported international trip, including Hawaii (not including Canada).

### **B.2. Tenure-track faculty in their first two years**

The College has a particular interest in fostering the professional growth of tenure-track faculty members. Tenure-track faculty members in the first two years of employment at the College<sup>3</sup> may apply for reimbursement of travel expenses to attend one professional conference (or equivalent event) in that year even if none of the criteria stipulated in Section B.1 are met. Such applications will generally be approved.

### **B.3. Pedagogical or assessment-oriented conferences**

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<sup>1</sup> As defined in Statutes, Section 1.A

<sup>2</sup> The College uses a fiscal year that begins on July 1 and ends on June 30. The first official day of a conference will be used to determine the fiscal year in which it occurs.

<sup>3</sup> For the purposes of this Policy, periods spent on leave (family leave, pre tenure research leave, unsalaried leave) must count as years of employment.

The College prides itself on the high standards of the teaching that its faculty members provide. It also strives to demonstrate excellence in all areas of academic performance through outcomes assessment. In addition to whatever applications they may make for reimbursement of travel under Section B.1 above, therefore, faculty members who have been appointed to the ranks of professor, associate professor, assistant professor, or instructor may apply for reimbursement of travel expenses to attend one professional conference per fiscal year at which they can reasonably expect to acquire new skills in the areas of teaching, advising, or learning outcomes assessment. Such applications will be reviewed by the Dean(s) of the Faculty and approval will depend on the strength of the case that the applicant advances and on the availability of funds. Faculty members are advised to request prior approval of reimbursement for such trips before making travel arrangements (see Procedures).

#### **B.4. Full time Officers of Instruction**

Faculty in this category have the title of professor of practice, visiting professor, visiting associate professor, visiting assistant professor or visiting instructor. This category also includes full time employees who teach four courses or fewer but perform administrative duties within their department and hold the rank of lecturer or senior lecturer.

Faculty members who have been appointed full-time as an officer of instruction at the College may apply for reimbursement of travel expenses to attend one professional conference (or equivalent event) during the term of their contract<sup>4</sup> provided that their participation meets at least one of the criteria stipulated in Section B.1 above. Applications for additional conference travel may be submitted and will be reviewed by the Dean(s) of the Faculty. Approval will depend on the strength of the case that the applicant advances, the length of time that the applicant has been teaching at the College, and the availability of funds. In most cases, reimbursement will be at a level lower than that set for full-time tenure and tenure track faculty members. (see Section E. 2.of the Policy). Faculty members must request prior approval of reimbursement for such trips before making travel arrangements (see Procedures).

#### **B.5. Part-Time Officers of Instruction**

Faculty members on part-time appointments teach four courses or less and have the rank of lecturer, senior lecturer or visiting lecturer. Part-time officers of instruction may apply for reimbursement of travel expenses to attend one professional conference (or equivalent event) provided that their participation meets at least one of the criteria stipulated in Section B.1 above. Please see section E.3.

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<sup>4</sup> Note that contracts for officers of instruction begin with the Mass of the Holy Spirit in one year and end with Commencement the following year. Travel for which reimbursement will be requested must occur within this period of approximately nine months.

Such applications will be reviewed by the Dean(s) of the Faculty and approval will depend on the strength of the case that the applicant advances, the length of time that the applicant has been teaching at the College, and the availability of funds. In most cases, reimbursement will be at a level lower than that set for full-time faculty members (see Section **E.3** of the Policy). Please request prior approval of reimbursement for such trips before making travel arrangements (see Procedures).

#### **B.6. Professor Emeritus**

Retired faculty members who have emeritus status at College of the Holy Cross may apply for reimbursement of travel expenses to attend one professional conference (or equivalent event) per year, provided that their participation meets at least one of the criteria stipulated in Section B.1. above.

### **C. Travel**

#### **C.1. Duration of Travel**

Holy Cross stresses the close community of faculty and students. Furthermore, the nature of the college demands a high degree of availability by the faculty for the smooth and effective administration of [the] academic, departmental, and collegiate goals of the school. Therefore, presence on campus during the regular school hours is the norm.

Both for this reason and in order to ensure that the College retains the ability to assist as many faculty members as possible with the limited funds available for this purpose, the College will normally reimburse expenses for a maximum of four days and three nights for domestic trips and five days and four nights for international trips. (See, however, Section F.1 of this Policy.) Faculty members are expected to make careful arrangements to preserve the integrity of the courses they are teaching.

#### **C.2. International Travel**

All faculty pursuing international travel with reimbursement from the College must follow the policies and procedures outlined in this travel policy. In addition, faculty members traveling abroad must review and complete the [Foreign Travel Waiver Form](#) as appropriate:

The College of the Holy Cross has contracted with International SOS, a global security assistance and medical/travel insurance provider to support students, faculty, staff, and administrators traveling internationally. International SOS offers medical, mental health, security, as well as logistical expertise. It also offers pre-departure information, 24/7 assistance and advice while abroad through a dedicated phone app, website, and call centers throughout the world, and emergency assistance. Information regarding International SOS can be found at this [link](#). This insurance is offered at no cost to faculty traveling abroad for College-related travel.

Prior to departure, please follow the steps below to ensure International SOS support while traveling.

- a. Visit the [Holy Cross/IntlSOS](#) website to review IntlSOS resources and access your Proof of Membership. Please contact the Department of Risk Management and Contracts for the membership number at 508-793-2394.
- b. Click [HERE](#) for more information on the [IntlSOS App](#).
- c. Once you have registered the IntlSOS App, you can easily contact IntlSOS by simply clicking on the button below in your IntlSOS App.
- d. Add the following dedicated Holy Cross IntlSOS phone number to your contacts: (+1-215-942-8478)

#### **D. Eligible Expenses**

The following expenses are generally eligible for reimbursement under this Policy:

- a. The cost of air travel (including baggage fees).
- b. The cost of essential ground transportation.
- c. The cost of registration for the conference (or equivalent event).
- d. The cost of parking, either at an airport or at the conference site.
- e. The actual cost of lodging.
- f. Meals and other incidental expenses per diem equal to \$45 per day, as of July 1, 2018.
- g. For all other expenses or questions about expenses refer to the [Financial: Travel and Entertainment Policy](#).

**Itemized receipts are required for expenses greater than \$75.00 claimed in categories A through E above.**

It is expected that faculty members will make every effort to economize when traveling, thus drawing less heavily on the limited funds available and allowing the College to fund as many trips as possible for as many faculty members as possible at the highest rate possible. All College related travel must be made with [Egencia Travel](#). Receipts for travel arrangements made through automatically be fed into Chrome River.

In particular, faculty members should exercise good judgment in remaining flexible regarding flight times and routes; and rely on public transportation or on airport coach services in preference to renting cars unless circumstances make the latter a more reasonable alternative.

**The Dean(s) of the Faculty may reduce or disallow reimbursement where she or he feels that such discretion has not been exercised appropriately.**

## **E. Reimbursement**

**E.1** The College will reimburse a tenured or tenure-track faculty member for 100% of eligible expenses capped at up to \$1,250 per supported trip within the U.S. or to Canada, and capped at \$1,800 per supported international trip, including Hawaii (not including Canada), with a total maximum annual cap of \$3,000.

**E.2** The College will reimburse other full-time officers of instruction for 100% of eligible expenses up to \$1,250 for one trip.

**E.3.** Officers of instruction who are appointed part time may apply for reimbursement for one trip with a maximum support of \$625. Reimbursement will depend on the strength of the case that the applicant advances and on the availability of funds as determined by the Dean(s) of the Faculty.

**E.4** All college-related travel must be made with [Egencia Travel](#).

**E.5** Faculty members may choose to use their College ProCard or they may use their personal credit card. If a personal card is used, the traveler can be reimbursed before the trip. However, if the expenses have been reimbursed but the trip has been canceled, the traveler is required to pay back the funds to the College.

**E.6** Faculty members are responsible for forwarding their receipts by email to the Chrome River email address: [receipt@ca1.chromeriver.com](mailto:receipt@ca1.chromeriver.com). If a faculty member has delegated her/his account reconciliation to the department's administrative assistant, it is the faculty member's responsibility at the end of the trip to notify her/his department's academic administrative assistant when all receipts have been forwarded to the account.

**E.7** Even if the completion of an expense report is delegated to an administrative assistant, the traveler is required to verify in Chrome River the accuracy of the expenses incurred.

## F. Special Considerations

**F.1.** Faculty members may apply for “special circumstances” for a trip that will be exceptionally expensive, for additional trips in a single year or for additional overall support. Special effort should be made to moderate travel costs to fit within the guidelines. Special circumstances may include but are not limited to:

- Coverage for additional days in the case of international conferences or conferences on the West Coast or trips to Alaska or Hawaii.
- Coverage for additional days in the case when two conferences are held consecutively. (For example, smaller organizations that meet right before or right after a larger conference.)
- An increase in the per-trip cap in cases when the flight cost is very high (e.g., exceeds 75% of the cap for the trip) or the conference fee is high (e.g. exceed 50% of the cap for the trip).
- Coverage for a fourth trip may be considered if the faculty member is required to attend the conference because of his or her appointment as an organizer of the conference, an officer in a professional organization or as a journal editor. The faculty member should work with the Dean(s) of Faculty to develop a year-long travel plan.

Such requests must be submitted well in advance of the trip and will be reviewed by the Dean(s) of the Faculty, whose approval will depend on the strength of the case that the requestor advances and on the availability of funds. Faculty members should request prior approval of such variances before making travel arrangements.

**F.2.** When the organization sponsoring a conference, meeting, symposium or workshop meets the costs of participants’ travel, lodging, meals or incidental expenses, a faculty member may apply to the College only for reimbursement of expenses not covered by that organization.

**F.3.** Faculty members requesting reimbursement for travel abroad must complete the College’s [Foreign Travel Waiver Form](#) prior to leaving the United States. No reimbursement will be forthcoming unless a signed form is on file.

### Procedures:

#### Prior to Travel

1. **Pre-Approval Report** – The traveler or administrative assistant with delegated authority creates a Pre-Approval Report in [Chrome River](#). Normally the faculty member is expected to complete the pre-approval. However, the faculty member may request assistance from the academic administrative assistant if needed.

[Chrome River](#) is available on the Faculty/Staff page on the Holy Cross website.

Pre-Approval Report must include:

- Dates of travel
- Plan to cover missed classes.
- Provide evidence of participation by uploading a copy of the invitation or agenda.
- Indicate supplemental sources of funding. Note: If the costs exceed the approved conference travel rate and there are no additional approved sources of funding, the faculty member is responsible for the additional costs.

**2. The Pre-Approval Report name must have a naming convention:**

D or I (Domestic or International) LastName\_Destination\_Month (use the state or country for destination)

**Example: D\_Gull\_CA\_07**

**3. In the Allocation field, select from the following:**

- Conference Travel: 1000-220020-1000-00000
- Recruiting: 1000-220003-2000-xxxxx (class code - individual for each department)
- Administrative Travel: 1000-220000-2000-00000
- If applicable, indicate supplemental source(s) of funding by clicking the **+** (add allocation)

**4. The Pre-Approval Report** is electronically routed through Chrome River by email to the Department Chair. Once the Department Chair approves the request, the Pre-Approval Request is routed to the Dean of Faculty Office for review and approval.

Faculty members may use chose to use their College ProCard or they may use their personal credit card. If a personal card is used, the traveler may be reimbursed before the trip. If the traveler does not already have a ProCard and would like one, requests can be made to the Deans of the Faculty office. Pro cards are not issued to visiting faculty members.

## **DURING TRAVEL**

1. The traveler is responsible for forwarding receipts by email to [receipt@ca1.chromeriver.com](mailto:receipt@ca1.chromeriver.com).

See the [HC Procurement Card Policy](#) for information about the use of the ProCard.

## **AFTER TRAVEL**

The traveler completes the Expense Report form in



The Expense Report form can also be completed by the administrative assistant with delegated authority. If the report is to be completed by the administrative assistant, the traveler is responsible for notifying the administrative when all receipts have been submitted and for giving final approval to the expense report. The traveler is responsible for any errors on the expense report.

Click here to enter text.

**Forms:**

Title: <b>Foreign Travel Waiver</b>
URL: <a href="https://www.holycross.edu/policies-procedures/forms#F">https://www.holycross.edu/policies-procedures/forms#F</a>
Title: <b>Holy Cross International Travel Risk Management</b>
URL: <a href="https://www.holycross.edu/compliance-and-risk-management/international-travel-risk-management">https://www.holycross.edu/compliance-and-risk-management/international-travel-risk-management</a>

**Related Information:**

Title: <b>CR Quick Help Faculty Conference Travel</b>
URL: <a href="https://docs.google.com/document/d/1Oxj_eBVLcHO7IDkL1YHRbeczRYAMkdDmRYFgRSFi_mU/edit">https://docs.google.com/document/d/1Oxj_eBVLcHO7IDkL1YHRbeczRYAMkdDmRYFgRSFi_mU/edit</a>
Title: <b>Egencia</b>
URL: <a href="https://www.egencia.com/home/#flight-search">https://www.egencia.com/home/#flight-search</a>
Title: <b>Financial: Travel and Entertainment Policy</b>
URL: <a href="http://www.holycross.edu/sites/default/files/files/policyprocedure/adminfinance/340000-002financial-employeetravelandexpense_policy_0.pdf">http://www.holycross.edu/sites/default/files/files/policyprocedure/adminfinance/340000-002financial-employeetravelandexpense_policy_0.pdf</a>
Title: <b>Procurement Card Policy</b>
URL: <a href="http://college.holycross.edu/policiesforms/administration/340040-002procurementcardpolicyprocedures.pdf">http://college.holycross.edu/policiesforms/administration/340040-002procurementcardpolicyprocedures.pdf</a>

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