

To: Policy Review and Approval Process

From: Terri O'Toole, Senior Director of Purchasing & Payment Services, Perry Hull, Director of Travel & Payment Services and Melaney McKellar, Travel Manager.

Policy Owner(s): Chief Financial Officer

Date: April 28, 2025

Re: Changes to Policy 3-030 and Rule Updates

Existing Policy & Rules

[Policy 3-030: Travel Policy](#)

[Rule R3-030A: Airfare Costs and Class of Service](#)

[Rule R3-030B: Travel Cash Advances](#)

[Rule R3-030C: Per Diem](#)

[Rule R3-030D: International Travel Safety and Insurance](#) (not included in this update)

Introduction and Background

We are pleased to announce updates to Policy 3-030 and its associated rules, aimed at making travel policies more straightforward and user-friendly for faculty and staff members. These revisions are designed to simplify the policy without altering the essential requirements for booking travel or obtaining reimbursements.

Key Points:

- **Improved Accessibility:** The policy has been consolidated to enhance clarity and ease of use. Outdated memos have been updated to ensure all travel-related information is current and relevant.
- **Consistency in Booking and Reimbursement:** The core processes for booking travel and receiving reimbursements remain unchanged. Faculty and staff members can continue using personal cards, selecting preferred flights and hotels, and paying for upgrades as needed.

These updates are intended to reduce the administrative burden on faculty and staff, allowing more focus on academic or administrative duties.

Proposed Changes

Policy 3-030 Travel Policy:

The policy now features a more detailed purpose and additional relevant definitions and outdated terms have been removed. To streamline the document, two new rules have been created, resulting in a shorter, more concise policy.

Section III.D. was added to give additional information for travelers about policy enforcement and compliance.

The following sections have been removed and their information is now included in the new Rule R3-030A:

- Insurance
- Reimbursable Costs: General Principles
- Reimbursable Costs: Transportation Costs
- Reimbursable Costs: Non-transportation Costs
- Reimbursable Costs: Advances
- Reimbursable Costs: Expenses Payable in Part from Nonuniversity Sources

Rule R3-030A University Travel Payment and Allowable Expenses:

This rule consolidates specific travel and payment information to make it easier for travelers to find. It also includes updates related to the university's Travel and Payment System, providing essential information for travelers, those booking travel and others involved in the travel process.

The rule is organized with the following sections:

- Payment and Reimbursement
- Travel Cards
- Airline Tickets
- Lodging
- Meals and Per Diem
- Travel in a Personal Automobile
- Travel in a University Fleet Services Vehicle
- Rental Cars
- Other types of Transportation
- Other Allowable and Unallowable Costs

Rule R3-030B Group Travel:

Recognizing the unique aspects of group travel compared to individual travel, the travel management team has introduced a new rule to assist those booking or traveling with a group.

The rule is organized with the following sections:

- Booking Group Travel
- Group Travel Purchases
- Group Travel Ground Transportation
- Group Travel Meals
- Reconciling Group Travel Expenses

Repeal of Existing Travel Rules:

Due to updates in the Travel Policy and the creation of two new rules, relevant information from the current rules and memos has been modernized, reorganized and incorporated into the new rules. The following links/rules will become obsolete as part of this update:

- [Rule R3-030A: Airfare Costs and Class of Service](#) (Obsolete)
- [Rule R3-030B: Travel Cash Advances](#) (Obsolete)
- [Rule R3-030C: Per Diem](#) (Obsolete)

Policy Review Process

Entity	Reviewed?
Procure to Pay Leadership	Reviewed by Terri O'Toole and Perry Hull
Travel Management Team	Reviewed by Melanie McKellar
Internal Audit	Reviewed by Holly Andrus
University Policy Office	Reviewed by Allyson Hicks
Travel Advisory Board	Reviewed 2/11/25
OGC	Approved by Robert Payne 3/7/25
CFO	Verbally approved by Cathy Anderson 3/7/25
Institutional Policy Committee	Presented 3/14/25
Academic Senate Executive Committee	Presented 4/14/25