

## DEPARTMENT OF LINGUISTICS

### Travel Policy & Instructions for Graduate Student Travel Funding

2019-2020

#### INTRODUCTION

Units within CAS are responsible for ensuring that employee travel has been properly approved and that applicable travel policies, rules, regulations, procedures and guidelines have been applied. The College of Arts and Sciences has been delegated the task of assigning a hierarchy of responsibility for approvals for employee travel payments from all university funds. To that end departments and programs have been asked to develop written travel approval policies and procedures readily available to all travel staff and travelers for reference. A copy of these procedures must be filed with the CAS Dean's Office each year.

This document also contains instructions for how graduate students in the Theoretical Program apply for funding support for travel from the department.

#### PERSONAL AND BUSINESS TRAVEL POLICY

When combining personal travel with UO business travel payment, payment will be based on the least expensive and reasonable means of transportation, and the meal and lodging per diem to which the traveler would have been entitled to while traveling on official business. This is generally one day before and one day after the dates of the conference/meeting. No payment will be made for personal days. Expenses associated with an employee's family and friends that travel with the traveler are not reimbursable. Sightseeing costs are also considered a personal expense and will not be reimbursed.

#### APPROVAL POLICY

##### **All Linguistics travelers:**

All travel, regardless of source of funds, must be reviewed and approved by the department head. If the department head is not available, the associate department head is authorized to give approval. The budget manager is not authorized to approve travel.

Travel approval should be obtained in advance of the trip. (Note that without advance approval neither the university nor the department has an obligation to reimburse travel expense.)

Requests for travel approval must be in writing and must include a business purpose, the level of expenditures and the source(s) of fund(s). The statement of purpose must include at a minimum:

- Start and end dates, or multiple dates when personal and professional travel are combined
- Location(s)
- Activity

- The name(s) of the organization(s) involved (no acronyms); the names and positions of individuals visited/consulted; places, monuments or institutions visited; or other descriptions as appropriate.
- A description of the activity itself. The description of the activity should be specific and mention, for example, research topic, paper title, and the like, as appropriate.
- A statement addressing the job related nature of the trip and the direct benefits derived by the university. After discussing this question at length, our faculty agreed unanimously that there is great value to our department, and hence to the university, in presenting a rich research profile to the rest of the academic world. To this end, for the faculty and graduate students alike, we consider presentation of quality research at a prominent venue such as a conference to satisfy the requirement of direct benefit to the university, and hence to require no additional justification as a business purpose.

A Travel Approval Form is available on the department intranet website. The documentation must be available for audits. Travel Approval Forms and other documents should be emailed to Linda Campbell, department manager. All Travel Approval Forms must be signed and dated by the traveler before submission. After reviewing the Travel Approval Form for completeness, availability of funds and compliance, the department manager will submit the travel approval form to the department head or associate department head for approval. Every effort will be made to process travel authorization forms as quickly as possible.

#### **Graduate Students in the Theoretical Program:**

The department often has, depending on availability, some monies for graduate student travel, to help defray some costs for travel to a conference or research site. If the student is traveling to a conference, then the student must be presenting with the poster/paper already accepted prior to application for travel funds. If the student is traveling to a research site, then prior to application the research project/site must be approved by the faculty advisor. A graduate student may submit multiple requests but priority for funding goes to first requests. All funds are awarded as reimbursements following actual expenses for the travel. All requests for funding should be submitted before the travel takes place. Funding is only available for direct costs of the actual travel (or in some cases conference registration). No per diems are allowed.

The typical maximum awards involving travel are as follows:

- \$300 to West Coast
- \$450 to elsewhere in North America
- \$600 for travel outside of North America

Graduate students should apply for funds through the Graduate Travel Committee. For 2017-18 the committee members are Scott DeLancey and Volya Kapatsinski. To apply, the traveler must submit a copy of each of the following to each member of the committee by email. All travel applications and documents should also be sent to Linda Campbell, department manager, who will need all paperwork to process reimbursements (this can be done by a "cc" on the email to the Travel Committee). Faculty advisors should always be consulted about university-related travel and research funding requests and can also be cc'd on the email.

For Conference Travel:

- Electronic copy (or scan) of the Travel Approval Form
- Title and location of conference
- Title and abstract of paper/poster
- Evidence that the paper/poster has been accepted (i.e., acceptance notification of conference with the student's name listed)
- Student email address
- A statement of confirmation that the faculty advisor approves the travel.

For Research Travel:

- Electronic copy (or scan) of the Travel Approval Form
- Brief description (~300 words) of the project, including justification for the expense
- A copy of the IRB application (or explanation of why IRB review is not required)
- Student email address
- Short statement of support from the faculty advisor.

All awards have an expiration data for use (i.e. reimbursement). Following university and federal guidelines, **all requests for reimbursement must be made within 60 days of the travel.** Failure to file for reimbursement in this period surrenders the awarded funds.

**For both faculty and graduate students in the theoretical program:**

Reimbursement or payment requests that differ substantially from the original travel authorization will follow the same procedures. The department manager will review the reimbursement request for completeness and compliance. Upon returning from trip the traveler will give the department manager the following documents. Note it is the traveler's responsibility to submit the documents for reimbursement. The department will not remind the traveler of this requirement.

- Conference Program book
- Original receipts showing proof of purchase

Reimbursements are to be submitted in a reasonable time period upon conclusion of the trip. The IRS defines reasonable as 60 days.

**Special Situations:**

- Faculty who plan to travel during the academic year when classes are in session, even though they themselves may not be teaching during the term of the planned trip, must follow the policy of the CAS Statement of Faculty Responsibility:  
<https://casweb.uoregon.edu/anon/documents/policies/faculty/facultyresponsibilities.htm>  
This policy requires faculty to make their absence from campus known depending on length of time away.
- Faculty requesting funds for travel during a sabbatical year must obtain department head approval. The Sabbatical Approval form is available on the Intranet under forms.
- A copy of the department head's Travel Approval Form must be sent to the CAS Dean's office for the Associate Dean's signature:

<https://casweb.uoregon.edu/anon/documents/policies/travel/TravelAuthforDeptHeadsandPrgrmDir.pdf>

**Audit Trail:**

Because employee travel and appropriate approval is an auditable activity, the department manager will maintain records documenting that appropriate travel approval was obtained. Typically, this documentation consists of the travel authorization form or reimbursement requests signed by the department head or the associate department head.