

TRAVEL GUIDELINES

January 11, 2022

Wisconsin Space Grant Consortium (WSGC) and First Nations Launch (FNL) awardees may incur various types of travel expenses (such as transportation, meals, car rentals, hotels, etc.) as they perform tasks and duties that support the goals and objectives of their approved project and/or program. Federal law requires awardees to adhere to the policies and procedures of the granting agency (NASA) or the grant recipient (Carthage College), whichever entity is the most restrictive. Therefore, WSGC and FNL awardees must comply with the Carthage College Travel Policy. This policy is to ensure the integrity of the reimbursement process for travel expenses, to establish a fair and honest reimbursement, and to ensure the appropriate level of review and approval for award-related travel. All expenses that are considered reimbursable are reported and recorded by Carthage College for audit purposes, as well as to comply with all local, state, and federal laws and regulations.

- **Procedures for Implementation**

- o It is the sole responsibility of all individuals who seek reimbursement for allowable travel expenses incurred in the performance of award-related activities to understand and follow this travel expense reimbursement policy.

- **Qualifications Necessary to Determine an Allowable Expense**

- o An expense must be deemed necessary and needed for a valid business purpose for the expense to occur.
- o An expense must be reasonable — not extreme or excessive — to receive reimbursement. Reasonable would be considered what would **normally** be spent in a given/specific situation.

- **Authorization to Travel**

- o Grant Travel - All grant-related travel must be submitted to and approved by WSGC during the grant application process.
- o Internship, Scholarship, Fellowship (NIF) Travel - All NIF-related travel must obtain appropriate approval by a faculty-advisor.
- o Awardees must submit a budget modification request to WSGC to obtain appropriate approval for changes to approved budgets.

- **Authorization for Travel Expenses**

- o All reimbursements for grant-related travel must be approved by the authorized organization representative, and/or faculty advisor.
- o Each awardee must pay and claim reimbursement for only their own travel expenses.

Group meal receipts must list all names included in the meal. These expenses are to be January 11, 2022 actual, reasonable, and necessary.

- o No portion of the claim shall have been provided free of charge, or previously reimbursed by WSGC/FNL, or reimbursed by a person or organization other than WSGC/FNL.
- o If a required detailed receipt is lost, a receipt affidavit must be completed, signed, and dated by the appropriate supervisor and/or faculty advisor. Missing receipt affidavits must be submitted to the office of Finance and Administrative Services.
- o The WSGC/FNL reimbursement form, along with supporting documentation, shall be submitted to the awardee's grant management page.
- o Expense reports must be submitted on a timely basis, within 30 days of travel. Any expenses incurred in a given fiscal year (July 1-June 30) must be received by WSGC/FNL on or before July 10 of the year incurred to be reimbursed. Any expenses submitted after July 10 relating to the previous fiscal year will be disallowed.
- o WSGC/FNL will not reimburse spouse or companion travel and other travel related expenses. The awardee is responsible for reporting only his/her portion of expenses.
- o Carthage College is exempt from paying Sales Tax in many states. A cost-saving step for the College will be to seek this tax relief when traveling, though admittedly this can be an onerous step.

- **Mode of Transportation**

- o In general, awardees are encouraged to travel by public transportation (bus, train, or commercial airplane).
- o When a group is traveling to the same destination at the same time, it is their responsibility to arrange for pooled transportation.
- o Mileage vs. Airfare: There are times when an awardee may elect to drive to a location for business rather than fly or use other public transportation. The awardee is limited to the lesser of the mileage or the airfare. When submitting a mileage expense, the airfare should be attached for reference. Driving mileage from a reputable online site (such as Google Maps) must be submitted for reimbursement along with the airfare quotes. The lesser of the "average of airfare" vs. mileage amount will be reimbursed.

- **Air Travel**

- o Travel by commercial air travel shall be limited to Economy Class (also known as basic or coach class) and at the lowest overall price (including seat selection unless awardee has a valid medical reason that requires a special seat assignment). Consideration should be given to fees associated with overhead storage or baggage fees.
- o Awardees should book the lowest logical airfare as far in advance as possible. Individuals should not select an airline based on their personal frequent flyer program (without regard to an individual's frequent flyer program).
- o Premium fees such as baggage fees, excess weight fee, premium seating, pre-check or pre-assigned seat assignment fees, extra leg room / exit row fees, in-flight entertainment, travel class upgrade fees, airline clubs and lounges, etc., are not reimbursable expenses.
- o Flight insurance coverage is not an allowed expense, except for international travel.
- o The awardee's original receipt for payment of the ticket and baggage fees must be

attached to the reimbursement/invoice form.

- o WSGC/FNL will not reimburse awardees for tickets purchased with frequent flyer miles even if those tickets are purchased for business reasons. Individuals can use their “personal miles” or personally buy upgrades or seat assignments at their discretion; however, these are not reimbursable by the College.
- o WSGC/FNL is not responsible for lost baggage or any fees associated with lost baggage.

- **Travel by Train or Bus**

- o Travel by train shall be limited to economy/coach, and accommodations shall be limited to the lowest cost. Receipts must be attached to the reimbursement/invoice form.

- **Taxis and Airport Shuttles**

- o Reasonable charges for taxis, rideshare services, Uber or Lyft, and airport shuttles, including tips at a maximum rate of generally twenty percent (20%) of the charge, are reimbursable when other modes of travel are not available or practical. These fees should be compared to total mileage and parking for the trip to determine the better value. When choosing between airports parking fees/mileage versus airport shuttles, the lesser cost method should be chosen. Awardee shall provide documentation supporting the choice.

- **Use of Privately-Owned Vehicles**

- o Whenever an awardee operates their personal vehicle on WSGC/FNL business, the awardee’s personal line(s) of coverage is primary. In the event of an accident or loss involving the awardee vehicle, the awardee’s coverage will be primary. There is potential for the awardee’s personal insurance deductible and limits of coverage to be placed at risk.
- o Awardees on trips that exceed 100 miles should utilize a rental car. The 100 miles refers to the cumulative mileage for the trip.
- o Use of personal vehicle requires mileage rate reimbursement not gas receipts. Standard mileage rate includes calculations for normal wear and tear on vehicle. As such, no vehicle maintenance (oil change, tires, brake work, etc.) may be submitted for reimbursement.
- o The starting point, destination, and return point must be stated daily on the travel expense form along with the business purpose of the travel.
- o Bridge and road tolls are reimbursable with an original receipt or an I-Pass statement.
- o Traffic citations, parking tickets, and other traffic violation expenses are the awardee’s responsibility and expense.

- **Rental Car**

- o Use of a rental vehicle requires rental and gas receipts, not mileage.
- o Carthage College auto insurance policies cover the insurance on rental vehicles. Additional insurance provided by rental companies is not required and will not be reimbursed.

- **Alcoholic Beverages**

- o No alcohol will be purchased and consumed when students are present at WSGC/FNL events.
- o No reimbursement is allowable for the cost of alcoholic beverages.
- o Federal regulations prohibit the College from reimbursing with federal funds any expenditures for alcoholic beverages.

- **Meals & Incidental Expenses**

- o Reasonable meal expenses incurred for meals while on College business are allowed for all actual costs (including gratuities from 15% to 20%). Detailed itemized receipts (not just the credit card payment receipt) are requested for all meal purchases. The names of the people covered on the receipt must be included and the business purpose of the expense must be stated. Names of guests and their professional affiliation must be included. The College realizes that large groups may have mandatory tipping added to the original bill and if so, this should be indicated in the receipt submission process. Review the detail of the bill prior to paying. Double tipping will not be reimbursed.
- o When meals are included in the conference registration fee, it is the expectation that the awardee would consume these meals rather than incur an additional cost to the College.
- o The allowed meal rate guideline follows general common per diem rates for a total of \$45 per diem. Awardees may utilize this amount in any fashion they choose. If traveling for only a portion of a day, typically at the start and end of a trip, the amount is \$22.50, no matter the specific hours in which travel takes place. For one-day conferences, local or regional, when meals are not provided by the conference, the College will cover up to \$20.00 for meals for the day. The College recognizes that in some cities, keeping meal expenses to \$45.00 per day will be a challenge and appreciates awardee's efforts to use College resources wisely.
- o In situations where business travel is combined with personal travel, reimbursement for meals will be limited to expenses incurred on days of official business.

- **Hotel and Motel Expenses**

- o The choice of lodging shall be based on cost with consideration given to accessibility in conducting business. Reasonable pricing for accommodations should be considered and the lowest available secured when possible (i.e. conference has lodging available at several area hotels – the least expensive should be attempted versus the most convenient or closest).
- o When an awardee is approved by his/her supervisor to attend a specific business function or conference that includes staying at a specific lodging accommodation, then the expense is allowed only if required to stay at such lodging accommodation. Any amount more than the standard room charges must be accompanied by an explanation of the reasonableness of such expense, and written authorization by the awardee's supervisor.
- o When an awardee is approved to attend a business function that does not specify the specific lodging accommodations, the awardee's lodging should be reasonable for the location.
- o If the lodging is shared, indicate the awardee's name who shared the room. One awardee will claim the entire expense.
- o All lodging expenses must be supported by the itemized hotel receipt. Additional expenses for room upgrades (king bed vs queen bed, suite vs regular room) will not be reimbursed.
- o Expenses for lodging at homes of relatives or friends are not reimbursable.
- o Reimbursable lodging expenses associated with WSGC/FNL hosted events must be affiliated with WSGC/FNL hotel block(s) and in alignment with the program events. Expenses incurred outside of these parameters without prior approval will not be reimbursed.

- **Other Allowable Expenses**

- o Other allowable expenses must be reasonable and necessary, the purpose of which should be directly related to WSGC/FNL business.
- o Allowed expenses not specifically listed in the policy may include luggage handling, parking, taxi service, business related telephone calls, internet usage, and registration fees. Receipts are required for all itemized expenses.

- **Outside Contracted Personnel Expenses**

- o Outside contracted personnel may include consultants and auditors.
- o Travel and meal expenses for outside contracted personnel are subject to the limitations imposed on WSGC/FNL awardees.
- o All travel and meal expenses incurred by outside persons contracted by the College shall be reviewed and approved by WSGC before reimbursement by the College.
- o Expenses incurred by outside contracted persons must be reasonable and necessary for the direct purpose of the contract. Documentation of expenditures to support all travel and meal expenses will be submitted to the immediate supervisor.
- o Documentation shall include the names of the individuals and companies represented, location of meeting, costs incurred, time and date.
- o Reimbursement for alcoholic beverages is not allowed.

- **International Travel**

- o International travel is not allowable under WSGC/FNL funding unless pre-approved by WSGC and the National Space Grant Office Manager.
- o International travel may not exceed \$5,000.
- o Requested foreign travel shall include justification, the purpose, location, duration, airfare and per diem for each trip.
- o A post-trip summary report that describes the benefits gained as a result of the trip are due to the WSGC program office within seven (7) business days of the trip's conclusion.