

CCE Travel Policy and Procedures

General Guidelines

- The appropriate Project Coordinator will communicate policy and procedures to all travelers for the project
- Reasonable and necessary
- For the Bard-sponsored traveler ONLY
- For the destinations and days related to Bard activities ONLY
- The most economical options REQUIRED
- Advance planning REQUIRED
- TRAVELER must submit completed reimbursement request in a timely manner; incomplete requests will be returned
- CASH ADVANCES should be kept to a minimum and advanced planning is required to meet Finance deadlines and travel dates

Passports and Visas

- Travelers are responsible for obtaining and maintaining current passport for international travel
- Visa process should start several months in advance of travel
- Bard or partner institution (depending on destination) can provide visa invitation (Scans are usually acceptable for visa applications but traveler should confirm this)
- Traveler is responsible for determining application requirements and timeline, providing Project Coordinator with all requested passport and other information, and completing application process in a timely fashion; Bard will reimburse normal visa fees only (no rush fees)

Flights

- Most economical economy itinerary booked well in advance (at least 15-30 days ahead)
- First or business class not covered
- Original boarding passes should be retained and provided to CCE or home institution
- Any special travel restrictions related to government grants (e.g. Fly America Act) must be followed
- Multiple travelers travel together whenever possible to save on ground transportation
- No additional baggage fees for more than one checked bag except for business purpose

Ground Transportation

- Public transportation to be used, if available, for individuals
- Original receipts must be retained for ALL transportation
- Coach only; business class is not covered
- Multiple travelers together may make a group Bard or private car pickup if more economical
- Group (rather than individual) pickups for multiple arrivals on same day
- Mileage for personal vehicle use is paid at the Bard business mileage reimbursement rate in effect at the time of travel

Lodging

- Campus housing whenever possible while at Bard College
- Bard Hall whenever possible in New York City
- The most economical standard single room available
- If in New York State, NYS tax-exempt form should be used
- Traveler required to provide personal credit card for incidentals
- No incidentals will be paid or reimbursed by Bard College
- Shared rooms when possible/appropriate

Food

- Campus meals will be arranged while staying on campus
- Food while traveling unless group meals are paid by Bard College
- Excessive entertainment cost must be pre-approved
- Alcoholic beverages will not be reimbursed for individual travelers
- Detailed and itemized original restaurant receipt (not just cc receipt showing the total charge) and list of those present is REQUIRED

Booking and Payment

- Handled in most efficient and economical method for each case. Options:
 - Traveler(s) book(s) with Bard travel agent, Bard approves cost and is Bard billed directly
 - Traveler(s) book(s) and pays, Bard reimburses according to Travel Policy limits after travel is completed
 - Traveler(s) book(s) and pays through home institution and Bard reimburses institution according to Travel Policy limits
- TRAVELER MUST BOOK AND PAY FOR:
 - ARRANGEMENTS MADE LESS THAN 15 DAYS BEFORE TRAVEL
 - ARRANGEMENTS INVOLVING ADDITIONAL DESTINATIONS/DAYS
 - Bard will reimburse according to Travel Policy limits upon receipt of completed reimbursement request.

BARD WILL NOT BOOK OR REIMBURSE FOR:

- Extra days or destinations beyond those needed for Bard business
- Costs incurred by traveler's failure to cancel transportation or hotel reservation
- NY State sales tax paid to places that recognize exemption
- Cost of commuting between your home and campus
- Fare or service upgrades or additional personal luggage fees
- Arrangements/changes made less than 15 days before travel (will reimburse only the prevailing economy fare in force one month before travel)
- "Preferred" or upgraded itineraries
- Any baggage fees charged beyond one bag (unless necessitated by carrying Bard materials)
- Additional costs associated with family or friends accompanying traveler, including child care
- Private car or taxi service for a single traveler when public transportation is available
- Incidentals such as room service, laundry, movies, medication
- Gasoline when mileage reimbursement is claimed
- Passport fees of any kind
- Credit card fees for cash advances
- Rush fees for Visas (several months' planning needed for these)
- Excessive food costs
- Alcoholic beverages

Reimbursement Procedures

Please note that need for detailed documentation of expenses and retention and organization of receipts is dictated by requirements from auditors and donors. Please DO NOT use the PDF reimbursement request form that can be found on the Bard Budget office website, as it does not provide the level of detail needed.

In order to receive any type of reimbursement, the Traveler must complete and submit all paperwork according to the guidelines below no later than 30 days after completion of travel. All forms and procedures will be provided to each traveler by the appropriate Project Coordinator and are also available on the CCE website.

Reimbursement to employees of certain Bard Network partner institutions are done through the home institution according to its policies, and the home institution then invoices Bard. The general guidelines below hold true in terms of expenses being reasonable and necessary, and in terms of documentation required. **NOTE:** If payment is to occur through the Traveler's home institution (Bard partner institution), please follow that institution's approved reimbursement procedure. The Project Coordinator will specify reimbursement method in each case. Home institutions will then invoice Bard CCE for all payments made on its behalf.

Submissions can be scanned (all pages scanned together as one file please) and e-mailed to the Bard representative (Project Manager) noted on the Travel Plan, but originals must be retained and forwarded to Bard at the first opportunity (another traveler can carry back to Bard).

1. Detailed and itemized original receipts required for each expense, showing vendor, date, products/services, amount in local currency; traveler must mark each receipt with a number that corresponds to list indicated in #2; small receipts should be attached to letter-sized paper (more than one can fit on a page) before being submitted.

For restaurants, both the itemized receipt showing the actual food and beverages ordered and size of party, as well as the credit card or other payment receipt, are needed. Traveler should note method of payment on the receipt (cash, personal cc, Bard cc, eg), note any gratuity added, SIGN the receipt in the case of credit card payment, and note the names of participants.

2. List of individual expenses, completed electronically in the Excel spreadsheet form provided, including the following for each expense: Receipt number (see item # 1 above), date, vendor, amount in local currency, amount in USD based on exchange rate in force on transaction date, business purpose, names of individuals involved. This spreadsheet calculates totals automatically.
3. A copy of the APPROVED project budget with the line(s) relevant to the request indicated; this will tie the expense to a specific project. relevant line indicated.
4. Completed, signed and APPROVED BARD CCE check request showing the total requested. Please note that the requested amount may be reduced for expenses deemed unallowable according to the policies outlined above.
5. Please plan ahead if cash advances are the only solution; the A/P system is on a two-week cycle. Deadlines must be met, documentation clear and complete and reconciliation submitted as soon as possible after the event.

ADDITIONAL REQUIREMENTS FOR INTERNATIONAL travelers:

5. Documents specified on the Travel Plan must be on file:
 - Scan/Copy of valid passport ID page/current US Visa/I-94 form
 - Wire information form completed electronically (for international wires)
 - Work authorization/acknowledgement (if applicable) and attachments
 - Other forms required by Human Resources (if applicable)