

Off-Campus Travel Policy **(for all travel involving students)**

Overview

Baldwin Wallace University recognizes that University business may require faculty, staff, and students to travel. This document outlines risk management and financial expectations for university-sponsored travel involving students, regardless of the source of funds, as well as those who supervise such travelers, make travel arrangements, and review, approve, or process travel-related transactions on behalf of the University. University-sponsored travel involving students falls into two categories:

Student Organization Travel: any off-campus experience that is sponsored by a recognized University student organization and supports the mission of the organization. Such travel may include field trips, retreats, conferences, competitions, workshops, and other such events. Student organization travel must be approved by the organization's faculty/staff advisor before travel arrangements are made.

Academic Off-Campus Travel: Academic Off-Campus Travel is defined as an off-campus educational experience which will enhance student's knowledge and skills and for which the Department is responsible. Travel may be credit-bearing or voluntary.

During University-supported travel, University policies for faculty, staff, and students (e.g., Student Handbook, policies on substance use, non-discrimination, and academic honesty) are still in effect regardless of the location of travel. Departments may supplement this policy with additional departmental expectations for employees and students. Similarly, federally funded awards may have additional requirements for travelers. This policy does not apply to international travel, which must be registered through the Center for Global Explorations. This policy does not pertain to internships, rotations/clinicals, and student teaching, which are arranged individually by students.

Travel and related expenditures should be authorized and spent in a manner that is responsible and consistent with university definitions of business-related expenses. Expenses that do not comply with policy are the responsibility of the traveler. Approvers of travel expenses are expected to review all the required forms for authorization and reimbursement in detail, verify the validity of the expenditures in accordance with the University policy, attest to the accuracy of the form and sign the form only if they agree with the amounts expended and/or due to the faculty or staff member.

Please contact the Office of Risk Management/Purchasing (440-826-2444) with questions regarding these policies and procedures.

Responsible Risk Management and Use of Resources

It is impossible to eliminate all risks entirely. However, planning can reduce risk and liability. Most claims against universities associated with student travel can be attributed to lack of planning, lack of supervision, and failure to enforce policies or provide proper equipment. To reduce risk:

Travel leaders should:

- Exercise good judgment and reasonable care in planning and implementing travel. A duty to provide safe conditions for traveler is expected when travel leaders know or should have known of a potentially dangerous situation.
- Supervise and prepare students for any foreseeable hazards they might encounter during travel. When faculty or staff are aware of conditions that may pose an unreasonable risk to a participant, especially those that may be unclear to a casual observer, there is greater potential for liability.

Travel participants should:

- Assume the obvious and inherent risks associated with travel.
- Follow the expectations set by travel leaders, as well as University policies.
- Recognize that deviating from group travel plans, including by using one's personal vehicle or making individual travel arrangements, means that the traveler is traveling at their own risk.

Actions Before, During, and After Travel

Before planning travel: Groups must seek approval from their advisor (if Student Organization travel) or department chair and dean (if Academic Off-Campus Travel), who will ensure the travel is an appropriate part of the organization or course.

After approval, prior to travel: Groups must identify to Risk Management their travel leader. While it is preferred that a faculty/staff advisor goes on the trip and serves as the travel leader, if the advisor is unable to travel, a student travel leader must be selected and must be in good academic and disciplinary status. If travel is over 150 miles from the University, the travel leader must stay with the group for the duration of travel and use the same means of transportation as student travelers.

If travelers are using a charter service (e.g., bus charter or travel company): The travel leader must receive approval from the Director of Risk Management and use approved charter providers.

Prior to travel: The travel leader must plan the travel, including emergency planning, and must enter travel information into the [Off-Campus Travel Registration form](#) on SoftDocs, to include travel location, dates, accommodation site, roster of participants (if travelers include students), and advisor/travel contact. Student travelers must complete the [Student Agreement/Waiver form](#). Students traveling overnight must also complete the [Trip Participant Emergency Contact Information](#) form.

While traveling: Adhere to travel plans and University expectations. Communicate with Risk Management/Purchasing in the event of an emergency.

After travel: Submit for reimbursement of permitted expenses. The University will not reimburse travel-related purchases until the travel is completed.

Planning Travel

Emergency Planning

The type, location, and duration of travel also determines the level of emergency planning needed. For example, if the trip location is remote, it is strongly recommended that at least two persons on the trip have first aid skills, a first aid kit, and a cell phone or appropriate means of communication in the event emergency aid is needed. All travelers should know how to find and use the first aid kit and what to do if separated from the group.

For Overnight or Extended Field trips, the travel leader should make sure that each traveler completes a [Trip Participant Emergency Contact Information](#) and [Student Agreement/Waiver form](#). A copy of these documents should be accessible to the travel leader, whether as a paper or electronic copy. These forms must be retained for two years (ten years for minors). Students should be reminded to carry ID and medical insurance cards.

Even with the best planning, things can still go wrong. [Quick Sheet for University Travel](#). Try to anticipate what complications could arise and develop advance contingency plans. Examples include what to do if a student needs to leave early because of a personal emergency, if a student violates established rules, and actions for weather or transportation delays or cancellations. Understand any contract limitations or restrictions. [Important University Phone Numbers](#)

Insurance and Coverage

Baldwin Wallace University is insured by United Educators insurance company. Under the definition of “Who is Insured”, employees and students are covered but only for acts within the scope of their employment or volunteer services while performing duties related to the conduct of BW business. Students are responsible for their own insurance for all travel. Baldwin Wallace University does not carry insurance for loss of or damage to personal effects during travel. Seek reimbursement through your personal insurance company if such loss or damage occurs.

Sometimes, travel hosts or event organizers require a Certificate of Insurance from the University prior to use of a facility or event participation. If asked to provide this document, the Risk Management/Purchasing Office can obtain a Certificate of Insurance for other parties.

Transportation

Air or rail travel, University motor pool vehicles, rental cars, chartered buses, and personal vehicles all are accepted travel modes for faculty, staff, and students, pursuant to the guidelines below. Travelers must use the most economical mode of transportation for the trip, including automobile or van travel within a radius of 500 miles of the University. If renting a vehicle or charter bus, please work through the Risk Management/Purchasing Department (as certain stipulations apply). Determine your transportation needs in advance to allow the Purchasing Department time to make the necessary arrangements. Methods of transportation and related stipulations are listed below:

University-Owned (Motor Pool) Vehicles

The University maintains a fleet of motor pool vehicles for business travel. To be eligible to drive a university vehicle, drivers must complete the University's Van Skills Class and possess an MVR with under 4 points. Drivers must safely operate the vehicle at all times, including adhering to posted speed limits, and will be responsible for all moving violations and parking tickets while driving a university vehicle. Any reimbursable charges accrued when using one of these vehicles (e.g., fuel, tolls, other vehicles expenses) will be reimbursed at the costs paid by the traveler. University-owned vehicles are insured under the University's auto and liability policy within the domestic U.S. for all approved drivers. Overnight travel utilizing a university-owned vehicle requires a faculty or staff member to be in the vehicle for the duration of the trip.

Rental Vehicles

When a motor pool vehicle is not available, travelers can secure a rental vehicle with advance written approval by the Risk Management/Purchasing Office. International car rentals when traveling abroad are prohibited. Rentals should be at the corporate rate or the lowest possible rate per day. Rented vehicles are insured under the University's auto and liability policy within the domestic U.S. for all approved drivers. Approved drivers who are renting a vehicle should not purchase the "collision damage waiver" offered by rental companies.

Personal Vehicles

Any vehicle not owned, rented, or leased by Baldwin Wallace University is considered a personal vehicle. Drivers must have a valid driver's license and vehicle insurance coverage as required by the State of Ohio. When using a personal vehicle for university-related business travel, the vehicle's insurance will be considered primary coverage for liability and property damage in the event of an accident. In other words, transporting University personnel and students in personal vehicles increases the driver's personal liability. The University's auto insurance program may apply only if personal insurance limits are exceeded when a fatality or extremely serious injuries occur while driving on approved University business. Mileage will be reimbursable at the rate as published by the Finance Office Travel & Expense Form. Fines for parking or traffic violations are the responsibility of the traveler and will not be reimbursed.

Air/Rail Travel

The University will cover the cost of coach class tickets. Any upgrades, enhancements, or additional travel insurance will not be reimbursed by the University. The University only allows for one checked bag per flight unless specific business reasons exist to support additional baggage.

Charter Buses

Groups of more than 12 passengers may consider the use of a commercial or charter bus service. Charter bus companies must be approved by the Risk Management/Purchasing Office prior to signing a contract; contact the Risk Management/Purchasing Office for a list of approved charter companies.

Lodging

The University will pay actual room costs at single rate accommodations, supported by an itemized hotel bill. When attending a conference, travelers may stay at the conference hotel even if it is not the most economical option available. Travelers are responsible for reserving their own accommodations and are encouraged to charge reservations using a university purchasing card. Travelers should request any available educational or corporate discounts when making reservations. The University is exempt from sales tax on items purchased in Ohio, due to BW's non-profit organization status, and travelers are required to obtain sales-tax exemption(s) where permitted. State exemptions are also available in Florida, West Virginia, New York, New Jersey, Wisconsin, and Michigan. Forms for travel in these states can be obtained in the Finance Office. It is the responsibility of the traveler to cancel any room reservation that will not be used. A record of the cancellation number should be retained in case of any billing disputes. If a traveler fails to cancel a reservation in a timely manner, they will be held responsible for cancellation fees. Employees are not permitted to share a room with a student unless the student is an immediate family member.

Meals

Individual meals will be reimbursed for reasonable meal expenses incurred while traveling or entertaining on university business. Fiscal prudence should be used. Itemized receipts are required for reimbursement or purchasing card reconciliation. Meals, including costs for food and non-alcoholic beverages may not exceed the daily amount of \$60 (including gratuities). When meals are included in the price of a workshop or conference, meals taken elsewhere are not reimbursed. Alcohol is not a reimbursable expense, except for donor-related events or dining with special guests when approved in advance by your supervisor.

Travel Emergencies

In the event of an emergency, travel leaders should first contact appropriate emergency resources (e.g., 911) and attend to the safety of travelers. Travel leaders should contact BW Safety and Security (440-826-2336) and the Office of Risk Management/Purchasing (440-826-2726) as soon as possible.

Travel-related injury or damage to university-owned property must be reported via the [Accident Report or Incident Reporting Form](#) as soon as possible. If possible, determine what conditions or acts caused the situation and the sequence of events that led to the emergency, and collect statements from witnesses.

If a claim or suit is presented on the account of wrongful death, person injury, or property damage that asserts negligence on the part of the University, United Educators will investigate and defend as necessary within the coverage terms and conditions.