Princeton University Library Travel Policy and Best Practices

Effective July 1, 2023

This policy supplements the University Travel Policy by adding additional information and rules that are left up to individual divisions or departments and highlighting areas where Princeton University Library (PUL) has seen discrepancies in the recent past. Additionally, it aims to ensure good stewardship of University resources while providing transparency, consistency, and equity in processes and supporting the productivity and safety of those traveling for PUL.

This policy applies to anyone who travels, or entertains guests, on behalf of the Library or University using PUL or sponsored research funds. Travel for sponsored research agreements or other forms of external funding may have different or additional requirements. All Library staff are expected to review and adhere to both this policy and the University Travel Policy, and to engage their supervisor or LSC representative if they have any questions.

Categories and Frequency of Travel

While the Library no longer distinguishes between different types of travel (e.g., business, professional development) as a determining factor for the amount of funding the employee will receive, it is important to categorize trips to help with budget planning and creating equitable opportunities for staff.

Starting in fiscal year 2024 (July 1, 2023), the categories are as follows:

- Conferences
- Education and Training
- Required Business
- Acquisitions

Staff may travel to up to two Conferences or Education and Training events per year. However, this is not an entitlement; managers and supervisors must still approve travel requests to ensure that it is both appropriate and strategically relevant to the Mission and Vision of the Library. Committee membership or accepted papers, presentations, or workshops do not guarantee travel support. Therefore, employees must work with their supervisor to receive approval before submitting materials to conference organizers for consideration.

Required Business travel includes travel assigned to staff by their supervisor and meetings of professional organizations to which the Library belongs, such as the Ivy Plus Libraries Consortium (IPLC), ReCAP, the Coalition for Networked Information (CNI), Center for Research Libraries (CRL), NorthEast Research Libraries (NERL), etc. Teleworkers coming to campus for all-hands meetings and staff travel for donor-related events also fall into this category.

The Acquisitions category is for trips or site visits related to collection development, for example, to evaluate items or collections for potential purchase or to accept as gifts, or to evolve collaborative collection development policies. Whenever possible, staff should seek alternative funding sources, such as from the department that will benefit from the acquisition. Collection development budgets fund this type of travel.

Planning, Approval, and Reservations

- Departments must include travel planning in their annual budget planning process. To aid in the process, and to every extent possible, Conference and Education and Training travel requests should be submitted via the Travel Requests application by June 1 of the preceding fiscal year (e.g., June 1, 2024, for travel between July 1, 2024 and June 30, 2025). For fiscal year 2024, travel requests are due by Sept 1.
- Supervisors should start planning in April for travel by their staff, based in part on annual performance goals and business needs.
- Supervisors should work to ensure equity of opportunities to travel and be mindful of the number of their staff attending the same event.
- Where appropriate, preference should be given to staff who are early in their career development.
- Staff must have an approved Travel Request before booking reservations or making other travel commitments.
  - The amounts in the Travel Request System should be as accurate as possible.
  - This includes hybrid or remote conferences, regardless of whether there is a registration cost.
- Travel and reservations should be booked as soon as possible after the approval of the request and preferably at least three months in advance to ensure the best rates. Changes to existing reservations can be made by contacting Princeton World Travel.
- Travelers must utilize Concur for booking and expense management. Booking with Concur and Princeton World Travel often provides discounts and makes changing plans more straightforward and cost-effective when necessary.
  - Exception: conference hotels may be booked directly through the conference organizer or hotel when required to receive special rates.
  - If the flight or train schedule is unavailable via Concur or costs less on another website, the employee should contact Princeton World Travel to make the reservation.
- Before traveling, all trips must be registered with the University using Enroll My Trip.
- For international travel, travelers must register with International SOS.

Modes of Transportation

- When traveling to or from the Princeton area by air, flights should be through Newark. Other airports (e.g. Philadelphia) should only be considered if they are substantially closer to home for the traveler and the total cost of travel and ground transportation are comparable.
- Travel to and from airports and during trips should be via public transit or airport shuttle, whenever possible. Car, taxi, or ride-share use is permitted if it is more cost effective or where there are convenience or safety issues that justify the additional cost.
- Air travel should be in economy class. Extenuating circumstances require pre-approval.
- Amtrak travel is only permissible when the net cost of the trip would be comparable to air travel. Amtrak travel can be business class; roomettes may be booked for overnight trips.
Payment and Per Diem

- As a guiding principle, travelers should neither gain nor lose personal funds due to Library sponsored travel.
- Princeton travel and expense ("T&E") cards must be used for payment whenever possible. When other forms of payment are necessary, expense reports should explain why this was the case.
- Itemized receipts are required for all expenses over $50 and any expenses paid using cash or personal credit cards. Receipts should include the following:
  - Merchant information - name, address, phone, etc.
  - Date of the transaction
  - Itemizations of goods/services purchased
  - Total amount paid
- The maximum allowable costs for travel are listed in the University Policy. As of July 1, 2023, these are:
  - $75 total per day for domestic trips and $125 total per day for international trips for meals and incidental expenses
  - Domestic hotels per night, before taxes:
    - $350 New York City, San Francisco
    - $300 Washington D.C., Boston
    - $250 All other U.S. locations, except Princeton
    - $190 Princeton, except during Reunion/Commencement week
  - International hotels per night, before taxes:
    - $350 Delhi, Johannesburg, London, Mumbai, Nairobi, Paris, Rome
    - $300 All other international locations
- Any spending over these amounts requires pre-approval and will generally not be supported.
- Whenever possible, travelers must leverage Princeton’s tax-exempt status and have this deducted from their expenses. The University’s Tax Exemption Number is printed on the front of T&E cards. See Sales Tax Exemptions from Finance and Treasury’s website for more about this and the necessary forms.
- Overages may not be approved and may be charged to the employee unless an extenuating circumstance applies (e.g., a canceled flight).
- Travelers must submit expense reports to their supervisor by the end of each month for provisional approval. Please note that this may be a change from past practice. Supervisors must forward approved expense reports to their LSC representative for final approval.
- The traveler’s LSC representative is ultimately responsible for all expense approvals.
- **NB:** The previous two bullets in the list above may be a change for some Library Divisions. To further clarify:
  - All expenses should be submitted at the end of each month, not per trip, and Trip IDs from the travel request should be included with individual cost items within the report.
  - Direct Supervisors are now responsible for the preliminary review of monthly expense reports. Staff should update this in Concur under "Profile Options > Expense Approvers".
  - LSC members, not their delegates, are responsible for final expense approval

While this policy covers most common travel-related questions, staff should contact their supervisor or LSC representative when questions arise. Travelers should work with Princeton World Travel when changes are necessary after reservations are made, both before and during travel. Finally, when unexpected circumstances occur and a timely decision is required, the spirit of this policy and good judgment should prevail.