SECTION 5: TRAVEL POLICIES

Last Update: 8/12/15  
Effective: 9/10/13

TRAVEL SUMMARY  
Coaches and administrative directors are responsible for securing travel for their respective unit. All individual or team travel must be approved through the normal budget development and review process.

TEAM TRAVEL GUIDELINES

1. The Head Coach is responsible for managing all members of the official travel party. All travel party members should travel as a unit to and from the competition.
   a. In special instances the head coach may approve alternate travel options for selected individuals. If an exception is approved by the head coach, the coach must have a written statement from the parent or legal guardian no later than 48 hours prior to the scheduled departure granting permission for the alternate travel arrangements. Individuals not traveling with the official travel party assume full responsibility and liability for their travel. Students who are transporting themselves to a competition site in a private vehicle may transport other students provided the coach receives a written statement from the other student’s parent or legal guardian granting permission for the alternate transportation. The student driver must complete an official travel authorization separate from the team and must include the name(s) of all passengers he or she will be transporting.

2. The Head Coach must clearly outline the appropriate attire for the situation. Remember that at all times individual student-athletes, coaches and support personnel are representing the Athletic Department and the College of William and Mary.

3. When traveling by van, bus or plane it is expected that the Head Coach will be with the team at all times. If there are extenuating circumstances and the head coach does not plan to travel with the team or must depart the site for any reason, the coach must review and have approval from their supervisor for the proposed travel coverage plan. The coverage plan must assure that there is a member of the athletic department with the travel party from the time of departure until return to campus.

4. Individuals who are injured or are not eligible for competition for any reason are generally not members of the official travel squad and should not travel.

5. A detailed listing of Guidelines for processing individual, team and recruiting travel is provided in Appendix 5-A.

PLANNING TRAVEL

It is essential for all budget managers to be proactive and organized in both projecting and planning team, recruiting, official recruit visit and individual travel. All travel arrangements must be made through the Athletics Travel Coordinator, Pete Aiello (757-221-3372). The only exceptions should be emergencies or unforeseen changes in plans. In these situations, the individual traveler is personally responsible for ensuring that all expenses are within state and athletics department expense limits.

1. As part of the budget planning process, individual units must provide line item expense figures for each proposed trip to include, but not limited to, transportation, lodging, meals, incidentals and entry fees. For assistance, review the following information and direct any questions to the Athletics Travel Coordinator, Pete Aiello (757-221-3372). As soon as possible after the need for travel is known, the traveler should submit a travel authorization form. Please see the instructions for completing this form, including required deadlines.

2. After you have received an e-mail with the approved request, contact the Athletics Travel Coordinator, Pete Aiello (757-221-3372) about transportation (including school or rental vehicles, charter buses and
flights) and lodging needs. The travel coordinator will set up a meeting if necessary to discuss, will make the arrangements based on your needs and will e-mail confirmations to you. Please be as specific as possible when communicating your needs, especially with regards to dates, times and locations.

**TRAVEL ITINERARY**

A [travel itinerary form](#) must be submitted at least 48 hours prior to travel. Essential elements of the travel itinerary include:

1. Sport
2. Destination with date of departure and return
3. Charter bus provider or airline connections where appropriate
4. Lodging accommodations with phone contact number for hotel
5. Cell phone number for head and one assistant coach, if available
6. Full list of all members of the official travel party and guests
7. Indication of all individuals included in the travel party who are traveling via alternative travel modes.

After completing this form, either save it directly to the Athletics G Drive (Temporary > Team Travel Itineraries > [specific sport], or e-mail it to the Tribe Business folder.

**EXPENSE REIMBURSEMENT**

All travel reimbursement forms will be completed by the Athletics Travel Coordinator, Pete Aiello (757-221-3372). For the specific information that is needed from the traveler, please see Appendix 5A – Travel Reimbursement Policies.

**RECRUIT VISITS-TRAVEL POLICIES**

For Official Visits:

1. **BEFORE** the Official Visit begins:
   a. Turn in the PSA Visit Form to the Compliance Office – this is the form that the Compliance Office will use to approve your Official Visit. The following blocks must be filled out in order for the Compliance Office to approve the visit:
      i. PSA Name
      ii. NCAA ID – meaning their NCAA Eligibility Center ID
      iii. Grad. Year – meaning their High School graduation year
      iv. Persons Accompanying PSA – mom, dad, brother, etc.
      v. Host Name
      vi. Official Visit box
      vii. Meals: fill out the “Tickets Requested” line ONLY
          1. You do not need to fill out the Tickets Used or the Other Meals Provided table until AFTER the conclusion of the visit
      viii. Transportation & Arrival/Departure: fill out the “Arrival Date & Time” and the “Departure Date & Time” lines ONLY
          1. For the approval, we only need to know the planned arrival and departures times; you can make an adjustment to these lines after the visit if need be.
          2. You do not need to fill out the “Travel to Campus by” line or the “W&M Provided?” question until AFTER the visit.
      ix. Lodging: you do not need to fill out anything here until AFTER the visit.
      x. Complimentary Admissions: indicate the event and the names of the people attending.
   b. The Compliance Office will review your form. We need to have this form **at least 48 hours prior** to the start of the visit.
i. If the visit is approved, we will sign it and return it to you. A signed, returned form is the trigger for you to know it has been approved – the visit may NOT start until you’ve received this form back from us.
   1. Only after the visit is approved can the Business Office book travel.
ii. If the visit is not approved, we’ll contact you ASAP and let you know what needs to be fixed.

  c. Request Student-Host Money from the Business Office
     i. Use their new form on the P&P – “Recruit Host Money Form”

2. At the beginning of the visit:
   a. Have both the PSA and the student-athlete host read the rules for visits listed on this page and the statements listed right above the signature lines.
   b. Have the student-athlete fill out the line marked “Host $ Received” with the amount of money that you give them as the student-host.
   c. Then, you, the PSA, and the student-athlete host all need to sign the form and date it under the “BEGINNING of the official visit” heading.

3. Then – **KEEP THIS FORM**

4. At the conclusion of the visit:
   a. Have both the PSA and the student-athlete host re-read the rules for visits listed on this page and the statements listed right above the signature lines.
   b. Then, you, the PSA, and the student-athlete host all need to sign the form and date it under the “CONCLUSION of the official visit” heading.

5. AFTER the visit, fill out or make adjustments to the following:
   a. Transportation & Arrival/Departure:
      i. Arrival Date & Time – if something changed from when you turned in the form to when they actually arrived on campus, just write it in. Example: 4/18/14 6:00 p.m.; Actual: 4/18/14 3:00 p.m.
      ii. Departure Date & Time – if something changed from when you turned in the form to when they actually left campus, just write it in.
         1. Remember: if they arrive earlier on campus, they may need to depart campus earlier than initially planned in order to stay within the 48 hour allowable time frame.
      iii. Travel to Campus by – indicate whether they came by plane, train, automobile, etc.
      iv. W&M provided? – check yes or no to indicate whether or not W&M paid for, reimbursed or otherwise provided the PSA for/with their transportation.
   b. Lodging:
      i. W&M provided? – check yes or no to indicate whether or not W&M paid for, reimbursed or otherwise provided the PSA their lodging.
         1. Note: if the PSA stayed on campus, check YES here
      ii. Location –
         1. On Campus – you can just indicate that it’s on campus, we don’t necessarily need to know which dorm.
         2. Off Campus – if it’s off campus, we DO need to know which hotel or other location.
      iii. Provided for (list names) – list all the names of people that you provided lodging for (e.g. PSA, mom, dad, etc.).
   c. Meals:
      i. Other Meals Provided – indicate any other meals (besides those eaten in the Dining Hall) that the PSA and those accompanying the PSA were provided.
         1. Date – indicate the date of the meal.
         2. Meal Type – indicate breakfast, lunch, dinner or brunch.
3. Location – where the meal took place (this could be a restaurant, a tailgate, etc.).
4. Provided for – list all of the names associated with the PSA’s visit for whom you provided a meal (e.g. PSA, student-host, mom, dad, etc.).
6. Then – turn the now complete form BACK in to the Compliance Office.
7. The Compliance Office will review the complete form.
   a. If everything is okay, the Compliance Office will sign it again and return it to you.
   b. If everything is not okay, the Compliance Office will get in touch with you.

For Unofficial Visits:
1. If Complimentary Admissions are NOT needed, you do NOT have to fill out this form AT ALL.
2. If Complimentary Admissions ARE needed, you DO have to fill out PART of this form:
   a. PSA Name
   b. Persons Accompanying PSA
   c. Check the Unofficial Visit box
   d. Grad. Year
   e. Sport
   f. Complimentary Admissions: indicate the names of Attendees and the event they will be attending