

General Guidance Concerning State Funded Travel – Any forms referenced in this document are not required to request professional development funds

Executive Office for Administration and Finance
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OUT OF STATE TRAVEL GUIDELINES

This bulletin supersedes Executive Office for Administration and Finance (A&F) Administrative Bulletin #8, previously issued on May 13, 1998. All state agencies in the Executive Department under the jurisdiction of an Executive Office established under M.G.L. c. 6A, § 2, including the Massachusetts Department of Transportation, must comply with the provisions of this bulletin. Any travel conducted by an appointee of the Governor, including a Cabinet Secretary, is subject to separate policies and procedures established by the Office of the Governor.

Purpose and Scope

- The purpose of this bulletin is to set forth **guidance for the conduct of all publicly funded or privately subsidized** out of state employee travel for official state business.
- All employees engaged in publicly and privately subsidized travel shall adhere to the guidance set forth in A&F Bulletin #22, Credit Card Use Policy and Procedures, as related to employee travel.
- All agencies must also follow all applicable rules of the Personnel Administrator, Operational Services Division, Comptroller (including compliance with the Expense Classification Handbook), and relevant provisions of collective bargaining agreements.
- **Secretariats are strongly encouraged to follow the guidance laid out in this bulletin when employees travel within the Commonwealth on official business.**
- Any out-of-state travel done in an official capacity must be authorized by the appointing authority, and if it is funded in part with private funding, will require an additional disclosure and a determination by the appointing authority under the state conflict of interest law.
- The prescribed forms related to these procedures are attached to this bulletin.

Travel Guidance

General

- All travel must serve a legitimate public purpose and have a direct, defined benefit to an employee's job function.
- By statute, all out of state travel paid for by the Commonwealth requires approval from the Cabinet Secretary of the applicable Executive Office. Except in extraordinary circumstances, such approval shall be in advance of the trip.
- Employees who violate the agency's travel policy will have travel privileges reviewed and may have such privileges suspended or be subject to other applicable consequences, in accordance with applicable provisions of collective bargaining agreements.

- Except in extraordinary circumstances, travel arrangements should be made far enough in advance of departure date to take advantage of discounted fares, conference lodging rates, etc. For example, flights should be booked no less than 14 days in advance of departure date.

Air and Rail Travel

- Travelers should make every effort to minimize overall cost of travel to the Commonwealth, with consideration given to alternate and off-peak travel times, overtime costs, and other relevant factors.
- The Commonwealth will pay or reimburse for only coach or economy fares.

Car Rental and Reimbursements

- Every effort should be made to use the lowest priced transportation available.
- For travel over long distances, the use of a state fleet vehicle, rental vehicle obtained through the state's statewide or other applicable contracts, or mileage reimbursement for use of personal vehicle may be allowed.
- Employees may rent a car when it is required for business purposes and there is no other less expensive means available.
- If a personal vehicle is used, reimbursement will be made after deduction for normal commuting mileage.
- For travel over shorter distances, public transportation, mass transit, and shuttle services should always be considered, when appropriate, over car rental, taxi services, and other ride sharing services.

Lodging

- The traveler should select the least expensive lodging option available, taking into account proximity to the business destination and personal safety. Lodging at the business destination shall be allowed (ex. staying at an official conference hotel).
- When booking, travelers should request all applicable government and other available discounts.

Meal Reimbursement

- Meal reimbursements shall be given in accordance with the Red Book or applicable collective bargaining agreement.
- Meals provided by lodging, conference, or host should be used when applicable as part of the trip's itinerary (ex. conference lunch, hotel inclusive meal, etc.), and no meal reimbursements shall be given for a meal that was otherwise provided or included during business travel.

Miscellaneous Expenses

- The Commonwealth shall only reimburse luggage fees of the first checked bag per traveler; the Commonwealth will not reimburse for overweight or extra bag fees. Exceptions will be granted for luggage directly related to the purpose of travel (ex. presentation materials).
- The Commonwealth will not reimburse employees for any expenses incurred for the sole benefit of the traveler. These expenses include, but are not limited to, alcoholic beverages, entertainment, newspapers, magazines, laundry services, travel accident insurance, change fees for non-emergency personal reasons and TSA Pre-Check fees.

Authorization Forms & Additional Information

All out of state travel arrangements and expenses must be detailed in the TAF. No expenses or reimbursements detailed in this form shall be approved unless they are consistent with applicable provisions of statute and this guidance.

Any state employee that is accepting any privately subsidized travel must disclose further details in a separate form to their appointing authority to comply with the state conflict of interest law. The appointing authority must make a written determination permitting such travel. [Disclosure and determination forms](#) prescribed for use by the State Ethics Commission must be used per 930 CMR 5.08(2)(d)1.

A copy of the appropriate ethics disclosure form should also be included with the TAF when private funding is anticipated. Employees should take note of additional requirements of the State Ethics Commission. For instance, extending or using travel arrangements made under these guidelines to include personal vacation plans, family members or other travel companions may be a violation of the state conflict of interest law.