

These guidelines are intended to provide Siena Heights University, the “University”, community instruction on how to organize travel in accordance with University policies and risk reduction practices. These guidelines are not intended to be all inclusive.

Definitions:

University Affiliated Travel: Any travel which utilizes University funding, sponsorship or use of the name Siena Heights University. Funding includes but is not limited to: scholarships, budgetary, payroll, reimbursement, grants, purchase card, or University cash advance.

International Travel: Any travel extending past the United States border subject to passport restrictions.

Domestic Travel: Any travel within the United States which is not subject to passport restrictions.

University Fleet: Vehicles which are owned, leased, insured or operated by the University.

P-Card: University purchase card assigned and maintained by the University Business Office.

Release, Indemnity, and Assumption of Risk Form: developed by the University Risk Management team specific to each trip which identifies known risks and provides participants with resources to make educated decisions about their own safety.

Trip Coordinator: a trip coordinator is an individual who is a full time University employee and is overseeing the University affiliated travel. The coordinator must be in attendance for the duration of the trip and is the responsible University representative for the duration of the trip, including but not limited to preparation, trip, and post follow up.

Approved Driver: University driver who is approved through Department of Public Safety as defined by current applicable insurance standards.

Travel Agency: Companies providing travel associated services which are approved for use with University funds by the University Purchasing Department.

EMS: University utilized software maintained by University Campus Event Management for University scheduling purposes including fleet vehicles.

Rental Vehicles: Motor vehicle transportation which is leased or rented utilizing University funds. Rental companies must be pre-approved by the University Purchasing Department.

Charter Vehicles: Companies providing mass transport services such as school bus or charter bus carrier. These companies must be pre-approved for use of University funds by the University Purchasing Department. Any charter vehicle service utilized for University business must register proof of insurance with University Risk Management.

Minors: For the purposes of this policy and procedure, minors are defined as anyone who is enrolled in a K-12 program, including home schooling.

Applicable University policies:

Please refer to the following University policies prior to coordinating or participating in any University sponsored trip:

- Saints guide student code of conduct https://mysiena.sienaheights.edu/ICS/icsfs/2014-2015_CodeOfStuConduct.pdf?target=255b447e-7f7a-480c-aff1-086a75640505
- University athletic policy http://shusaints.com/information/Athletic_Handbook_2014.pdf
- University travel and entertainment policy https://mysiena.sienaheights.edu/ICS/Departments_and_Offices/Human_Resources/Employee_Handbook.jnz?portlet=Documents

Timeline:

- Driver approval: one (1) week advance notice with completion of release to Public Safety for driving record history and copy of current, valid driver's license
- Fifteen passenger van driver safety course: one (1) week advance notice completion of driving record release to Public Safety for driving record history and copy of current, valid driver's license
- Domestic travel: two (2) week advance notice to allow completion of Release, Indemnity, and Assumption of Risk questionnaire
- International travel: twelve (12) week advance notice with completion of Release, Indemnity, and Assumption of Risk questionnaire
- Fleet request: submission of the on-line fleet request via EMS must be done after driver is approved by Public Safety. This is a first come first serve basis and availability varies

Forms (My Siena)

- Release, Indemnity, and Assumption of Risk Questionnaire: https://mysiena.sienaheights.edu/ICS/Departments_and_Offices/Campus_Safety/Risk_Management.jnz
- Approved driver request for driving record: https://mysiena.sienaheights.edu/ICS/icsfs/DISCLOSURE_AND_AUTHORIZATION_FOR_RELEASE_OF_INFORM.pdf?target=5eb8c0e9-5273-4827-b374-d5673bf732af
- Fifteen passenger safety course: *contact Public Safety once approved as a driver*
- Guidelines and Signatory for Use of Personally Owned Vehicles Employees/Volunteers/Students for University Business: https://mysiena.sienaheights.edu/ICS/icsfs/Guidelines_and_Signatory_for_Use_of_Personally_Own.pdf?target=025af615-aeeb-461c-9c40-cf1e11b4a947

- Travel and Entertainment Expense Form:
[https://mysiena.sienaheights.edu/ICS/Departments_and_Offices/Business_Office/Central Purchasing.inz](https://mysiena.sienaheights.edu/ICS/Departments_and_Offices/Business_Office/Central_Purchasing.inz)
- BP Fuel usage report:
[https://mysiena.sienaheights.edu/ICS/Departments_and_Offices/Business_Office/Central Purchasing.inz](https://mysiena.sienaheights.edu/ICS/Departments_and_Offices/Business_Office/Central_Purchasing.inz)
- Procurement fuel usage form:
[https://mysiena.sienaheights.edu/ICS/Departments_and_Offices/Business_Office/Central Purchasing.inz](https://mysiena.sienaheights.edu/ICS/Departments_and_Offices/Business_Office/Central_Purchasing.inz)
- Check request/Cash Advance form:
[https://mysiena.sienaheights.edu/ICS/Departments_and_Offices/Business_Office/Central Purchasing.inz](https://mysiena.sienaheights.edu/ICS/Departments_and_Offices/Business_Office/Central_Purchasing.inz)
- SHU procurement care usage form:
[https://mysiena.sienaheights.edu/ICS/Departments_and_Offices/Business_Office/Central Purchasing.inz](https://mysiena.sienaheights.edu/ICS/Departments_and_Offices/Business_Office/Central_Purchasing.inz)

Safety: The University is primarily concerned with the safety of its community members. All local, state, federal and University laws and policies are to be adhered to at all times during travel. This includes, but is not limited to, student code of conduct, faculty and staff handbook, and vehicle motor codes.

- **Severe Weather:** it is the responsibility of the trip coordinator to monitor weather conditions both prior to and during travel. The University Department of Risk Management can assist with monitoring locations and travel routes but the trip coordinator has the primary responsibility to maintain the safest travel possible including but not limited to cancellations, delays or route changes to ensure safe travel
- **Vehicle Safety:** it is the responsibility of the trip coordinator to ensure the safety of the vehicles utilized for University travel. University fleet vehicles are routinely monitored for safety precautions. The trip coordinator should perform vehicle inspections prior to and during University travel. All dangerous or worn vehicle equipment needs to be reported to University Public Safety immediately and should not be utilized for travel if deemed not safe to function. This includes personally owned vehicles (which must be properly insured and driver must be properly approved). Note: personally owned vehicles are subject to insurance claims against owner's policy
 - During inclement weather, travel safety should follow guidelines set forth by the National Weather Services. Drivers are to use extreme caution during inclement weather. When driving in treacherous weather and when conditions are deemed dangerous or unsafe, immediately cease all travel and find the nearest shelter or hotel. Notify University Public Safety of all travel changes
- **Fifteen Passenger Vans:** The University utilizes fifteen passenger vans for fleet use. Fifteen passenger vans have a high roll over risk and all drivers must first pass an on-line driver safety course. Passengers must be fully aware of the risk prior to travel (see Release, Indemnity, and Assumption of Risk release). Fifteen passenger vans must never be overloaded as this increases the roll over risk

- **Safety Belts:** All passengers must wear the vehicles safety belts; no vehicle shall transport more passengers than there are available safety belts
- **Transporting minors is prohibited**
 - Certain University programs tailored to minors will have a separate risk management process and must be properly planned and approved with the University Risk Management group for any travel
- **Driver Safety:**
 - All drivers for University travel must be pre-approved (see above timeline and forms)
 - Previously approved drivers are subject to annual renewal
 - Previously approved drivers must immediately notify the Director of Public Safety of any changes in their driving record and or status
 - Note: excessive driving infractions both moving and stationary will result in exclusion from driving for University functions
 - Travel with a group emergency contact list
 - Begin the trip well rested
 - Avoid driving when conditions are hazardous (i.e. fog, heavy rain, snow, ice, etc.) Be prepared to stop and check into a hotel when fatigue or travel conditions warrant
 - Plan routes in advance; carpool and caravan where possible
 - Divide the trip into segments, stopping for rest when necessary
 - All passengers must wear seatbelts
 - Carry at least one cell phone in each vehicle. Ensure everyone has the appropriate phone numbers and there are designated check in times
 - Limit driving during the hours between midnight and 6am. Driver fatigue is greater between these hours and extreme caution is necessary. A second person should remain awake and ride in the front passenger seat between these hours.
 - On extended trips, have at least one other approved driver in the vehicle. It is recommended drivers rotate every two hours
 - Drivers who participate in more than one event while driving on the same day should rotate on a more frequent basis to avoid fatigue
 - A passenger or second driver should ride in the front passenger seat and remain awake at all times
 - Carry a flashlight and approved fire extinguisher in all vehicles
 - Avoid taking medication prior to driving, especially if the label warns against operating a vehicle while taking medication. Be aware that some medications, both prescription and over the counter, are illegal to drive while consuming.
 - When in doubt, use common sense when you drive
 - If an accident or breakdown occurs, know and follow emergency guidelines
 - All local, state, federal and University laws and policies are to be adhered to at all times during travel. This includes, but is not limited to, student code of conduct, faculty and staff handbook, and vehicle motor codes.
 - All violations, both parking and moving, must be reported to the Director of Public Safety immediately upon receipt. Any fines are personal expenses and cannot be paid with University funds

- Reckless or careless driving is not permitted. Drivers who participate in un-safe activities will immediately lose the clearance to drive for University functions and may be subject to University discipline
- **Emergency Procedures:**
 - **If you are involved in an accident:**
 - Stop immediately in a safe location and notify the local police or call 911
 - Contact Director of Public Safety
 - Fill out a police form – retain police department information and incident report number
 - Obtain names and contact information for all witnesses
 - Document incident both in written narrative and photographs when possible
 - Do not make any statements as to who is at fault, nor should you make any offers to pay damages. Fault or legal liability will be decided by the appropriate authorities.
 - If you are driving a rental vehicle contact the rental company immediately
 - **If someone is injured in the accident:**
 - Call 911 immediately and obtain medical attention
 - Consult the injured persons medical release form for any special needs
 - Contact University Director of Public Safety
 - **If a breakdown occurs:**
 - University fleet vehicles are covered under a maintenance program. Refer to card and instructions in vehicle and/or in the key holder
 - Contact Director of Public Safety
 - If driving rental vehicle contact the rental company

Trip Coordinator Duties:

- Often handles the trip registration process
- Responsible for ensuring that all applicable University policies are adhered to
- Prepared to respond to unforeseen and emergency situations and communicate with necessary individuals or University offices
- Notify Director of Public Safety immediately of any problems or safety concerns that occur during the trip duration
- Responsible for disseminating information to trip participants, providers of transportation, activity venues, and accommodations along with University Risk Management
 - Emergency information should include trip details, participant lists, emergency contacts, potential risks, and expectations of trip participants
- Responsible for obtaining all participants' signatures of the Release, Indemnity, and Assumption of Risk forms and submitting completed/signed forms to University Risk Management prior to trip departure
- Responsible for maintaining timelines

- Ensure vehicle and other motorized transportation safety
- Responsible for adhering to all transportation guidelines including but not limited to driver selection and application
- Trip coordinators must respect and ensure confidentiality of medical and liability waivers and other sensitive information in accordance with state and federal laws
- Trip coordinators maintain travel registration paperwork during trip including (but not limited to):
 - Trip registration
 - Medical and driver liability forms
 - Contracts and itineraries
 - Receipts, invoices and other financial papers related to trip
- Trip coordinators should be fully aware of all applicable University policies and communicate appropriate information to trip participants and drivers
- Trip coordinators are responsible for monitoring safety and weather conditions and making appropriate decisions accordingly
- Should know the student code of conduct as well as any local, state, tribal and federal laws that must be followed during the course of the trip
- Maintain communication with participants to include monitoring safety and special accommodations

Domestic Travel:

1. Trip approval by appropriate supervisor in accordance with University departmental policies and procedures, which may include notifying Business Office (to include but not limited to completing purchasing processes)
2. Identify Trip Coordinator – trip coordinator should start preparing their duties
3. Complete Release, Indemnity, and Assumption of Risk Questionnaire submit to University Risk Management at a **minimum of two weeks prior** to trip department
4. Complete trip itinerary and group contact information and register with University Risk Mgt. Team
5. If using a Travel Agency the agency must be approved by University Purchasing Department and must also be registered with Risk Mgt. Group
6. Hotel and other overnight accommodations must utilize University approved resources; see University Purchasing Department
7. Secure transportation plan:
 - a. University Campus Event Management can assist with reserving University fleet vehicles. Please note that there are limited fleet resources so advance reservations are required
 - i. University fleet vehicles are prohibited from parking overnight at airports
 - b. Chartered vehicle services must utilize University approved companies and services. See University Purchasing Department
 - c. Air travel must adhere to all University policies

- d. Rental vehicle services must utilize University approved companies and services. See University Purchasing Department
 - i. When renting, purchase the optional insurance (CDW)
- o Personal vehicles must be registered. Complete Guidelines and Signatory for Use of Personally Owned Vehicles Employees/Volunteers/Students for University Business
- o Assign drivers and obtain approval. Complete the Approved driver request for driving record. A **minimum of one week prior to trip departure**
- o If using fifteen passenger vans all approved drivers must take the on line safety course and the fifteen passenger safety course. This must occur a **minimum of one week prior to trip departure**

International Travel: *be aware that due to global safety concerns some areas of the world may not be accessible for University travel purposes*

1. Trip approval by appropriate supervisor in accordance with University departmental policies and procedures, which may include notifying Business Office (to include but not limited to completing purchasing processes)
 - a. If the trip is a study abroad program there are additional requirements that must be adhered to including but not limited to Registrar Office, Office of Financial Aid etc.
2. Identify Trip Coordinator – trip coordinator should start preparing their duties
3. Re-entry to the United States may require certain vaccines prior to trip departure – see passport restrictions and CDC requirements
4. Complete Release, Indemnity, and Assumption of Risk Questionnaire and submit to University Risk Management at a **minimum of twelve weeks prior** to trip departure
5. Complete trip itinerary and group contact information and register with University Risk Mgt.
 - a. Risk management will assist with monitoring the location and global safety concerns – this must be done over the twelve week duration so advance registration is critical
6. If using a Travel Agency the agency must be approved by University Purchasing Department and must also be registered with Risk Mgt.
7. Hotel and other overnight accommodations must utilize University approved resources, see University Purchasing Department
8. If participants include international students the office of International Studies must be notified at the same time the trip is registered
9. Business Office must also be involved with the planning and preparation for purchasing options and appropriated financial record keeping
10. Secure transportation plan:
 - a. University Campus Event Management can assist with reserving University fleet vehicles. Please note that there are limited fleet resources so advance reservations are required
 - i. University fleet vehicles are prohibited from parking overnight at airports
 - b. Chartered vehicle services must utilize University approved companies and services. , See University Purchasing Department
 - c. Air travel must adhere to all University policies

- d. Rental vehicle services must utilize University approved companies and services. See University Purchasing Department
 - i. When renting, purchase the optional insurance (CDW)
 - o Personal vehicles must be registered and complete Guidelines and Signatory for Use of Personally Owned Vehicles Employees/Volunteers/Students for University Business
 - o Assign drivers and obtain approval. Complete Approved driver request for driving record. Allow a **minimum of one week prior to trip departure**
 - o If using fifteen passengers vans all approved drivers must take the on line safety course and fifteen passenger safety course. Allow a **minimum of one week prior to trip departure**

Fleet Use:

- The University is primarily concerned with the safety of its community members. All local, state, federal and University laws and policies are to be adhered to at all times during travel. This includes, but is not limited to, student code of conduct, faculty and staff handbook, and vehicle motor codes
- University vehicles assigned to individual employees can be operated by approved employee drivers only.
 - o Personal time versus University time must be clearly documented with the Human Resources Department
 - o Assigned fleet vehicles the assignee is responsible for providing maintenance to their vehicles in accordance to the University purchased maintenance program. See card and instructions from maintenance provider (in vehicle or in key holder)
 - o All repairs and maintenance must utilize the purchased maintenance program
- University fleet vehicles assigned to department or reserved for University use shall not be used for personal use
 - o When using? Assigned fleet vehicles, the assignee is responsible for providing maintenance to their vehicles in accordance to the University purchased maintenance program. See card and instructions from maintenance provider (in vehicle or in key holder)
 - o All repairs and maintenance must utilize the purchased maintenance program
- University gas credit cards are to be used for the University fleet vehicles for which the card is assigned. All receipts must be submitted monthly to the Department of Public Safety. Only fuel is to be purchased with these cards. It is the responsibility of the user to maintain the strictest of credit card safety practices. Loss of a card must be reported immediately to the Director of Public Safety
- Cell phone use: no cell phones or other equally distracting electronic devices shall be used while driving for University purposes. Electronic devices that are 'hands free', designed for driving safety, are permitted. University requires that drivers utilize good judgment and common sense while driving for University purposes
- Athletic trips are limited to 200 miles round trip for fleet use. Anything over the 200 mile radius must be chartered

- Keys will only be released to the approved driver(s)
- The approved driver is responsible to returning the fleet vehicle with a full tank of fuel and clean with no trash and debris. Fleet services is budgeted for yearly professional detailing – all other cleaning is the responsibility of the user. If the vehicle is not clean at time of pick up, notify Public Safety immediately so that the previous user can be charged for the cost of cleaning
- No smoking in University fleet vehicles

Personal Vehicle Use: Employees or volunteers may choose to use personally owned vehicles from time to time for University purposes. This may include such things as transporting students to and from activities, picking up goods/supplies or other necessary activities. The owner of the vehicle's insurance is primary in the event of an accident.

- Personal vehicles may not be used for transportation of injured persons without direct consent from the Director of Public Safety
- All drivers must be pre-approved, complete and submit approved driver request form. All personal vehicles utilized for University purposes must be registered. Complete and submit Guidelines and Signatory for Use of Personally Owned Vehicles Employees/Volunteers/Students for University Business
- All local, state, federal and University laws and policies are to be adhered to at all times during travel. This includes, but is not limited to, student code of conduct, faculty and staff handbook, and vehicle motor codes

Academic trips “field trips”: Field trips are short duration trips designed to supplement or support the academic endeavors or course work. Field trips must also adhere to the above listed guidelines. Some additional Risk reductions recommendations are:

- Try to avoid mandatory travel
- Allowing adult students to transport themselves is allowed however the students need to make their own arraignments
- Utilize University Risk Mgt. services to monitor safety of specific locations and routes

Athletic trips: Athletic trips are University trips to support the University Athletic Department and team competition. These trips must also adhere to the above listed guidelines. In some circumstances trip coordinators may be approved Athletic Graduate Assistants.