

TO: Physics Faculty
FROM: Anthony Dinsmore, Department Head
DATE: 8/4/2023
SUBJECT: Reimbursement policy for scientific visitors and hosts

Regularly scheduled seminar and colloquium speakers (not search candidates). These are speakers invited by the organizers for the regular condensed-matter and high-energy seminar series and the colloquium. We rely on the seminar and colloquium organizers to be mindful of the overall cost by, *e.g.*, not inviting too many speakers from faraway places. This allows us to operate without rigid budget caps for each series. For regular seminar and colloquium speakers who come from *outside the university*:

Lunch will be fully reimbursed for the speaker and a host (faculty, student, or other). If multiple students join, then up to 5 students will be reimbursed.

Dinner will be reimbursed fully for the speaker, and for one assigned seminar or colloquium organizer. For each dinner, the cap is \$60 per meal and the policy on alcoholic beverages (below) applies.

Spouses of visitors: their expenses are not eligible for reimbursement.

Internal speakers (those who are UMass employees): Also allowed.

There is quite a lot of detail on university policy here:

https://www.umass.edu/controller/sites/default/files/T92_031_Business_Travel_Expense_Policy.pdf

Faculty search candidates. For faculty search candidates we have a more generous reimbursement policy in recognition of the fact that search committee members are expected to attend a fair number of meals. We encourage a good welcome for our candidates. The Search committee chair should discuss these policies with Dept Head or Business Mgr.

Lunch will be reimbursed fully for the candidate and (with a cap of \$30 per person) for up to three UMass hosts. Hosts should be search committee members or others who play a role in the search.

Dinner will be reimbursed fully for the candidate, and (with a cap of \$60 per person including tip) for up to three UMass hosts. Hosts should be search committee members or others who play a role in the search. Please note the alcoholic beverage policy below.

If **students** host a meal, then up to 5 students will be reimbursed.

Spouses of faculty candidates: Expenses incurred by spouses of faculty search candidates can be reimbursed if they join a meal. Additional (*e.g.*, travel) expenses for spouses are not automatically reimbursed; such a request should be brought to the Dept. Head in advance.

Other speakers are not eligible for reimbursement from department funds: Visitors who are not part of a faculty search and not with one of the regular seminar or colloquium series described above will not generally be eligible for reimbursements from Departmental funds for any expenses. Examples include (a) visitors not during the fall or spring semester, (b) visitors primarily to a single faculty or small subgroup, and (c) postdoc candidates. Faculty are free to reimburse such visitors as appropriate from research funds including PI RTF.

University policies, esp. regarding alcohol: The UMass Amherst Business Expense Policy is summarized here (<https://www.umass.edu/controller/business-travel-expenses>) and details are here: https://www.umass.edu/controller/sites/default/files/T92_031_Business_Travel_Expense_Policy.pdf. A key point: we can only reimburse for alcohol consumed with a meal, at one drink per person or less than 25% of the total bill. You should expect to pay personally for expenses beyond that, *e.g.*, for expensive wine.

How to proceed. It is recommended that one person pay for the entire party with a personal credit card, and later request reimbursement from the other attendees and the department as appropriate. **The payment receipt, the itemized food receipt, and a list of the attendees with their affiliated institutions is required for processing.**