University of Maryland
University College

Professional Coaching Services
Solicitation #91466
January 6, 2017

Due Date for Responses: Friday, January 20 2017, 2:00 p.m. EST

Submit responses (e-mail) to: sharon.barry@umuc.edu

Sharon G. Barry
Director of Procurement, Goods and Non-technology Services
sharon.barry@umuc.edu
Telephone No.: 301-985-7156

All questions are to be submitted solely to the above mentioned person and must be submitted by January 13, 2017.
PROJECT NAME: Professional Coaching Services

1. PROJECT SCOPE:

1.1 Purpose. UMUC is seeking professional coaching services for UMUC executives and leaders on an “as needed” basis. Coaching assignments may include, but are not limited to the following:

- Professional development coaching,
- Executive coaching,
- Career coaching, and
- Leadership coaching

Multiple, non-exclusive agreements are expected to be awarded as a result of this solicitation. There is no guarantee on the amount of work assigned to any awardee. The aggregate fee for all contracts awarded as a result of this solicitation shall not exceed $100,000.00.

1.2 UMUC Background. UMUC, one of the 11 degree-granting institutions of the University System of Maryland, is a global university specializing in high-quality, career-oriented degree and nondegree programs tailored to the current workforce. UMUC is a unique institution with a unique mission. As the “Open University” of Maryland and of the United States, UMUC is committed to being the university of choice for working adults and other nontraditional students who constitute its three historic constituencies: residents of the State of Maryland; members of the U.S. Armed Services and their families; and national and international students pursuing their higher education goals online.

The University’s long-standing mission has been to offer credit-bearing educational programs to adult students in innovative modalities. At the same time, the philosophy of education for adults has demanded a continuum of lifelong learning. The response from higher education is evidenced by the emergence of self-sustaining activities focused on developing and delivering workforce training, non-credit programs, and professional development. UMUC has developed strong client relationships with many organizations in the for-profit, not-for-profit, and government realms.
2. **STATEMENT OF WORK:**

Professional coaches shall provide UMUC executives and leaders coaching services on an “as needed” basis.

**Coaching Services shall include:**
- Coaching on development and self-awareness;
- Use of psychological and self-awareness instruments as appropriate;
- Interpretation and debrief of 360 instruments;
- Development interventions or strategies as appropriate for development

Delivery of services may be face-to-face (preferred) or by phone.

**Requirements**

Coaches must possess proven coaching skills and experience and must be certified to administer development instruments and interpret psychological data. Coaches shall keep all discussions and assessment data surrounding the coaching assignment confidential. Information regarding the substance of the sessions or assessment results shall not be shared with any person without the express permission of UMUC. Coaches may work with UMUC employees to establish goals, discuss patterns, strengths, development, and help them develop a plan to achieve the goals.

3. **SOLICITATION RESPONSE REQUIREMENTS:**

**Technical**

Proposers shall submit a resume containing the following information:
- Experience,
- Professional training,
- Educational background, and
- Certifications

Proposers must also include the contact information (phone and email address) of at least 3 references. Higher education references are preferred.
Pricing

Proposers shall submit the rates in the following manner:

- Hourly, and
- 1/2 Hourly

Pre-authorized travel for the on-site review may be reimbursed pursuant to UMUC’s “Policy on University Travel,” Policy 380.10 (attached). Local travel may not be considered.

4. PROJECT SCHEDULE:

   Solicitation Issue Date: Friday, January 6, 2017

   All Questions Submitted by: Friday, January 13, 2017, 2:00 p.m. EST

   Proposal Due Date and Time: Friday, January 20, 2017, 2:00 p.m. EST

   Anticipated Award Date: TBD

   Anticipated Contract Start Date: TBD

5. TERMINATION FOR CONVENIENCE:

The University reserves the right to terminate this solicitation, in whole or in part, at its convenience.

6. PROJECT MANAGEMENT:

The UMUC Office of Human Resources will be providing management services for this Contract.

7. SUBMISSION AND EVALUATION OF THE RESPONSES:

Responses are to be provided by the due date noted above. Responses may be submitted electronically to:
Sharon G. Barry, Director,  
Goods and Non-technology Services  
UMUC Office of Procurement  
sharon.barry@umuc.edu

Responses must be submitted by an individual (or firm) who can be held responsible for all contents of the response. Further information may be requested by the University during the evaluation process.

Responses will be evaluated based on the strength of the resume as well as quoted rates. References may be contacted at UMUC’s discretion. UMUC may also use itself as a reference. The decision as to the “most advantageous” proposal is solely at UMUC’s discretion.

UMUC reserves the right to reject in whole or in part, any and all proposals without liability and/or to accept any bid in the interest of the State of Maryland.

8. RESULTING CONTRACT, NON-DISCLOSURE AGREEMENT AND WORK PRODUCT:

A University professional services agreement will be issued to the selected individual or firm. In responding to this Solicitation, proposers are accepting that they will agree to execute the attached Contract, in substantively the same form, including mandatory Terms and Conditions for contract award. As part of the attached Consulting Agreement, the awarded contractor shall be entering into a Non-Disclosure agreement with UMUC for confidentiality and protection of UMUC’s intellectual property. (Refer to Article 6 of the Agreement). The resulting contract shall be for a not-to-exceed amount. All work product and documentation shall be regarded as a work for hire and is the property of the University of Maryland University College and may not be copied or reproduced without its expressed written permission.

Enclosures: Solicitation Terms and Conditions;  
UMUC Contract, inclusive; and  
UMUC Policy on University Travel Policy 380.10

END OF SOLICITATION DOCUMENTS FOR  
Professional Coaching Services
SAMPLE CONTRACT – DO NOT COMPLETE

UNIVERSITY OF MARYLAND UNIVERSITY COLLEGE

Professional Services Agreement

CONTRACTOR:
Address:

Contact Phone:
Contact Email:

UMUC Ordering Office: Office of ___________
Project Coordinator:
Coordinator Phone:
Coordinator Email:

Procurement Officer
Phone Number:
E-mail address:
This Agreement ("Agreement" or "Contract") is made this ___ day of ______, 201__, between the University of Maryland University College ("UMUC" or "University"), a constituent institution of the University System of Maryland ("USM"), and ________ ("Contractor"), collectively the "Parties".

**Contract Documents and Term**

This Agreement consists of multiple documents as follows in the order of precedence:
- This Agreement Form and any Amendments;
- Exhibit A - Scope of Work;
- Policy 380.10 – Policy on University Travel

The initial term shall commence upon the execution of this Agreement and conclude on December 31, 2017. There are three (3), 12-month renewal options at the sole discretion of UMUC.

**Recitals.** The Contractor has been awarded a contract to provide services for UMUC upon the terms and conditions set forth herein, and the Contractor is willing to undertake those services ("the Services") upon such terms and conditions. The Contractor represents that the Contractor is professionally qualified to render the professional services required by UMUC.

NOW, THEREFORE, UMUC and the Contractor agree as follows:

**1.0 PROFESSIONAL SERVICES**

1.1 The Contractor shall begin to perform the Services as described in the Contractor’s Scope of Services, which is incorporated herein as Exhibit A to this Agreement, on the date this Agreement is signed by both Parties (the “Effective Date”) and will continue through ________. There will be ___ ( ), one (1)-year renewal options at the sole discretion of UMUC.

1.2 Services shall be performed in accordance with a schedule agreed upon by the Parties. The Contractor shall perform the Services as expeditiously as is consistent with good professional skill and care and the orderly progress of the Services. In the event of any conflict in terms between Exhibit A and this Agreement, the terms and conditions of this Agreement take precedence.

1.3 The UMUC Office of ________ will designate a staff member to act as coordinator ("Project Coordinator") between UMUC and the Contractor. Throughout the period of the Services, copies of all correspondence, work
products, specifications, estimates and other materials prepared by the Contractor should be directed to the Project Coordinator and also to any other UMUC personnel designated by the Project Coordinator. Direct contact or communication by the Contractor with other UMUC offices or any other entity concerning the Services shall be made only with the prior knowledge and concurrence of the Project Coordinator.

1.4 The professional contractor for the Services shall be the same person identified in this contract unless (a) a change is requested by the Contractor and approved in writing by the Project Coordinator; or (b) a change is requested in writing by the Project Coordinator for good cause, in which case the Contractor shall make an appropriate substitution, subject to UMUC's approval, and notify UMUC in writing. Major changes in the Contractor's organization or personnel (other than the Contractor) shall be reported to UMUC in writing as they occur.

1.5 If applicable, any amendments thereto, are made a part of this Agreement unless expressly contradicted by a term or condition of this Agreement. The Scope of Services which is set forth as Exhibit A is made a part of this Agreement.

2.0 FEES AND PAYMENTS

2.1 The maximum flat hourly rate for the Contractor's professional services is $___.00. Contractor's maximum flat rate includes all and any other type of charges or other costs in performing any services. Payments shall be made upon acceptance of deliverables as outlined in this Agreement or in work orders issued by UMUC. The aggregate fee for all services provided under this Agreement shall not exceed $______.

2.2 Payment requests (invoices) shall be submitted electronically to the Accounts Payable Department, University of Maryland University College, 3501 University Boulevard East, Adelphi, MD 20783-8002 at accountspayable@umuc.edu and the Project Coordinator.

2.3 Payment terms are Net 30 after UMUC's receipt and acceptance of invoice.

2.4 The Contractor shall furnish each invoice with the Purchase Order or Contract number clearly indicated; the type of billing, i.e., the deliverable; and, additional information as may be specifically required elsewhere in this Agreement.

2.5 No invoice will be processed if there is a dispute between UMUC and the Contractor as to the current or cumulative services provided.
2.6 UMUC's approval of periodic payments to the Contractor shall not constitute, in any sense, approval or acceptance by UMUC of the Services work performed through the date of the invoice or of the Contractor's assertion of percentage of the Services completed through the date of the invoice.

2.7 It is understood that there is no guarantee of dollar amount of work under this Contract.

2.8 As an independent contractor of UMUC, no withholding of income tax, Social Security or other sums will be made from the payment to the Contractor.

3.0 **ONSITE REVIEW MEETINGS**

If so requested by the Project Coordinator, the Contractor shall meet in-person at UMUC's offices with the Project Coordinator and other UMUC staff to discuss details relating to the required Services, for any given project or as directed by UMUC.

4.0 **OWNERSHIP OF DOCUMENTS**

4.1 For the consideration payable under this Agreement, all work product derived from the Services and required by this Agreement shall be considered a work made for hire within the meaning of that term under the copyright laws of the United States, applicable common law and corresponding laws of other countries. UMUC shall have sole right and authority to seek statutory copyright protection and to enjoy the benefits of ownership of the work. The Contractor hereby assigns all rights, title and interest in and to the work derived from the Services and agrees to require all members of the Consulting Team, as well as any agents or subcontractors of Contractor involved in Services, to agree in writing that they assign to UMUC all right, title and interest in work product derived from the Services required by this Agreement. All work product required by this Agreement shall also be protected by the attorney client and attorney work product privileges available under Maryland law.

4.2 Notwithstanding the terms of Paragraph 4.1, Contractor is permitted to retain all rights to the intellectual capital (including without limitation, ideas, methodologies, processes, inventions and tools) developed or possessed by the Contractor prior to, or acquired during, the performance of the Services under this Contract.
5.0 UMUC PROCUREMENT TERMS AND CONDITIONS

5.1 Maryland Law – The laws of Maryland shall govern the interpretation and enforcement of this Agreement.

5.2 Termination for Convenience - The University may terminate this Agreement, in whole or in part, without showing cause upon prior written notice to the Contractor specifying the extent and the effective date of the termination. The provisions of the USM Procurement Policies and Procedures, including the determination of rights and obligations of the parties, shall govern termination.

5.3 Termination for Default - When the Contractor has not performed or has unsatisfactorily performed the Services; payment shall be withheld at the discretion of the University. Failure on the part of a Contractor to fulfill contractual obligations shall be considered just cause for termination of the contract and the Contractor will not be entitled to recover any costs incurred by the Contractor up to the date of termination. The provisions of USM Procurement Policies and Procedures hereunder, including the determination of the rights and obligations of the parties, shall govern termination.

5.4 Changes - This Agreement may be amended with the consent of both parties. Amendments may not change significantly the scope of the Agreement.

5.5 Disputes - This Agreement shall be subject to the USM Procurement Policies and Procedures. Pending resolution of a claim, the Contractor shall proceed diligently with the performance of the Agreement in accordance with the Procurement Officer’s decision. Claims not resolved by action of the Procurement Officer may be reviewable by the Maryland Board of Contract Appeals in accordance with State law.

5.6 Suspension of Work - The Procurement Officer unilaterally may order the Contractor in writing to suspend, delay, or interrupt all or any part of the work for such period of time as he may determine to be appropriate for the convenience of the University.

5.7 Delays and Extension of Time - The Contractor agrees to prosecute the work continuously and diligently and no charges or claims for damages shall be made by it for any delays or hindrances from any cause whatsoever during the progress of any portion of the work specified in this Agreement.

Time extensions will be granted only for excusable delays that arise from unforeseeable causes beyond the control and without fault or negligence of the
Contractor, including but not restricted to, acts of God, acts of the public enemy, acts of the State in either its sovereign or contractual capacity, acts of another Contractor in the performance of a contract with the State, fires, floods, epidemics, quarantine restrictions, strikes, freight embargoes, or delays of subcontractors or suppliers arising from unforeseeable causes beyond the control and without the fault or negligence or either the Contractor, its subcontractors or suppliers.

5.8 Nondiscrimination in Employment - The Contractor agrees: (a) not to discriminate in any manner against an employee or applicant for employment because of race, color, religion, creed, age, sex, marital status, national origin, ancestry, or disability of a qualified individual with a disability, and (b) to post and to cause subcontractors to post in conspicuous places available to employees and applicants for employment, notices setting forth the substance of this clause.

5.9 Contingent Fee Prohibition - The Contractor warrants that it has not employed or retained any person, partnership, corporation, or other entity, other than a bona fide employee or agent, any fee or any other consideration contingent on the making of this Agreement.

5.10 Ethics - This Agreement is cancelable in the event of a violation of the Maryland Public Ethics Law by the Contractor or any University employee in connection with this Agreement.

5.11 Intellectual Property – Contractor agrees to defend upon request and to indemnify and save harmless UMUC, its officers, agents and employees with respect to any claim, action, cost or judgment for patent infringement, or trademark or copyright violation arising out of purchase or use of materials, supplies, equipment or services covered by this Agreement.

6.0 CONFIDENTIAL INFORMATION

6.1 Contractor acknowledges and understands that in connection with this Agreement, the performance of the Services and otherwise, Contractor has had or shall have access to, has obtained or shall obtain, or has been or shall be given the University’s Confidential Information (as defined herein). For purposes of this Agreement, “Confidential Information” means all information provided by the University to Contractor, including without limitation information concerning the University’s business strategies, political and legislative affairs, students, employees, vendors, contractors, student records, customer lists, finances, properties, methods of operation, computer and telecommunications systems, and software and documentation. Confidential Information includes information in
any and all formats and media, including without limitation oral, and includes the originals and any and all copies and derivatives of such information.

6.2 Contractor shall use the Confidential Information only if and when required for the performance of the Services, and for no other purpose whatsoever, and only by Contractor employees engaged in that performance.

6.3 Contractor shall not, in any manner whatsoever, disclose, permit access to, or allow use of Confidential Information to any person or entity except as specifically permitted or required under this Contract.

6.4 Contractor acknowledges and understands that UMUC is required to protect certain Confidential Information from disclosure under applicable law, including but not limited to the Family Educational Rights and Privacy Act ("FERPA"), the Gramm Leach Bliley Act ("GLBA"), or the Maryland Public Information Act ("PIA"), including regulations promulgated thereunder, as the laws and regulations may be amended from time to time (collectively the "Privacy Laws"). The Confidential Information that is protected under FERPA was provided to the Contractor as it is handling an institution service or function that would ordinarily be performed by UMUC’s employees. The Contractor agrees that it shall be obligated to protect and may only maintain and use the Confidential Information in its possession or control in accordance with the Privacy Laws to the same extent as UMUC would be obligated if the Confidential Information was in the possession or control of UMUC. The Contractor further agrees that it is subject to the requirements governing the use and redisclosure of personally identifiable information from education records as provided in FERPA.

6.5 Contractor may disclose Confidential Information as required by legal process. If Contractor is required by legal process to disclose Confidential Information, Contractor shall immediately notify the University, and before disclosing such information shall allow UMUC reasonable time to take appropriate legal action to prevent disclosure of the Confidential Information.

6.6 Contractor’s obligations with respect to Confidential Information shall survive the expiration or the termination of this Contract.

6.7 Contractor acknowledges that Contractor’s failure to comply fully with the restrictions placed upon use, disclosure and access to Confidential Information may cause the University grievous irreparable harm and injury. Therefore, any failure to comply with the requirements of this Section 8 shall be a material breach of this Agreement.
6.8 Contractor agrees and acknowledges that it is not the custodian of any Confidential Information that may be in Contractor’s possession or control. Contractor shall forward any request for disclosure of Confidential Information to:

Office of Legal Affairs  
University of Maryland University College  
3501 University Boulevard East  
Adelphi, MD 20783

6.9 Except to the extent otherwise required by applicable professional standards, the obligations under this section do not apply to information that (a) is or becomes generally known to the public, other than as a result of disclosure by Contractor, (b) had been previously possessed by Contractor without restriction against disclosure at the time of receipt by Contractor, (c) was independently developed by Contractor without violation of this Contract, or (d) Contractor and the University agree in writing to disclose. Each party shall be deemed to have met its nondisclosure obligations under this section as long as it exercises the same level of care to protect the other’s information as it exercises to protect its own confidential information, except to the extent that applicable law or professional standards impose a higher requirement.

6.10 All Confidential Information received by Contractor shall be returned to the University or destroyed upon completion or termination of this Contract.

7.0 **INDEMNIFICATION**

To the fullest extent permitted by law, the Contractor shall indemnify and hold harmless UMUC, the State of Maryland, University System of Maryland ("USM"), and their respective agents, servants and employees, from and against all claims, damages, losses and expenses, including but not limited to attorney's fees, arising out of or resulting from the performance of the Services work by the Contractor, provided that such claim, damage, loss, or expense is caused in whole or in part by any negligent or willful act or omission of the Contractor or any employee, agent or subcontractor of the Contractor. At UMUC's request, the Contractor will defend UMUC or settle any suit, claim, or proceeding brought against UMUC in relation to this contract. This obligation is not intended to be or to imply a waiver of the sovereign immunity of UMUC, USM or the State of Maryland. The University does not assume any obligation to indemnify, hold harmless, or pay attorney’s fees that may arise from or in any way be associated with the performance or operation of this Agreement.
8.0 RELATIONSHIP OF THE PARTIES

8.1 Nothing in this Agreement shall be construed to establish a relationship of servant, employee, partnership, association, or joint venture between the parties. Neither party shall bind or attempt to bind the other to any contract, warranty, covenant or undertaking of any nature whatsoever unless previously specifically authorized in writing in each instance. Nothing in this Agreement is intended to create a joint employment relationship.

8.2 It is understood and agreed that Contractor is an independent contractor of the University, and not an employee. Except as set forth in this Agreement, the University will not withhold income taxes, social security or any other sums from the payments made to Contractor hereunder. All employees or contractors of Contractor shall in no way be considered employees of the University, but rather they shall be employees or contractors of Contractor, and Contractor shall bear full responsibility for compensating those persons and for the performance of the Services by way of them.

8.3 Each party reserves the right to review all press releases or other public communications of the other party that may affect the party’s public image, programs or operations.

9.0 INSURANCE

The Contractor shall maintain in full force and effect adequate insurance coverage to protect against the risks associated with the performance of services under this Agreement. The Contractor shall also maintain in full force and effect workers’ compensation insurance as required by the laws of the jurisdiction in which the services are performed. Upon request, the Contractor shall provide the University with evidence of such insurance.

IN WITNESS WHEREOF, the parties have caused this Agreement to be executed by their authorized officers or officials.

UMUC

By: ____________________________  By: ____________________________
Laura McWeeney, Esq.
AVP, Procurement and Business Affairs

Date: ____________________________  Date: ____________________________
EXHIBIT A TO PROFESSIONAL SERVICES AGREEMENT

THIS Exhibit A to CONTRACT ("Contract") ________ is made as of this _____ day of ____________, 201_ by and between __________________________________, hereinafter referred to as "Contractor," and the University of Maryland University College (UMUC), a constituent institution of the University System of Maryland, an agency of the State of Maryland, with offices at 3501 University Boulevard East, Adelphi, MD 20783, hereinafter referred to as the "University."

Description of Scope of Work:
Policy 380.10 - Policy on University Travel

Policy 380.10 - Policy on University Travel

This replaces

File: 380.10
Date: 7/25/12

Replaces

File: 380.10
Date: 6/4/12

ORIGINATOR: Business Officer

SUBJECT: Policy on University Travel

I. Introduction

This UMUC Travel Policy provides UMUC's travel and reimbursement policy and procedures to be followed when UMUC faculty and staff travel for the purpose of engaging in official UMUC business. This policy incorporates the University System of Maryland (USM) Travel Policy VIII-11.00 and includes a link to Policy Attachment 11.10, Schedule of Reimbursement Rates.

II. Policy

UMUC will only pay for and reimburse Travelers (as defined below) for travel on UMUC matters ("UMUC Travel") when the procedures outlined below for each UMUC division are followed. The President, Provost and Chief Academic Officer, Chief Business Officer, Senior Vice President of Overseas Operations, or Senior Vice President of Partnerships, Marketing, and Enrollment Management can elect to make exceptions to the policies outlined on an as-needed basis.

III. Definitions

A. Traveler is defined as a UMUC faculty or staff member who is traveling to engage in official UMUC business. The President, Provost and Chief Academic Officer, Chief Business Officer, Senior Vice President of Overseas Operations, and Senior Vice President of Partnerships, Marketing, and Enrollment Management have the authority to designate non-UMUC faculty and staff as a Traveler within the meaning of this policy.

B. Local Travel

1. UMUC Stateside: Stateside Local Travel is defined as in-state travel. Stateside Local Travel includes travel throughout the State of Maryland as well as within the Washington, D.C., metropolitan area (for example, D.C., Alexandria, Reston and Fairfax, VA). It does not include an overnight stay.

2. UMUC Overseas Divisions: Overseas Local Travel is defined as travel which does not include an overnight stay.

C. Non-Local Travel

1. UMUC Stateside: Non-local Travel is defined as all out-of-state travel and any in-state travel which includes an overnight stay. (See B.1 above for the definition of in-state travel.)

2. UMUC Overseas Divisions: Non-local Travel is defined as travel which includes an overnight stay within the geographical areas applicable to the Division.

D. International Travel

1. UMUC Stateside: International Travel is defined as travel outside of the United States.

2. UMUC Overseas Divisions: International Travel is defined as travel to a location outside the geographical areas applicable to the Division.

E. Overseas Faculty Travel for Teaching Purposes

1. Travel outside Division sites to an Overseas teaching/working location is defined as overseas Travel.

2. Travel within Division sites is defined as intra-theater PCS Travel or intra-theater TDY Travel depending on the number of days the faculty member or staff member is assigned to the location.

IV. Approval Procedures

Obtaining Approval for Travel: For all UMUC Divisions (UMUC Stateside, UMUC Europe and UMUC Asia), the UMUC Travel Authorization Request Form is to be utilized to obtain the required pre-approval which includes the purpose of the travel and estimated cost. The form is available on the UMUC Intranet at the Travel Homepage.

A. Local Travel

1. UMUC Stateside

a. Travelers do not need to obtain formal pre-approval, but they should ensure that their direct supervisor knows of the planned travel.

b. A Traveler shall obtain prior approval from their department manager or authorized direct supervisor to use his/her personal vehicle for Local Travel.

2. UMUC Overseas

a. UMUC Asia and UMUC Europe Travelers must obtain pre-approval from their department manager or authorized direct supervisor for all Overseas Local Travel. For UMUC Asia Overseas staff (i.e., Area Director, Academic Advisors, Academic Deans and Financial Advisors) where Overseas Local Travel is an inherent part of their job function, the submission of an approved annual travel plan by the employee's department head will constitute approval of Overseas Local Travel.

B. Non-Local Travel

1. UMUC Stateside

a. Travelers must obtain written pre-approval from the appropriate department member prior to initiating Stateside Non-Local Travel arrangements or commencing the travel. Cabinet members shall obtain prior approval from their supervisor.

b. UMUC Travel funds may only be utilized for airline or train travel via coach fare. Travelers who choose to travel in a class that is more expensive than coach will be responsible for the any portion of the fare that exceeds the cost of the coach ticket.

c. Travelers who choose to extend their stay to include days prior to or following authorized business travel dates are responsible for any cost related to the extended stay as this is considered personal travel and any related costs are not reimbursable.

2. UMUC Overseas

a. Travelers must obtain written pre-approval from the Senior Vice President of Overseas Operations or designee prior to initiating travel arrangements or commencing the Overseas Non-Local Travel.
b. For UMUC Asia Overseas staff (i.e., Area Director, Academic Advisors, Academic Deans, and Financial Advisors) where travel is an inherent part of their job function, the submission of an approved annual travel plan by the Department Head will constitute approval of Overseas Non-Local Travel.

c. This approval is required even if the Non-Local Travel is at no cost to UMUC.

C. International Travel

1. UMUC State-Side: Travelers must obtain written pre-approval from the appropriate Executive Committee member, as applicable. International travel by an Executive Committee member must be approved by the President. International Travel by the President must be approved by the Chief Business Officer.

2. UMUC Overseas: Travelers must obtain written pre-approval from the Senior Vice President of Overseas Operations. International Travel by the Senior Vice President of Overseas Operations must be approved by the President.

V. Reservations and Ticketing

A. General Information: Travelers and travel arrangers should ensure that all arrangements are reasonable and appropriate and be aware that they are entitled to obtain air, hotel and rental car services at the discount rates available to the University System of Maryland or its institution. All travelers are expected to make advance bookings, using the least expensive legal fare via the most direct route (or other reasonable routing that results in a lower fare). Often, air travel is less expensive than traveling by car. All air and rail tickets must be purchased through the contract travel service vendors identified by UMUC.

B. UMUC Overseas Travelers must contact the Overseas Logistics Office for travel arrangements or to obtain prior written approval for the Traveler to make his/her own travel arrangements.

C. Travel Changes: If travel plans change, UMUC will pay cancellation penalties only when the change was made for the convenience of UMUC or necessitated by emergency circumstances. If travel plans change for the traveler’s benefit, the traveler bears the costs associated with the cancellation. The traveler (or unit) shall contact the applicable travel agency/coordinate/Logistics Office to pursue possibilities of refunds resulting from an emergency situation. Traveled the traveler is notified of an emergency situation arises such as weather delays or other delays due to airline strikes, etc., the traveler shall contact the Travel Logistics Office to coordinate flight changes and/or extend the hotel stay.

C. Reimbursement Policy

1. All reimbursement requests are to be submitted on UMUC's Expense Statement form found on the UMUC Intranet on the Travel Web site.

2. All reimbursements must be documented with actual receipts (except for meals per diem).

3. All reimbursements must be submitted within thirty (30) days of the completion of travel, unless an extension is made by the Chief Business Officer, or his designee.

D. Lodging

1. The cost of hotel accommodations will be reimbursed on the basis of receipt at the single room rate unless the room is shared by two (2) UMUC employees for whom the double occupancy rate would apply. The traveler is responsible for staying at a reasonably priced hotel.

2. Any average above the single room rate, which is a result of non-official travelers utilizing the accommodations, will be the personal financial responsibility of the traveler.

3. UMUC State-Side Travelers to UMUC Europe may stay at the Hotel Flore or Hotel Birk. UMUC State-Side Travelers to UMUC Asia must stay on the base. Exceptions must be approved in writing by the Senior Vice President of Overseas Operations prior to the travel.

C. Extended Travel

From time to time, UMUC State-Side or Overseas staff or faculty may have extended assignments at a UMUC Overseas location. The university may lease a house or apartment at an overseas location for use of the UMUC faculty or staff assigned to that location. Depending on the length of the assignment and other circumstances, the faculty and/or staff member may be responsible for the payment of rent and other related expenses.

D. Meal Reimbursement

1. UMUC State-Side

   a. The USM Chancellor and Board of Regents establish per diem rates for meal reimbursements in USM Policy Attachment VIII. 11.10 (Schedule of Reimbursement Rates). This information is available on the USM Web site. The UMUC Chancellor will review the information in the Schedule of Reimbursement Rates at a minimum during the first quarter of the fiscal year and provide the institution with a current schedule of reimbursement rates.

   b. For State-Side Non-Local Travel, the per diem rate can be increased for high cost areas as identified on the UMUC Travel Web site.

   c. A partial day's travel is eligible for the per diem rate if travel time encompasses a period of two hours before and two hours after the meal (x).

   d. Travelers cannot claim the per diem reimbursement for meals that are included under other arrangements during travel such as meals in flight, meals included in the hotel registration fee, meals purchased for the traveler by others, etc.

   e. Travelers will be reimbursed only at the per diem rate; receipts are not required. Meal reimbursement will not be reimbursed at an amount greater than the per diem per meal amount; except as provided for under policy 390.20-Official Meal Expense.

   f. International travel for UMUC Asia Travelers is reimbursed at the U.S. Department of State Meal and Incidental (MAI) rate which includes both meals and incidentals. UMUC only reimburse the meal portion of this rate. For policy on incidentals, see Miscellaneous Travel Expense below. These can be found at the UMUC Travel Web site.

   g. UMUC funds may not be used for the purchase of alcoholic beverages.

2. UMUC Overseas Divisions

   a. Travelers will be reimbursed at the per diem rates established by the Senior Vice President of Overseas Operations, as approved by the department manager or authorized direct supervisor or as necessary regardless of whether the traveler is local or non-local.

   b. Travelers will not be reimbursed for alcoholic beverages, unless pre-approved by the Senior Vice President of Overseas Operations or designee.

E. Vehicles

1. Use of State-Owned Vehicles

   a. State-owned vehicles may be driven by University System officers and the authorized institution and system personnel and only when acting within the scope of their responsibilities.

   b. Students for whom the State Treasurer has issued an insurance certificate are considered authorized personnel for this purpose.

   c. A vehicle may be considered authorized personal only when he or she is engaged in providing a service to the institution, is not paid by the institution, and is providing the service as part of a formal volunteer program.

   d. Any person driving a state-owned vehicle must have a valid driver's license, comply with all traffic laws and obtain approval as required by this Policy.

2. Personal Vehicles

   a. Personal travel on a weekday is calculated from the traveler's UMUC office location or point of departure to destination and return, whichever is closer.
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b. Local Travel on a weekend or Non-local Travel is calculated from the Traveler's point of origin.
c. No mileage will be reimbursed for travel between locations in the College Park and Largo campuses such as PG Malls, University Center, UMUC facilities located in Largo, Adelphi, USD and/or UMUC-College Park.

3. Car Rentals: When a car rental is deemed necessary and approved by the President, Provost and Chief Academic Officer, Chief Business Officer, Senior Vice President of Operations, or Senior Vice President of Financial Operations, Marketing, and Enrollment Management, the Traveler is expected to lease the least expensive car which will accommodate the trip's requirements. Travelers should take advantage of University System, Federal and State Government, and institution vendor discount rates which are available. A Traveler shall not obtain Collision Damage Waiver (CDW) car rental insurance coverage for travel within the United States. UMUC Overseas Travelers who rent a car outside the United States are to check with the Overseas Logistics Office regarding car insurance. The Traveler will be reimbursed for gas purchased at a gas station with receipts. If possible, the Traveler should fill the gasoline tank at a gas station prior to returning the car to the rental agency.

4. Taxi/Uber/ Lyft/ Ridesharing: When a Traveler is traveling via those methods, the Traveler is to provide actual receipts in order to be reimbursed.

5. Multiple travelers to one destination should carpool when feasible.

6. In the event of an accident while on University business, the Traveler must notify their supervisor and the Travel Coordinator or Logistics Office as soon as is feasible.

F. Miscellaneous Travel Expenses
Reimbursement of miscellaneous expenses such as telephone calls, laundry, valet, parking fees and the like are acceptable only as noted below.

1. Parking, Taxi/Uber/Lyft/ Telephone and Laundry Costs: These expenses will be reimbursed based on actual costs with receipt as approved: a) by the department manager or authorized direct supervisor for Local Travel and b) by the appropriate Cabinet member for Non-Local Travelers reasonable and necessary. For example, Travelers to airports should take advantage of long-term parking lots, whenever available, rather than the more costly daily garages.

2. The following are examples of expenses that will be reimbursed with a receipt:
   - Reasonable expenses for ground transportation to and from airports, railroad stations, hotels and meeting places
   - Parking fees
   - Bridge, highway or related tolls
   - Telephone calls necessary to obtain transportation and hotel reservations
   - Telephone calls allowing travelers to stay in reasonable contact with their office or family
   - Laundry service is permissible when the travel is in excess of 5 working days
   - Internet connection, fax service or other office services/supplies if needed to conduct UMUC business
   - Excess baggage charges

3. Baggage Handling Gratuity: Moderate gratuities will be reimbursed for baggage and/or when the Traveler is transporting UMUC materials and equipment. Actual receipts are not acceptable for such expenses.

VII. Travel with Non-University Employees
When non-University employees (such as spouses, children, etc.) travel with UMUC Travelers but are not serving as agents of the institution, Travelers should be careful to maintain a record of individual expenses. UMUC will not reimburse any expenses incurred on behalf of the non-University employee. Likewise, airfare or any other travel expenses that is directly billed to the institution should not include expenses for spouses.

Student Services: 1614 McCormick Drive, Largo, MD 20774
Parking Information: 3301 University Blvd. East, Adelphi, MD 20783
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