Intent: To provide an effective means for review and approval of travel and professional development within the Division of Student Affairs (DSA).

Background: Providing travel and professional development is essential to meet the University Strategic Priorities, and sometimes is also mandated in certain situations. A formal process to determine travel and professional development priorities and funding allocation will provide a clear process for requesting, reviewing, and approving professional development opportunities for Division personnel.

Accountability: Area heads are responsible for review and approval of requests from staff in their respective areas prior to submission to the Vice President for Student Affairs (VPSA) for final approval. The VPSA is responsible for VPSA office staff and the area heads.

Applicability: All areas of the Division of Student Affairs

Definition(s):

Attachment(s): University Policy on Business Travel, Travel Authorization Form, and DSA Travel Request Supplemental Information Form (located on the S Drive at S:\1 DIVISIONWIDE INFORMATION\8 PROCEDURES\Current Procedures\Final Signed PDFs\Attachments)

Procedure: Travel and professional development for Division personnel will be determined by budget and the following criteria in the order listed below. The levels are intended to help with the planning process but do not guarantee approval. Employee supervisors and area heads are responsible for reviewing supporting justification materials and determining whether requested travel is needed and/or appropriate and can be financially supported. Requests for travel that are supported by the area head will be forwarded, together with appropriate documentation, to the Vice President for Student Affairs (VPSA) for approval. International travel requires approval from the President in addition to the VPSA.

- Level 1: Mandated/System-wide meetings or required certifications
- Level 2: Expected representation/Critical training
- E.g. Involvement in professional associations when the campus is hosting an event and/or when an employee plays a significant role in the organization (i.e. Committee Chair, Officer, etc.)
- E.g. Participation in critical training events, (Database user training, Clery, FERPA, or Title IX training programs, non-mandated system-wide meetings or trainings, etc.)

- Level 3: Significant level of organizational/association involvement
  - E.g. Invited to attend for the purpose of a presentation, publication or recognition
  - E.g. Invited due to involvement with grant facilitation/management

- Level 4: Other professional development and enrichment

The following operational and/or cost-saving measures shall also be considered:
- Requesting that staff employ strategies to reduce travel-related expenses such sharing hotel rooms, transportation, minimizing meal expenses, etc.
- Office coverage
- Frequency of travel
- Relevance to employee's position
- Uniqueness of the opportunity (e.g. offered presentations, speakers, networking opportunities, location, etc.)
- Availability of alternative means to garner information (e.g. travel vs. webinar)
- Number of individuals from institution already attending
- Resource availability or competing priorities within the Division (i.e. budgetary, time commitments, etc.)
- Opportunities for either full funding or partial funding options

When travel funding and/or release time cannot be granted, area heads shall inform staff of the alternative options of utilizing vacation or compensatory time off (CTO) for missed work time (provided all operational needs can be met during their absence) and paying the travel and registration expenses personally out of pocket.

Work Time Considerations: Travel for professional conferences, meetings, or trainings may occur during work hours and also over weekends and evening hours when employees are generally not expected to work. The level of training approved will guide how the absence is managed. Listed below is a guide for practice within the DSA; exceptions must be approved in writing by the area head. If bargaining unit agreements are in conflict with the items below, the bargaining unit agreement will take precedence.

Level 1 and Level 2 Travel:
- a) Release time during normal work hours is provided (when necessary or approved ahead of time).
- b) Full or partial university funding for reasonable travel expenses may be provided.
- c) Informal time off and/or overtime/CTO for travel time outside normal work hours must be requested and approved in advance by the supervisor. In cases where travel is required, overtime/CTO will be given. When overtime/CTO consideration is given, it is only given for time spent traveling to and from the conference/meeting and time spent in formal and official activities of the conference/meeting, not including meal times.

Level 3 Travel:
- a) Release time during normal work hours is provided (when necessary and approved ahead of time).
- b) Full, partial, or no university funding for reasonable travel expenses may be provided.
- c) Informal time off and/or overtime/CTO for travel time outside normal work hours must be requested and approved in advance by the supervisor. When overtime/CTO consideration is given, it is only given for time spent traveling to and from the conference/meeting and time spent in formal and official activities of the conference/meeting, not including meal times.
Level 4 Travel:
a) Release time during normal work hours may be considered by the area head. If release time is not approved, the employee may use vacation or CTO for missed work time.
b) Full, partial, or no university funding for reasonable travel expenses may be provided.

Expectations of DSA staff representatives of CSU Channel Islands: When the University provides any consideration to employees for professional travel, employees are expected to:

- Demonstrate a high degree of professionalism in keeping with the DSA Core Values serving as a good representative of CI for the entire duration of travel.
- Engage fully in the conference, attending sessions and/or supporting the program to maximize the benefit of the professional opportunity.
- Communicate the gained knowledge/information, share the skills, techniques, and practices learned with their supervisor and appropriate colleagues.

All existing University procedures for travel related to conferences and workshops should be followed. The Travel Request Supplemental Information Form should be attached to the University’s Travel Authorization Form. Travel arrangements including non-refundable reservations should not be made until Travel Authorization Form has been signed and approved by the area head. A CIT number must be obtained before travel reservations may be confirmed in CI’s Travel Store.

Dianne Wei
Author’s name

Author’s signature

9/23/15
Date

Approved:

TONI DeBOoN
DSA Area Head’s name

9/23/15
Date

Gregory JAMMER
VPSA’s name

9/21/15
Date