



Channel Islands

CALIFORNIA STATE UNIVERSITY

## Division of Student Affairs

**DSA Area Name:** Vice President for Student  
Affairs office

**Effective Date:** July 20, 2016

**Procedure Number:** VP-p003.01

### Student Affairs Working Procedure on the Approval of Travel and Professional Development Opportunities

**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 may also be mandated in certain situations. This procedure provides a formal process for requesting, reviewing, and approving professional development opportunities for Division personnel. 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 and serve as a good University representative for the entire duration of travel.
- Engage fully in the conference, attending sessions and/or supporting the program, to maximize the benefits of the professional opportunity.
- Communicate the gained knowledge/information and share skills, techniques, and practices learned with supervisor and appropriate colleagues.

**Accountability:** Area Heads/Associate Vice Presidents (AVPs) are responsible for review and approval of requests from staff in their respective areas. The Vice President for Student Affairs (VPSA) is responsible for review and approval of requests from the Area Heads/AVPs.

**Applicability:** All staff within the DSA

**Definition(s):** N/A

**Attachment(s):** CI Travel Procedures and Regulations, CIT Request Form, CI Travel Store Handbook, International Travel Authorization, and DSA Travel Request 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/AVPs are responsible for reviewing all supporting

justification materials and determining whether requested travel is needed, appropriate, and financially feasible. International travel requires approval from the President as well as the VPSA.

All travel requests should follow the steps outlined below in this procedure.

- 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, 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 as sharing hotel rooms, transportation (i.e., utilizing a shuttle versus a rental car), 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 the 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/AVPs 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.

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 to these guidelines must be approved in writing by the Area Head/AVP. If bargaining unit agreements are in conflict with the items below, the bargaining unit agreement will take precedence.

For Level 1 and Level 2 Travel:

1. Release time during normal work hours is provided (when necessary or approved ahead of time).
2. Full University funding for reasonable travel expenses will be provided.
3. 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 situations 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.

Supervisors will determine appropriate funding and release time for all other levels of travel.

All existing University procedures for travel should be followed as well as those specifically required in the DSA. The DSA Travel Request Form should be completed for all travel. Please note international travel requires an International Travel Authorization Form as well as Presidential approval. Travel arrangements including non-refundable reservations should not be made until the Area Head/AVP signs off on the DSA Travel Request Form. A CIT number must be obtained by completing the CIT Request Form before travel reservations (domestic and international) may be confirmed in CI's Travel Store.

A Travel Expense Claim (TEC) is required after all travel. The TEC should be completed, signed, and sent to Accounts Payable even if there is no reimbursement necessary.

Routing and approval of the DSA Travel Request Form and TEC are as follows:

Staff travel:

1. Staff are to submit DSA Travel Request Form to supervisor and Area Head/AVP to secure signature approvals.
2. Once supervisor and Area Head/AVP sign, the Area Head/AVP office shall:
  - a. Provide email confirmation with scan of signed DSA Travel Request Form to traveler, requester (if applicable), and supervisor notifying them of the approval and that staff may proceed with travel arrangements.
  - b. Retain the original signed DSA Travel Request Form for one year, from the date of travel.
3. Upon return from travel, traveler completes TEC and submits to supervisor and Area Head/AVP for signature and final approval.
4. The Area Head/AVP office is to scan and save the approved TEC along with DSA Travel Request Form to the S drive. TEC and supporting documents (excluding the DSA Travel Request Form) are forwarded to Accounts Payable for final processing and payment.

Area Head/AVP travel:

1. Area Head/AVP are to submit DSA Travel Request Form to VPSA office to secure VP signature approval.
2. Once VP signs, the VPSA office shall:
  - a. Provide email confirmation with scan of signed DSA Travel Request Form to traveler and requester (if applicable), notifying them of the approval and that staff may proceed with travel arrangements.
  - b. Retain the original signed DSA Travel Request Form for one year, from the date of travel.
3. Upon return from travel, Area Head/AVP completes TEC and submits to VPSA office for signature and final approval.
4. VPSA office is to scan and save the approved TEC along with DSA Travel Request Form to the S drive. TEC and supporting documents (excluding the DSA Travel Request Form) are forwarded to Accounts Payable for final processing and payment.

Dianne Wei  
Author's name

XQ-Ne  
Author's signature

7/21/16  
Date

**Approved:**

DOROTHY AYER  
DSA Area Head's name

Dorothy Ayer  
DSA Area Head's signature

07/22/16  
Date

Wm. Gregory Sawyer  
VPSA's name

Wm. Gregory Sawyer  
VPSA's signature

8/1/16  
Date