

Professional Activity/Travel Request & Reimbursement Procedures

Information in blue italics is **only for activity/travel funded by Staff Development (SD)*

1. Identify a conference or another professional activity to sponsor or attend. Conference announcements may be found in the Staff Development Teaching Effectiveness Center, Room 800-LLRC or in division offices.
2. The District reserves the right to only reimburse employees for the most economical method of travel to a workshop/conference (e.g. mileage vs. airfare). It is the responsibility of the employee requesting to travel to investigate his/her options and to review and adhere to the District Board policy. (Refer to BP 6360 Travel at http://www.nocccd.edu/Policies/PDFs/6360_BP.pdf)
3. **Read the following conditions for Staff Development funding:**
 - *Any individual or group receiving a SD award must share the information gained at the conference/activity through a presentation for their division/department or the campus. The Staff Development Office (SDO) must be notified of the presentation prior to reimbursement. In lieu of a presentation, a brief report may be submitted to the SDO.*
 - *Applications must be complete. Incomplete applications will be returned and must be resubmitted to the SDO for the Staff Development Committee's consideration. The delay may result in not receiving Staff Development funding.*
 - *Completing and submitting the Professional Activity/Travel Request Form indicates that the individual/group acknowledges, understands and agrees to comply with the conditions for SD funding. Failure to comply with these conditions will result in ineligibility for future SD funding.*
 - *If the request is to invite a guest speaker/trainer to campus, the applicant must estimate applicable expenses on the Professional Activity/Travel Request Form (e.g. speaker fee, lodging, transportation, meals, mileage, etc.).*
 - i. *NOTE: Inviting an outside guest speaker to campus generally involves:*
 - *completing an Independent Contractor Form found on the J drive (<J:\Forms and Procedures\Independent Contractors>)*
 - *reserving a room and necessary equipment through the Master Calendar*
 - *ordering food from Sodexo (or receiving refusal from Sodexo if pursuing outside catering).*
4. Complete the "Professional Activity/Travel Request Form" located on the J drive (<J:\Forms and Procedures\Travel>).
 - A. **Add Justification**
 - i. Choose at least one of the authorized uses referenced in the California Ed Code (<http://www.leginfo.ca.gov/cgi-bin/displaycode?section=edc&group=87001-88000&file=87150-87154>) that best supports the request and the mission of Fullerton College.
 - ii. Describe the objective of the activity and how it will benefit the applicant and the college.
 - iii. *Describe how the information from the activity will be shared with the department/division or campus.*
 - iv. Paste a link to the conference/activity website (if available/applicable).
 - v. *Provide any additional information that the Staff Development Committee (SDC) should consider in their evaluation of the activity/conference.*
 - vi. *Initial to confirm that the applicant has read, understands and agrees to the conditions for Staff Development funding.*

5. Save the form as attendee's last name_ conference name_date (month and year) of conference (e.g. mattson_ACCCA_0211).
6. Route the form as an email attachment to attendee's immediate management supervisor (when applicable) and dean. *The dean will route the form to the Staff Development office (staffdev@fullcoll.edu) for the SD Committee's review.* If not requesting funding from Staff Development, the dean will route the form the appropriate VP for approval and the VP will return it to the division office.
7. *The SDC will only review activity/travel requests during their regularly scheduled meetings which generally meet on the 2nd and 4th Monday of each month during the fall and spring semesters.*
8. *The maximum award amount is \$1000 per individual, per year for full-time employees. For Adjunct Faculty, the maximum award amount is \$500 per individual, per year. However two or more employees or a campus group may request more than the maximum award by proposing to sponsor a guest speaker or trainer that may be of interest to a larger group on campus. If inviting an outside speaker to campus, see 3.i. above.*
9. *Once the SDC reviews and recommends that funds are awarded, the Dean that oversees the SD budget will route the Professional Activity/Travel Request Form to the appropriate VP for approval. The VP will return the approved Professional Activity/Travel Request Form to the SDO for processing.*
10. *The SDO will process all requisitions (RQs) for SD sponsored activities/travel and will notify the applicant and his/her IMS and Dean of the VP's approval and when the purchase order (PO) has been issued. **Please do not incur any travel-related expenses before a PO is issued by the District.*** RQs for activities/travel NOT funded through SD will be processed by the applicant's division office.
11. **Pre-activity/travel payments:** Generally, staff pay registration and related expenses in advance and are reimbursed by the District. *However, to find out what the District might be able to pay in advance, contact Wendy Bailey (x25005) at least five weeks in advance of activity/travel.*
12. **Upon completion of activity/travel:** Submit a "Travel Expense Report", found on the J drive at <J:\Forms and Procedures\Travel> even when there are no out-of-pocket expenses. The employee should submit the travel expense report with other documentation (noted below) *to Wendy Bailey (x25005) for activity/travel funded by Staff Development* or to his/her division (department) office staff for all other activity/travel. *Reimbursement requests funded by Staff Development must be submitted within 30 days of the completion of travel or by June 10th, whichever comes first. Failure to comply may result in the loss of funding and disqualification from SD funding for the following year.* For all other activity/travel, the employee should check with their division office for reimbursement request deadlines.

IMPORTANT: Errors or omissions generally cause delays in getting reimbursed so please refer to the steps that follow. Contact Wendy Bailey at x25005 for assistance, if needed. Please refer to Board Policy 6360 for complete travel reimbursement policies, <http://www.nocccd.edu/Policies/PDFs/6360.BP.pdf>.

1. Record the itemized expenses on the Travel Expense Report.
2. Attach the conference flyer (including agenda) and original registration receipt indicating that payment has been received.
3. If claiming transportation, the itemized original receipt indicating that payment has been received must be attached.
4. If claiming lodging, the itemized original receipt must be attached.
5. Note that there are maximum amounts for meals posted on the District's webpage as well as a list of high/low per diem cities: <http://www.nocccd.edu/Departments/FandF/Accounting.htm>. Meals included as part of the conference fee will not be reimbursed.
6. Only mileage in excess of regular commute miles will be reimbursed.
7. Original receipts are required for all other expenses including parking, shuttle/taxi/cab and rental car.