

## **POLICY ON PROFESSIONAL TRAVEL**

Professional travel should promote the professional development of the individual and enhance the interests of the University. (This policy deals only with professional, not personal, absences from campus. See also "Faculty Absence from Campus", CSUF Faculty Handbook.) The information which follows is intended to provide a general guide to policies and procedures affecting professional travel.

The University has limited resources for faculty and administrative professional travel. Absence from campus for professional purposes with pay, and/or reimbursement for travel expenses are allowable only when the individual is absent to engage in professional activities related to his/her position. The use of these resources is subject to State regulations and procedures. Adherence to the travel regulations will help protect the individual's personal interest in Worker's Compensation, death benefits, etc. when engaging in professional activities related to his/her position away from the campus.

Travel funds for faculty are administered by School Dean who are responsible for keeping within budget limits and for adhering to State and University policy. Specific information about travel details is available from the Dean, Academic Resource Office, or Travel Office, depending upon the nature of the question.

For purposes of this policy, professional travel is defined in two broad categories, instructional and non-instructional.

### **INSTRUCTIONAL TRAVEL**

Faculty are reimbursed for personal expenses for the following types of instructional activities.

1. Travel requests and claims for student teaching supervision are processed through the Office of the Dean of the School of Education and Human Development.
2. Expenses incurred in regularly scheduled off-campus instruction where program needs require that instruction be held at an off-campus site, are reimbursed pursuant to normal State regulations. Travel from home to an off-campus site in Fresno in lieu of travel to the campus will not be reimbursed.
3. Supervision of work experience and internships, where frequent and regular visitation are required by the individual, may be authorized for reimbursement.
4. Expenses for field trips which represent a primary and substantial portion of a course and which are basic to the content of a course, may be authorized for reimbursement. Expenses for occasional field trips which constitute an enrichment rather than a basic component of the course normally are not reimbursed.

Instructional travel is not subject to the provisions of the remainder of the policy. The Department Chair or School Dean should be contacted for specific information and authorization of reimbursement for instructional travel.

## **NON-INSTRUCTIONAL PROFESSIONAL TRAVEL**

Examples for non-instructional professional travel include trips for the purposes of attending discipline-based conferences, presenting papers at professional meetings, attending workshops, seminars, or classes, and participation in scholarly organizations.

**APPROVAL OF TRAVEL REQUESTS.** All travel and campus absence for professional purposes during the academic year (calendar year for twelve-month appointees) must be approved prior to the travel or campus absence. The approval is not expected during leaves of absence without pay. All requests must be submitted on designated forms, justified by the established criteria, and approved by the Department Chair and School Dean.

Decisions on travel requests and campus absence, including funding, normally are made at the School and Department levels. Therefore, each Department or School should develop flexible, consistent procedures including a system for screening travel/absence requests, evaluating such requests, and approving or denying them. In order to assure flexibility, School and Department procedures shall not establish specific limitations on the total duration of travel taken by a faculty member but shall provide for the review of each travel request, based on the reasonableness related to the type of travel requested, and in light of the criteria outlined below.

The procedures shall include, at a minimum, the following provisions:

1. All faculty professional travel and campus absence for professional purposes must be approved in advance by the Department Chair and School Dean.
2. Requests for professional travel and campus absence shall be evaluated on the basis of
  - (a) the relationship between the proposed travel/campus absence and the individual's position responsibilities;
  - (b) the professional value of the proposed activity;
  - (c) the frequency and duration of the individual's travel and absences from campus;
  - (d) the benefit to the individual's discipline, department, and University; and
  - (e) the provision for maintaining the quality and continuity of instruction in the person's classes and other responsibilities associated with his/her position.

**OUT OF STATE TRAVEL.** If state funds are requested for out-of-state travel, justification on the request form must explicitly meet at least one of the following criteria required by the State of California.

1. The trip is to a meeting of a professional organization or society to deliver a paper, serve as a moderator or group leader, serve on a panel, or fulfill obligations as an officer in the association or society.

2. The trip has, as its primary purpose, the recruitment of faculty or administrative personnel.
3. The trip is certified in advance by the President or designee to be essential to the normal operation of the University.

If, once approved, the requested travel is not taken, the individual must notify the Department Chair and School Dean so that any funds set aside for that purpose may be disencumbered.

**TRAVEL REIMBURSEMENT.** Travel reimbursement takes the general form that

1. a Travel and Mileage Application form is completed in advance, including the necessary signatures for approval,
2. the travel occurs, and
3. a Travel Expense Claim is completed and submitted for reimbursement.

The Business Office cannot make reimbursement for travel unless travel forms have been completed in full. Receipts, vouchers, faxes, and similar documentation must accompany the Travel Expense Claim form.

**Three types** of travel expenses are reimbursed:

- (a) Subsistence expenses consist of charges for meals, lodging, and incidental expenses. Subsistence expenses are normally reimbursed according to an established schedule of allowances.
- (b) Transportation expenses consist of charges for commercial carrier fees, private vehicle mileage allowance (see below), emergency repairs to State vehicles, parking fees, bridge or road tolls, necessary taxi, bus or streetcar fares, and all other charges essential to transportation to and from the University.
- (c) Business expenses consist of the charges for business telephone calls and telegrams and all other charges necessary to the completion of the official business function.

**USE OF STATE VEHICLE/PRIVATE MILEAGE.** In order to drive a State vehicle and/or receive mileage reimbursement for the use of a private vehicle, the individual must have completed a Defensive Driver Training Course within the last four years. To receive reimbursement for the use of a private vehicle, moreover, certification of adequate insurance coverage must be on file with the Business Office in advance of the travel.

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Approved by the Academic Senate  
Approved by the President  
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