MEMORANDUM

DATE: May 15, 2009

TO: Academic Affairs Leadership Council
   CSUSM Faculty

FROM: Emily F. Cutrer
      Provost and Vice President for Academic Affairs

SUBJECT: Academic Affairs Travel Authorization Information

Last fall, in compliance with State and CSU directives, the University implemented the requirement that all domestic travel must be approved by the respective division’s Vice President and all international travel must be approved by both the respective division’s Vice President and the President (in addition to the unit-level approvals). This systemwide requirement was instituted in response to the current fiscal crisis, when all public agencies are working in an environment where operations and expenditures are subject to a higher level of review and scrutiny. Now more than ever, it is incumbent upon each of us to ensure all paperwork and documentation is complete, accurate, and easily understood in order to explain the purpose of an expenditure and how it relates to the mission of the University.

I appreciate the efforts you all have made to adjust to this new requirement. I also recognize that faculty and staff have done their best to ensure that “Requests for Travel Approval” forms include all of the necessary information and supporting materials to allow me to make an informed decision. In some instances, however, requests for additional information have been necessary to clarify the purpose of a trip or the funding source. These situations have helped us realize that the preparation of a travel authorization form isn’t as straight forward as we originally thought. Thus, to assist you in completing the travel authorization requests and determining what information is necessary to include, my office has prepared a one-page set of guidelines. These guidelines, which are attached, are intended to assist travelers in preparing travel requests, to prevent the process from becoming more time-consuming than necessary, and to avoid excessive supporting documentation.

My goal remains to act on travel requests as quickly as possible. If you have questions regarding the division travel approval process, please contact Anthony Glasgow, Academic Affairs Resource and Operations Manager, at x4059 or email aglasgow@csusm.edu.

EFC/mab
Attachment
1. Be sure that the “Request for Travel Approval” authorization form is completely filled out.

2. In accordance with CSU travel regulations, all required authorizations should be obtained prior to the traveler incurring any expenses associated with the trip.

3. The purpose of the trip must be clearly stated. If there is not enough room on the travel authorization request form, please attach a brief memo explaining the purpose of the travel.

4. Purpose of travel:
   - If the traveler is attending a conference, the name of the conference should be provided (avoid using acronyms in lieu of organization names), as well as information about whether the traveler is presenting at the conference. If presenting, no further information is necessary.
   - If the traveler is not presenting at the conference, there should be some explanation about how attendance will contribute to the traveler’s professional development (i.e., meeting with collaborators, talking to publishers, etc.).
   - If the purpose of the trip is research or creative activity, please provide a brief description of the project and the connection of the travel to completion of the project, i.e., to visit an archive, conduct fieldwork, exhibit or perform a work of art, etc. Usually a brief paragraph will suffice.
   - If the purpose of the trip is training, explain why it is necessary to travel to complete the training, and, if more than one individual is involved, please explain why it is necessary to send more than one person.

5. Funding:
   - Clearly indicate the amount of funding the traveler is expecting.
   - Indicate the source of the funding. Although a completed travel request will show account numbers, please indicate as well if the funding source is a grant, faculty development funds, start-up funds, etc. (under current guidelines, even grant-supported travel must receive full sign-off).
   - If the expense will be reimbursed by another organization, please indicate this on the “Request for Travel Approval” form. The form is still required to be completed and processed for authorization before the trip begins in order for insurance coverage to be in effect.

6. Approvals:
   - The subdivision manager (college/unit dean, AVP, director) should review and approve the “Request for Travel Approval” form prior to its being submitted for the Provost’s review and action.
   - A trip should not be initiated without obtaining prior authorization from the Provost for domestic travel or from the Provost and the President for international travel (in addition to the unit-level approval).
   - Allow sufficient lead-time in advance of the trip for obtaining unit-level approval, Provost’s approval, and if necessary, President’s approval. A good guideline would be to allow at least 3 – 5 working days for each level of approval.