

Mt. San Antonio College

Professional and Organizational

Development

## Conference & Travel Process and Sample

**Documents**

##### STEP 1 – POD CONFERENCE & TRAVEL FUNDING: PRIOR TO TRAVEL

Employee

* Download and review the POD Conference and Travel Funding Process
* Funding is up to $1800 per employee, per fiscal year

Employee

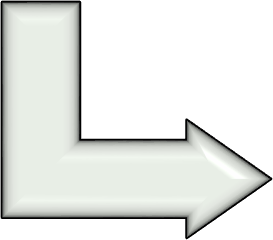
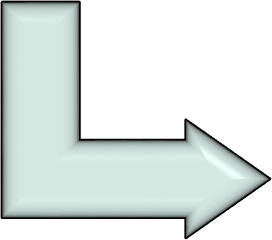
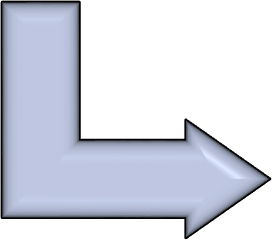
* + Fill out top part (A) of the Mt. SAC Conference and Travel Request/Expense Claim Form. Make sure **all signatures** are on form

Employee

* + Fill out POD Conference

Funding Application

* + Gather Support Materials



Employee

To POD

* Turn in completed Application.
* PDC will review applicaton and contact you with status

 **Prior to Travel**

**CONFERENCE AND TRAVEL REQUEST/EXPENSE CLAIM FORM**

Log No.:

For Fiscal Services Use Only Return to: Ext: Bldg:\_

Completed Prior to Sending to Fiscal Services

✔ Classified

SFull-TimeAFaculty

MWill POD fundPs be used?

LNo cost to tEhe District

Part-Time Faculty Management No

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name: | Joe Mountie | | **A#** | 01234567 |
| Home Address: | 1100 N. Grand Ave. Walnut CA, 91789 | | Dept.  Name | Marketing |
| Conference Name: | | Building a Better You Institute | | |
| Conference Location:  City & State | | San Francisco, CA | Dates: | July 12-14, 2018 |

✔ Yes

Date received from POD:

(Fiscal Services use only)

**CONFERENCE AND TRAVEL REQUEST/BUDGET (Completed Pre-Travel)**



✔ Commercial Air

✔ Housing P-Card to be Used

District Vehicle\*

Automobile Rental

✔ Meals Bus Van Truck

✔ Private Automobile

✔ Registration $

540.00

Use of District Credit Card for District Vehicle Fuel Only

**\*Requires separate request not to be included in estimate.**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Fund | Org | Account | Program |  | Amount $ | Budget Department/Program | Date |
| 1234 | 123456 | 521000 | 123456 |  | $ 540.00 | Marketing | 08/18/17 |
| POD: xxxx | xxxxxx | 521000 | xxxxxx |  | $ 1,072.00 |
|  | $ 1,612.00 |
| **TOTAL** | | | | |  |  |

I recommend approval of the above request. To the best of my knowledge, expenses will not exceed available funds.

Professional & Organizational Development Management (POD) / Date (If Applicable) Immediate Manager’s Approval / Date

President or Vice President / Date

Date of Board Approval

Attach a copy of the Board Approval for out of country travel

**CONFERENCE AND TRAVEL EXPENSE CLAIM (Completed Post-Travel)**

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **TRANSPORTATION** |  | | Date | | Date | | Date | | Date | Date | Amount of Pre- Payment (P-card or District CC) | Total Expense Amount to be Reimbursed |
| Date (mm/dd/yyy) | |  | |  | |  | |  |  |
| Airfare (must submit receipt)  Car Rental (must submit receipt) Private Automobile: Number of Miles  0.535 per mile  Taxi/Shuttle Parking  Lodging – **Room & Tax only** broken down by day (must submit itemized hotel bill)  \*List  Breakfast Lunch Dinner | |  | |  | |  | |  |  | $  $ | $  $  $ 0.00  $ 0.00  $ 0.00  $ 0.00  $ 0.00  $ 0.00  $ 0.00 |
|  | |  | |  | |  |  |
| $  $  $  $  $  $ | | $  $  $  $  $  $ | | $  $  $  $  $  $ | | $  $  $  $  $  $ | $  $  $  $  $  $ |  |
| $  $  $  $  $  $ |
| **HOUSING** |
| **MEALS** |
| **Total per day**  **$30 per diem w/o itemized receipts** | | $ | | $ | | $ | | $ | $ | $ 0.00 | $ 0.00 |
| **OTHER** | Registration Webinar  Other | | $  $  $ | |  | |  | |  |  | $  $  $ | $ 0.00  $ 0.00  $ 0.00 |
|  | |  | |  |  |
| $ | | $ | | $ | $ |
| **TOTAL & DISBURSEMENT** | \*Please submit original, itemized receipts | | | | | | | | ***Total Expenses:*** | | $ 0.00 | $ 0.00 |
| Disbursement by Account: | | Fund | | Org | | Account | | Program |  | **Grand Total Expenses:** | $ 0.00 |
|  |  |  |  |  | |  | |  |  | Amount: | $ |
|  |  |
|  | |  | |  | |  | |  |  | Amount: | $ |
|  |  |  |  |
|  | |  | |  | |  | |  |  | Amount: | $ |
| I hereby certify that the above expenses were incurred while on official business.  Claimant’s Signature: Date: Immediate Manager’s Approval: \_ Date:  Professional & Organizational Development Signature: Date: | | | | | | | | | | | |

CONFERENCE FUNDING APPLICATION

**GENERAL INFORMATION**

**POD Conference Funding is available for travel to conferences and workshops.**

Requestor Name: Joe Mountie

Title & Department: Coordinator, Marketing

Phone/Extension:

1234

Email: [jmountie@mtsac.edu](mailto:jmountie@mtsac.edu)

Courses you regularly teach at Mt. SAC: N/A (Classified Employee)

Department/Division Office Contact: John Lewallen

Phone/Extension:

1234



**\*\* GROUP APPLICATION (3 or more employees attending the same conference)**

* + Please submit your applications together. Each employee completes a Conference and Travel Claim Form

and a POD Conference Funding application but **only*ONE*** justification statement needs to be submitted.

* + In your group justification statement please include each person's name and their role.
  + Explain how expenses will be shared and note if there is a group conference rate.
  + Describe how your group will work together (pre-conference meeting, coordination plan, post-conference meeting, etc).

1. **FUNDING**
   1. Up to $1800 per year is available per person. How much are you requesting?

**Provided estimate: $** 1072.00

* 1. Are you requesting funds for this conference from other sources?

Sa~~mple~~

**Other Funding Source:** 12345 123456 251000 123456

**Other Funding Estimate: $**

540.00

###### PROFESSIONAL DEVELOPMENT PLAN ALIGNMENT

Check all that apply. If your conference does not align with the professional development plan, please check other and explain. **PROFESSIONAL DEVELOPMENT PLAN 2016-2018**

|  |  |  |
| --- | --- | --- |
| **ORGANIZATIONAL DEVELOPMENT** | **EMPLOYEE DEVELOPMENT** | **INSTRUCTIONAL DEVELOPMENT** |
| * 1.1 CUSTOMER SERVICE   1. TECHNOLOGY SKILLS   2. STATE/FEDERAL TRAINING REQUIREMENTS   3. STUDENT SUPPORT | * 2.1 EMPLOYEE ENGAGEMENT * 2.2 LEADERSHIP DEVELOPMENT | * 3.1 TEACHING/LEARNING BEST PRACTICES   1. TEACHING WITH TECHNOLOGY   2. STUDENT SUCCESS/SUPPORT SERVICES |

Other (Please explain):

###### FUNDING CRITERIA

Funding is competitive. Please check **ALL** of the criteria options that support that apply.

The activity supports ongoing required certification or mandated training.

* The activity supports the improvement in skills or knowledge required of my job.

The activity supports skill development required for a recently acquired position or release time position, new college planning goal, or area of need identified in PIE.

* The activity supports staying current in my field.

I have been selected to present at the conference through a competitive process or formal invitation (or have applied to present).

I would be serving as a formal representative of Mt. SAC at this conference.

The activity supports a campus plan or strategic goal where other professional development funds are not available or sufficient.

I am accompanying students to an academic or professional event or conference.

I am attending as part of a team from Mt. SAC (General justification statement must address the need for team participation).

1. **JUSTIFICATION STATEMENT**
   1. **JUSTIFICATION STATEMENT**

Describe sessions you will attend, material you will present (if applicable), and how you plan to apply and/or how you will disseminate your learning experience back on campus. Also, please provide a detailed rationale for hotel need if your conference is within a 25 mile radius of Mt. SAC.

Write statement here.

SAMPLE STATEMENT: The institute will have various sessions to attend. My goal is to attend the sessions that promote how to engage students, managers, and peers in a positive way. For example,positive team building, new technology for engaging students etc. My expectation is to provide guidance and support on implementing the updated information and current information provided at the institute.

Sample

1. **OUT OF STATE OR INTERNATIONAL TRAVEL – ADDITIONAL CRITERIA *(if applicable)***

The Professional Development Council supports *essential* out-of-state and international conference and travel activities and asks funding applicants to reflect on the necessity of these requests and then provide additional information to the Council for funding consideration. Please check the items below which apply to this request and add supplemental materials to your packet, as requested.

I have been selected or tasked to attend this particular conference on behalf of Mt. SAC (include email from individual who made the assignment or minutes from the appropriate committee meeting).

I have been selected to present at this conference through a competitive selection process (include letter from organization in packet).

I was invited to be a featured or keynote presenter at this conference by the hosting organization (include letter of invitation in your packet).

I will be the sole manager, staff, or faculty member accompanying students who are representing Mt. SAC at this event or conference.

There is no in-region or online means to access the unique, essential content I will receive through on-site participation at this conference (Please add a justification statement summarizing similarly themed in-state and/or domestic conferences you explored but will not attend and a rationale that explains the unique attributes of your selected conference).

Other rationale (please add a justification statement supporting your need for out-of-state or international travel).

Write statemSent here.

# ample

1. **OUT OF STATE OR INTERNATIONAL TRAVEL JUSTIFICATION STATEMENT *(if applicable)***

###### PRINT SUPPORTING MATERIALS

Please provide the following Information along with this completed application. ***Support materials must be included for your application to be forwarded to PDC for review.***

* 1. Conference Overview/Brochure
  2. Date(s), Time(s), Location
  3. Agenda (If no current agenda is available, use agenda from last year’s conference)
  4. List which meals are included
  5. Cost of registration
  6. Lodging costs
  7. Any other information pertaining to travel reimbursement

###### SIGNATURE

I understand that application for funding does not guarantee approval.

I am aware that the legitimacy and merit of the conference is reviewed by PDC in relationship to my role as an employee.

I certify that I have attempted to utilize other available resources for this travel prior to submitting this request.

**Applicant**S**Signature:**

# ample

2018 Building a Better You Institute San Francisco, CA

July 12-14, 2018

Registration Flight

Taxi Mileage Parking Meals Hotel



$540

$340

$90 (Hotel is about 15 miles from airport)

$36 (to and from Airport)

$66

$200.00 (Lunch and snack will be provided)

$139.00 per night plus taxes and fees (3 days/ 2 nights)

*($340 estimated)*

Estimated Total: $1,612

<http://www.betteryou.org/events/2018-betteryou-institute>



**MT.SAC**

**Mt.San Antonio College**



**M E M O R A N D U M**

Date: May 16, 2017

To: Professional Development Council From: Joe Mountie and Team

cc: Team member A, Team Member B, and Team Member C

Subject: Group Justification Statement for Funding for Building a Better You Institute

The members of the Mt. SAC Team are requesting POD funding to attend the Building a Better You Institute at San Francisco City College on July 12-14, 2017. The Mt. SAC team is the college's primary team to make Mt. SAC a better place. We accept referrals of students of concern who need inspiration. We receive 6-10 student referrals per month. The reasons for referral vary from concerns regarding need for greater creativity and motivation, etc. Please visit [http://www](http://www/).mtsac.edu/inspiration for more information on the Mt. SAC Team.

One of the tasks of the Team is to conduct a campus assessment of each referral to inform Student Life of a student who might need closer monitoring. The National Building a Better You Institute is sponsoring a conference July 12-14, 2017.One of the major activities at the Conference is training and certification for team members in working with students. This is a very important certification which will allow us to become more proficient and accurate at supporting students to be more motivated in their daily lives. Additionally, Day 1-2 is best practices training in happiness intervention. I began as Chair as the Mt. SAC Team only 9 months ago. Other members of the team have been participating longer, however, no one has attended formal training since the Team's inception several years ago. Training for work with students is long overdue. We need to keep up with the latest in best practices and we need to be certified in working with students.

National Building a Better You Institute encourages team attendance and participation as evidenced by the registration fee structure. To maximize the registration fee of $3,000,we can send up to 4 individuals. Four have expressed interest in attending: Member A, Member B, Member C, and myself, Joe Mountie. The composition of this team is faculty, management and classified staff. This brings valuable differing perspectives to our team and when we return each team member will have a different role in sharing information on campus and training colleagues in their constituency groups. Team planning meetings will take place before, during, and after the conference to maximize our learning opportunities.

The Mt. SAC Team does not have a budget of its own, therefore we are requesting POD funding to cover our registration costs, mileage, and lunch for the training days. We are requesting $4,400 total for 4 individuals to attend. The group registration fee is $3000. Team members will share rooms, so anticipated lodging is only $600. Travel and food is expected to be $800. On behalf of Joe Mountie and Team we thank you for consideration of our request. Please feel free to contact me at x6044 if you have questions or concerns.

**STEP I – POD Conference & Travel Funding Process Checklist: Prior to Travel**

<http://www.mtsac.edu/pod/conference-and-travel/forms.html>

**Please note:** Forms must be filled out correctly or they will be considered incomplete and will be returned to you

PRIOR TO TRAVEL:

* DOWNLOAD THE POD CONFERENCE FUNDING PROCESS GUIDELINES

FILL OUT THE 2 TOP SECTIONS OF THE MT. SAC CONFERENCE & TRAVEL REQUEST/EXPENSE CLAIM FORM:

* Employee Name
* A#
* Home Address
* Department Name
* Conference Name
* Conference Location: City & State
* Date(s) of Conference
* Check your Position
* POD Fund to be used
* Check Expensed needed
* Add Account(s)
* **Signatures:** Immediate Manager, President or Vice President & Dates
* COMPLETE POD CONFERENCE FUNDING APPLICATION:

POD funding Application can be found through the following link:

<http://www.mtsac.edu/pod/documents/conference_travel/POD_C_T_Application_rev_8-15-17_Fillable.pdf>

* SUPPORTING MATERIALS NEEDED WITH FORMS:

|  |  |
| --- | --- |
| * Conference Overview (Flyer) | * List Which Meals are included |
| * Date(s), Time(s), Location Lodging Costs | |
| * Cost of Registration Agenda (Can be the tentative agenda or last | |
| \*A lot of the information might be on flyer or Conference Overview Description. Highlight information needed. | |

* + Any other information regarding travel

year’s agenda)

TURNING IN APPLICATION TO POD:

* APPLICATION MUST BE TURNED **AT LEAST** FOUR (4) WEEKS PRIOR TO CONFERENCE

\**Application does not guarantee approval*

PDC will review documents, make a decision, and contact you with application status

**Step II – POD Conference & Travel Funding Process Checklist: After Travel**

<http://www.mtsac.edu/pod/conference-and-travel/forms.html>

**Please note:** Forms must be filled out correctly or they will be considered incomplete and will be returned to you

ATENDANCE VERIFICATION

* + INCLUDE A DOCUMENT TO VERIFY YOUR ATTENDANCE AT THE CONFERENCE:

**\****You cannot request Professional Growth Increments/Benefits for any activities/events supported through college funding.*

COMPLETE BOTTOM PART OF CONFERENCE & TRAVEL REQUEST/EXPENSE CLAIM FORM

|  |  |
| --- | --- |
| * Transportation \* | * Other (registration, etc.) |
| * Meals \*\* Right column total expense | |
| * Housing  Signatures: Claimant’s Sign | |

s

ature, Immediate Manager, and Dates

**\****If you are driving your own vehicle mileage is paid “IN EXCESS” of what you normally drive to/from Mt. SAC.*

**\*\****If you do not submit itemized receipts for meals you will be paid at the $30 per day rate. A credit card receipt for a meal is not sufficient documentation; it must be itemized.*

COMPLETE POD CONFERENCE EVALUATION

* + PROFESSIONAL & ORGANIZATIONAL DEVELOPMENT EVALUATION REPORT

The POD Conference Evaluation Report is completed online and can be found through the following link:

<https://app.smartsheet.com/b/form/ce0171fa5f3d420187137bdc70c1013b>

SEND ALL COMPLTED FORMS AND ORGINAL RECEIPTS TO POD

* + POD WILL REVIEW AND SUBMIT APPROVED EXPENSES TO FISCAL SERVICES FOR REIMBURSEMENT

**After Travel**

Log No.:

T1234567

For Fiscal Services Use Only

**CONFERENCE AND TRAVEL REQUEST/EXPENSE CLAIM FORM**

Return to:

Ext: Bldg:\_

Completed Prior to Sending to Fiscal Services

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name: | Joe Mountie | | **A#** | 01234567 |
| Home Address: | 1100 N. Grand Ave. Walnut CA, 91789 | | Dept.  Name | Marketing |
| Conference Name: | | Building a Better You Institute | | |
| Conference Location:  City & State | | San Francisco, CA | Dates: | July 12-14, 2018 |

✔ Classified Full-Time Faculty Will POD funds be used?

Part-Time Faculty Management No

✔ Yes

**CONFERENCE AND TRAVEL REQUEST/BUDGET (Completed Pre-Travel)**



No cost to the District

Date received from POD: (Fiscal Services use only)

✔ Commercial Air

✔ Housing P-Card to be Used

District Vehicle\*

Automobile Rental

✔ Meals Bus Van Truck

✔ Private Automobile

✔ Registration $

540.00

Use of District Credit Card for District Vehicle Fuel Only

**\*Requires separate request not to be included in estimate.**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Fund | Org | Account | Program |  | Amount $ | Budget Department/Program | Date |
| 1234 | 123456 | 521000 | 123456 |  | $ 540.00 | Marketing | 08/18/17 |
| POD: xxxx | xxxxxx | 521000 | xxxxxx |  | $ 1,072.00 |
|  | $ 1,612.00 |
| **TOTAL** | | | | |  |  |

I recommend approval of the above request. To the best of my knowledge, expenses will not exceed available funds.

Professional & Organizational Development Management (POD) / Date (If Applicable) Immediate Manager’s Approval / Date

President or Vice President / Date

Date of Board Approval

Attach a copy of the Board Approval for out of country travel

**CONFERENCE AND TRAVEL EXPENSE CLAIM (Completed Post-Travel)**



Date Date Date Date Date Amount of Pre-

Payment (P-card or

Total Expense Amount to be Reimbursed

Date (mm/dd/yyy)

07/12/17 07/13/17 07/14/17

District CC)

Airfare (must submit receipt) $ $

Car Rental (must submit receipt) $ $

Private Automobile: Number of Miles $

0.535 per mile

16.00 16.00 17.12

Taxi/Shuttle $

48.20 $ $

50.00

$ $ $ $

98.20

Parking $

18.00 $

18.00 $

18.00

$ $ $ $

54.00

Lodging – **Room & Tax only**Sbroken

# AMPLE

down by day (must submit itemized hotel

bill)

\*List

$ 172.60 $

172.60

$ $ $ $ $

345.20

Breakfast $ $ $ $ $ $ $

0.00

Lunch $ $ $

15.32

$ $ $ $

15.32

Dinner $

**Total per day**

28.67 $

19.26

$ $ $ $ $

47.93

**$30 per diem w/o itemized receipts**

$ $ $ $ $ $

0.00 $

0.00

Registration $

540.00

$ $ 540.00

Webinar $ $ $

0.00

Other

$ $ $ $ $ $ $

0.00

\*Please submit original, itemized receipts ***Total Expenses:*** $ Disbursement by Account: Fund Org Account Program **Grand Total**

**Expenses:**

* 1. $

$

1,117.77

1,117.77

I hereby certify that the above expenses were incurred while on official business.

Amount: $

Amount: $

Amount: $

Claimant’s Signature:

Date:

Immediate Manager’s Approval: \_ Date:

Professional & Organizational Development Signature:

Date:

Employee

* + - Provide attendance verification

Employee

•Fill out top part (B) of the original Mt. SAC Conference and Travel Request/Expense Claim Form with T # from Fiscal Services

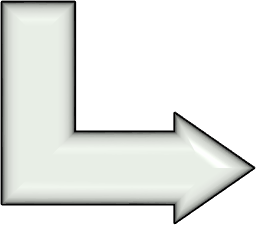
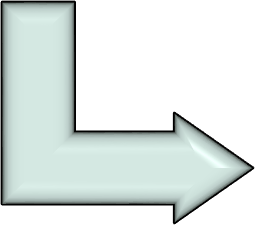
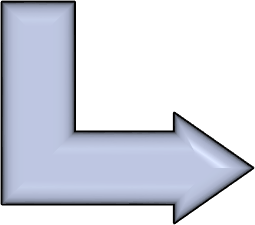
•Include all original itemized reciepts for all reimbursements

•Your signature and immediate

Manager/Supervisor required

Employee

* + - Complete POD Conference Evaluation Report online



Employee To POD

•Turn in completed Application; **Incomplete forms will be returned to you**

•POD reviews and submits approved expenses to Fiscal Services for reimbursement

1. **Am I guaranteed $1800 per year conference and travel funding?**
   1. **NO**. Application for POD funding does not guarantee approval. The Professional Development Council reviews and votes on each individual application using the Funding Criteria, justification statements, and supporting documents.
2. **Can I combine multiple sources for funding and/or apply for multiple sources at the same time?**
   1. **YES**. Please note this in section 1.B. of the application as an “Other Funding Source”.
3. **Can I request funding from POD for a repeat conference (one I was funded for in a previous academic year)?**
   1. **YES**. In your justification statement, please describe how repeat attendance at the conference this year is of benefit to your role at the college and how it is different from your past attendance.
4. **What should I include in my Out of State or International Travel Justification Statement?**
   1. PDC supports Mt. SAC’s commitment to environmental sustainability. Please explain why traveling out of state or internationally is a necessity. Is there a regional conference that could be attended instead? If you are traveling to a common tourist destination, is there a full daily schedule of conference activities that you will attend? If you have previously received funding for out-of-state or international travel, what documents can you attach to show the impact of your prior travel on the college?
5. **Can I get reimbursed after the fact for a conference I attended?**
   1. **NO.** POD Conference and Travel Funding is not retroactive. All applications for POD funding must be turned in at least four weeks prior to the conference.
6. **If I attended a conference using POD funding earlier this fiscal year, can I apply again for use of the funding?**
   1. **YES.** Employees may apply multiple times for use of POD funds until they reach the $1800 threshold for the fiscal year.
7. **Can I attend a conference as part of a group? (Groups - 3 or more)**
   1. **YES**. In some cases, coordinated group conference attendance benefits the college. If you are attending as a group, please submit your applications together. Each applicant completes a Conference and Travel Claim Form and a POD Conference Funding application but only one justification statement needs to be submitted. In your group justification statement please include each person’s name and their role. Explain how expenses will be shared and note if there is a group conference rate. Describe how your group will work together (pre-conference meeting, coordination plan, post-conference meeting).
8. **Can I use POD funding to attend a vendor fair or pay my tuition or fees to enroll in an educational program or class elsewhere (such as for a certification?**
   1. **Highly unlikely.** POD Conference and Travel funding does not support off-campus training, attendance at vendor events, participation in trade shows, or tuition and fees for other educational institutions. However, if there are exceptional circumstances necessitating your participation, the Council will review all requests.
9. **How much can I spend per day on my meals?**
   1. If you do not submit itemized receipts for meals you will be paid at a rate of $30 per day. If you exceed this amount you must submit itemized receipts. A credit card receipt for a meal is not sufficient documentation; it must be itemized. Alcohol cannot be included.