

## PROFESSIONAL & ORGANIZATIONAL DEVELOPMENT

### CONFERENCE FUNDING APPLICATION & GUIDELINES

Please be aware that for the Academic Year 2014-15, the budget and approval process for conferences and travel using unrestricted general funds has been moved from the President's Office to Professional & Organizational Development (POD). Approximately \$1500 per approved person until all funds are exhausted for the 2014-15 fiscal year. Employees may apply multiple times until they have reached the \$1500 threshold. Please follow these procedures to submit conference and travel requests funded with POD Conference & Travel Budget. This process is composed of two (2) steps: Step I is completed before conference and travel occurs. Step II is completed after conference and travel has occurred. Parts I and II are required for approval and full reimbursement of expenses.

#### STEP I: COMPLETE TWO FORMS

1. **COMPLETE CONFERENCE AND TRAVEL REQUEST/EXPENSE CLAIM FORM**- signed by the manager and Vice President (if out of state travel). Submit to POD for Professional Development Council (PDC) review.
2. **COMPLETE THIS POD CONFERENCE FUNDING APPLICATION & GUIDELINES FORM** -- submit this document to Professional & Organizational Development (POD).

***POD Conference & Travel requests must be approved by the assigned manager and Vice President prior to being submitted to the POD Office. Requests must be received at least four weeks prior to the start of the conference. Employees will need to demonstrate that the purpose of attending the event will lead to professional development.***

***The Professional Development Council (PDC) meets the first Thursday of each month. All requests must be received by POD no later than the first Wednesday of each month by 12:00 pm to qualify for review at the PDC meeting the following day.***

3. **GENERAL INFORMATION** -- please complete the following section:

Requestor Name: \_\_\_\_\_ Department: \_\_\_\_\_  
 Phone/Extension: \_\_\_\_\_ Email: \_\_\_\_\_

Department Contact: \_\_\_\_\_ Phone/Extension: \_\_\_\_\_  
 Manager: \_\_\_\_\_ Signature: \_\_\_\_\_  
 Vice President: \_\_\_\_\_ Signature: \_\_\_\_\_

Name of Event: \_\_\_\_\_  
 Date(s) of Event: \_\_\_\_\_ Location: \_\_\_\_\_

4. **FUNDING** – check all boxes that apply (Note: If you are utilizing monies from various accounts, please check with your manager to make sure account number is correct and funding is available.):

- ☐ Department Funds  
 Account #: \_\_\_\_\_ Provided estimate: \$ \_\_\_\_\_
- ☐ Managers \$2,000 allocation  
 Account #: \_\_\_\_\_ Provided estimate: \$ \_\_\_\_\_
- ☐ Faculty Association \$200 allocation  
 Account #: \_\_\_\_\_ Provided estimate: \$ \_\_\_\_\_
- ☐ CSEA collective bargaining annual allocation  
 Account #: \_\_\_\_\_ Provided estimate: \$ \_\_\_\_\_
- ☐ Grant funds  
 Account #: \_\_\_\_\_ Provided estimate: \$ \_\_\_\_\_
- ☐ Professional & Organizational Development (POD) Conference and Travel

Please note: Tuition Reimbursement also known as Professional Growth Funding is not administered through Professional & Organizational Development. If you are interested in receiving compensation after completing coursework or receiving certification that is job related as described in collective bargaining agreements, please contact the Human Resources Department at (909) 274-5481.

**5. STATEMENT OF JUSTIFICATION** -- please check all of the criteria options that support the event you are interested in attending and provide a written paragraph.

- ☐ Supports the mission of Mt. SAC -- *"The mission of Mt. San Antonio College is to support students in achieving their educational goals in an environment of academic excellence."*
- ☐ This opportunity supports the work of the unit
- ☐ This opportunity supports the individual within the unit

Write statement here.

**6. DESCRIPTIVE MATERIAL** -- please attach a brochure or copy of information containing the following (requests submitted without this material will be returned, possibly delaying or preventing eligibility):

- Conference Overview
- Date(s), Time(s), Location
- Descriptions of the activities you will be attending (highlight)
- Agenda (*If no current conference agenda is available, use agenda from last year's conference*)
- List which meals are included
- Confirmation of registration (including costs and lodging costs)
- Any other information pertaining to travel reimbursement

**7. ONCE YOUR TRAVEL IS COMPLETE (STEP II)**-- Complete the following two forms:

- Part B of the Mt. SAC Conference and Travel/Expense Claim Form
- Professional Organizational Development Evaluation & Reimbursement Form

Include original receipts for all reimbursement requests. Failure to do so will delay reimbursement. If you are driving your own vehicle, remember that 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. Supervisor signature required. Please have your division office forward it to the POD office upon completion. This is critical so that the T-number and final payment can be logged and tracked.

**EVALUATION & REIMBURSEMENT FORM**

**STEP II: ONCE YOUR TRAVEL IS COMPLETE**

1. **Complete part B of the Mt. SAC Conference and Travel/Expense Claim Form** shortly after your travel. Include original receipts for all reimbursement requests. Failure to do so will delay reimbursement. If you are driving your own vehicle, remember that 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. Supervisor signature required. Please have your division office forward it to the POD office upon completion. This is critical so that the T-number and final payment can be logged and tracked.

**2. Complete Conference & Travel Summary.**

Title of Conference/Activity: \_\_\_\_\_

Name of attendee(s): \_\_\_\_\_

Date(s) Attended: \_\_\_\_\_

Location: \_\_\_\_\_

1. What are/were your expectations of the event? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2. What were the results of the key sessions you attended? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3. How do you intend to incorporate the information or experience into your instruction or service? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

4. Would you recommend another person to attend this workshop/conference in the future? Why or why not? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

5. Additional Comments \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Conference and Travel Procedures Using POD Conference & Travel Budget Effective 2014-15 Fiscal Year

Please be aware that for the Academic Year 2014-15, the budget and approval process for conferences and travel using unrestricted general funds has been moved from the President's Office to Professional & Organizational Development (POD). Approximately \$1500 per approved person until all funds are exhausted for the 2014-15 fiscal year. Employees may apply multiple times until they have reached the \$1500 threshold. Please follow these procedures to submit conference and travel requests funded with POD Conference & Travel Budget. This process is composed of two (2) steps: Part I is completed before conference and travel occurs. Part II is completed after conference and travel has occurred. Parts I and II are required for approval and full reimbursement of expenses.

1. Please complete the "Conference and Travel Request/Expense Claim Form."
2. Include account number provided in the "Account Numbers for Conference and Travel."
3. Fill in the estimated cost amount.
4. Submit request to employee's manager and Vice President for approval. Please note that prior approval must be obtained at least three to four weeks before the date of the conference to allow time for reviewing and processing.
5. Complete STEP I of "Professional & Organizational Development Conference Funding Application and Guidelines" Form in its entirety.
6. Submit both forms to the POD office.
7. POD will notify the requestor when the paperwork is received and ready for review.
8. Professional Development Council (PDC) will review all documents and make a decision on the application.
9. POD will provide results (i.e. approval or denial). If the application is approved, all forms will be submitted to Fiscal Services department for processing. If the application is denied, PDC will provide a written statement as to why the application was rejected.
10. Upon completion of conference or event, applicants are required to submit Part B of the Conference and Travel Request /Expense Claim Form AND STEP II of the Professional & Organizational Development Evaluation & Reimbursement Form. Both forms must be submitted to the POD office.
11. POD will track all completed documents and provide updates/follow up to PDC.
12. Completed Part B Forms of the "Conference and Travel Request/Expense Claim Form" will be submitted to Fiscal Services for processing.