SNRE Business Office Procedures

Faculty and Staff Travel Policy

**Purpose:** To describe the different types of travel and how budgeted travel funds may be spent

**Target Audience:** SNRE Faculty and Staff

**General Guidelines**

There are many types of travel used to support the School of Natural Resources and Extension (SNRE) mission. There may be many interpretations on how different travel funds are spent. This policy is written so faculty and staff members have clear guidelines on how travel funds can be used and establishes clear accountability of who may approve such travel. This policy is effective July 1, 2015.

SNRE follows the UAF established travel regulations for requesting and reimbursing travel. It is the responsibility of the traveler to submit travel authorizations and travel expense reports within the established timeline. Travel authorizations must be approved before travel or travel related purchases may occur. Travel Authorizations will be approved ONLY if all mandatory employee training is completed.

Please contact the travel coordinator at the SNRE Business Office if you have any questions concerning these procedures.

**Types of Travel**

**External Grant Funded Travel:**

*Description:* External grant funded travel includes travel included in the scope of work and budget of an external grant. This travel is not only subject to the restrictions indicated in the award, but must also follow UAF policy and regulations.

**Extension District Admin Travel:**

*Description:* This is travel needed by admins in order to support the work of the district office. This includes travel related to administrative support, such as travel to the post office, to pick up supplies, to deliver supplies or program materials, etc.

*Restrictions:* The following restrictions apply to the Extension District Admin Travel allocation-
Faculty and Staff Travel Policy (Continued)

- Travel can only occur in the state of Alaska. Funds cannot be used for any travel outside Alaska.
- Funds can only be used for admins doing administrative work.
- Funds cannot be “saved up” and used across fiscal years. All unused funds lapse at the end of the fiscal year.
- Funds cannot be combined with other type of funds and/or used for purposes other than Extension District Admin Travel.
- Funds cannot be transferred to other budget categories such as services or supplies.
- The District Office Coordinator is responsible for proper use of Program Service Travel funds.

**Travel Approval:** The District Office Coordinator should authorize the use of funds.

**Budget Process:** This is a budgeted part of the district’s allocated funds and the aggregate dollar amount for travel that will be used throughout the coming fiscal year should be included in the annual budget request. Specific program travel and estimated costs should be listed in the budget request when required. However, changes in specific travel plans during the fiscal year due to administrative needs are permitted without additional budgetary approval as long as the budgeted dollar amount is not exceeded.

**Extension Program Service Travel:**

**Description:** This is travel related to implementation of extension programs. Previously, this was referred to as “district travel” or “specialist travel.” This includes travel related to program delivery, such as travel within the district for site visits, travel to local meetings, travel within the state to program area meetings, etc.

**Restrictions:** The following restrictions apply to the Extension Program Service Travel allocation-
- Travel can only occur in the state of Alaska. Funds cannot be used for any travel outside Alaska.
- Funds can be used to pay for other faculty or staff member’s travel to provide in-district programs.
- Funds cannot be “saved up” and used across fiscal years. All unused funds lapse at the end of the fiscal year.
- Funds cannot be combined with other type of funds and/or used for purposes other than Extension Program Service.
- Funds cannot be transferred to other budget categories such as services or supplies.
- The faculty member is responsible for proper use of Program Service Travel funds. These funds are in support of the faculty member’s approved workload and will be assessed when reviewing faculty performance.
Faculty and Staff Travel Policy (Continued)

**Travel Approval:** If a staff or other faculty member is traveling, then the faculty member that authorized the use of funds should approve the travel authorization through the electronic Banner Workflow process. If the faculty member is traveling, then the program chair must approve the travel authorization.

**Budget Process:** This is a budgeted part of the faculty member’s allocated funds and the aggregate dollar amount for travel that will be used throughout the coming fiscal year should be included in the annual budget request. Specific program travel and estimated costs should be listed in the budget request when required. However, changes in specific travel plans during the fiscal year due to client needs are permitted without additional budgetary approval as long as the budgeted dollar amount is not exceeded.

Professional Development Travel for Extension Activity:

**Description:** Each SNRE faculty member with an extension workload assignment is eligible for one trip per year for professional development. These funds must be used for travel and related expenses (i.e. registration fees) that directly contribute to a faculty member’s program responsibilities and involves interaction with entities in other land-grant institutions or NIFA and/or contains research and extension components.

**Restrictions:** The following restrictions apply to Professional Development Travel allocation:

- Professional development activity occurring on this trip must involve working with those from other states and/or contain a research and Extension component.
- Travel can occur within or outside the state of Alaska.
- The trip is approved, not specific amount of funds. Trips cannot be “saved up” and used across fiscal years. All approved trips that are unused lapse at the end of the fiscal year.
- All trips must be approved by the Vice Provost during the budget call process.
- Trips approved during the budget call process in April of the previous year may be exchanged for other trips per the Vice Provost's approval.

**Travel Approval:** The department/program chair should approve the Travel Authorization through the electronic Banner Workflow process. If travel is occurring outside the state of Alaska, the Vice Provost must also approve the travel authorization.

**Budget Process:** The specific Professional Development Travel and estimated cost for travel and related expenses should be included in the annual travel request.

Extension Activity Discretionary Travel:
Faculty and Staff Travel Policy (Continued)

**Description:** The Associate Director of CES is allocated additional funds to be used for general program support. These funds must be used for travel, contractual services, and commodities that directly contribute to fulfilling program responsibilities.

**Restrictions:** The following restrictions apply to the Extension Activity Discretionary Travel allocation:
- Travel can occur within or outside the state of Alaska.
- Funds can be used to pay for other faculty or staff member’s travel and related expenses (i.e. registration fees).
- Funds cannot be “saved up” and used across fiscal years. All unused funds lapse at the end of the fiscal year.
- Funds can be transferred to other budget categories such as services or supplies.

**Travel Approval:** If a staff or other faculty member is traveling, then the Associate Director must approve the travel authorization. If travel is occurring outside the state of Alaska, the Vice Provost must also approve the travel authorization. If the Associate Director is traveling, then the Vice Provost must approve the Travel Authorization.

**Budget Process:** This is a budgeted part of the Associate Director’s allocated funds and the aggregate dollar amount for travel that will be used throughout the coming fiscal year should be included in the annual budget request when required.

Representative Travel:

**Description:** The Vice Provost and Academic/Research Director(s) have an allocation of funds to pay for travel and related expenses for those faculty and/or staff that have been approved or appointed to serve on a regional or national committee or organization. These funds must be used for travel and related expenses (i.e. registration fees) that directly contribute to fulfilling the mission of School of Natural Resources and Extension.

**Restrictions:** The following restrictions apply to the Representative Travel allocation:
- Faculty or staff member must request authorization from the Vice Provost and/or Academic/Research Director(s) annually to serve or be appointed as a representative of SNRE. This request should be submitted with the annual travel budget request.
- Travel can occur within or outside the state of Alaska.
- Funds can be used to pay for travel and related expenses (i.e. registration fees).
- Funds cannot be “saved up” and used across fiscal years. All unused funds lapse at the end of the fiscal year.
- Funds can be transferred to other budget categories such as services or supplies.
Faculty and Staff Travel Policy (Continued)

- The Vice Provost and/or Academic/Research Director(s) have the discretion to use mileage tickets for representative travel.

**Travel Approval:** The Vice Provost and/or Academic/Research Director(s) must approve the travel authorization.

*Budget Process:* This is a budgeted part of the Vice Provost and Academic/Research Director(s) allocated funds. Each faculty or staff member that is approved or appointed to serve as a representative must submit their appointment or reappointment request along with a the specific representative activity and estimated cost for travel and related expenses in the annual travel budget request.

Research Travel:

*Description:* Faculty that have an approved Hatch Multi-State or McIntire Stennis capacity grant project may include travel for research or professional development purposes in their capacity grant budget request. Capacity grants follow the federal fiscal year and are subject to the federal guidelines and restrictions.

*Restrictions:* The following restrictions apply to the Research Travel allocation-

- Travel request must be submitted with the capacity grant project budget each year.
- Travel can occur within or outside the state of Alaska.
- Funds can be used to pay for travel and related expenses (i.e. registration fees).
- Funds cannot be “saved up” and used across federal fiscal years. All unused funds lapse at the end of the federal fiscal year.
- Funds can be transferred to other budget categories such as services or supplies.

**Travel Approval:** The Vice Provost and/or Academic/Research Director(s) must approve the travel authorization.

*Budget Process:* This is a budgeted part of the faculty member’s capacity grant project allocated funds.

Unbudgeted Travel

All travel should be included in the annual travel budget request for the following fiscal year. Any travel that is requested and was not included in the approved fiscal year budget, must be approved by the Vice Provost and Academic/Research Director(s) and will be dependent upon funding available. The Dean and/or Director have the discretion to use mileage tickets for unbudgeted travel.

Zero Dollar Travel
Faculty and Staff Travel Policy (Continued)

If travel is being paid by an external agency and reimbursement is not expected to occur through the University, the traveler must send an email to their supervisor and copy the SNRE Travel office. The email should contain the following information:

- Dates of travel
- Place of travel
- Indication of any personal time being taken (PTO form may be required)
- Purpose of travel
- Agency paying the travel expenses

Exceptions to Policy

The Vice Provost and/or Academic/Research Director(s) may make an exception to this policy on a case-by-case basis. All travel is dependent on funding available and may be revoked at any time.