

PPM 262: Travel to Attend Professional Society Meetings

Responsible Officer:	Chief Business Officer
Responsible Office:	Office of Program Planning and Evaluation
Issuance Date:	11/12/2020
Effective Date:	11/12/2020
Last Review Date:	01/01/1991
Scope:	Travel to Professional Society Meetings by UC ANR Academic Appointees

Contact:	Sibani Michael Bose
Title:	Chief Business Officer
Email:	sbose@ucanr.edu
Phone:	530-285-3821

TABLE OF CONTENTS

I.	POLICY SUMMARY.....	2
II.	DEFINITIONS.....	2
III.	POLICY TEXT	2
IV.	COMPLIANCE / RESPONSIBILITIES	3
V.	PROCEDURES	3
VI.	RELATED INFORMATION	4
VII.	FREQUENTLY ASKED QUESTIONS.....	4
VIII.	REVISION HISTORY	4

Note: For links to referenced documents see
Section VI, *Related Information*, below.

I. POLICY SUMMARY

- A.** This section of the University of California (UC) Agriculture and Natural Resources (ANR) Policy and Procedure Manual (PPM) describes the administration of the Cooperative Extension (UCCE) Professional Society Travel Fund, as managed by the Program Committee of the Academic Assembly Council.
- B.** The UCCE Professional Society Travel Fund supports travel by eligible UC ANR academic appointees to professional societies that are recognized organizations holding regularly scheduled meetings primarily for the reporting and exchange of knowledge among members. They publish peer-referred journals and/or edited proceedings of meetings to promote professional growth.

II. DEFINITIONS

Not used.

III. POLICY TEXT

A. Eligibility

- 1. All UC ANR academic appointees are potentially eligible to receive UCCE Professional Society Travel funds for one meeting per fiscal year, subject to fund availability and to the requirements of these policies and procedures. Approval is not transferable to another UC ANR academic appointee nor to or another meeting.
- 2. UC ANR academic appointees that are awarded travel funds and subsequently determine that they cannot attend the meeting must so notify the Program Planning and Evaluation Chief Business Office (see page 1 for contact information) via email immediately. Failure to do so will render the UC ANR academic appointee ineligible for UCCE Professional Society Travel funds for two (2) years.

B. The UCCE Professional Society Travel Fund

- 1. To encourage attendance of UC ANR academic appointees at meetings of professional societies, a fund has been established to support transportation costs, meeting registration, meals, and related expenses. The fund is administered by the Program Committee of the Academic Assembly Council.
- 2. Applications are reviewed and ranked by the Program Committee. The Committee may consult with County Directors, Statewide Program/Institute Directors, Associate Deans, and others in reviewing and ranking the applications. Ranking is based on the following pre-established criteria, listed in priority order.
 - a. UC ANR academic appointee applicants new to their positions.
 - b. UC ANR academic appointee applicants presenting a paper either by invitation or by submission.
 - c. UC ANR academic appointee applicants with assigned responsibilities in the meeting (such as section leader or committee chair).

- d. Benefit to the UC ANR academic appointee's program and/or to Cooperative Extension as a whole.
 - e. The number of people from one county or program area requesting funding for the same meeting may also be a factor of consideration to maintain an equitable distribution of funds among UC ANR academic appointees.
3. The amount of the award will not exceed a limit specified annually by the Academic Assembly Council. To the extent that the cost of the travel exceeds the maximum award of funding, the UC ANR academic appointee is responsible to supply additional funding to cover the full cost.
 4. A call for funding requests is issued biannually, approximately the first week in May (for travel July 1st through December 31st) and again approximately the first week in November (for travel January 1st through June 30th).
 5. Travel may be in- or out-of-State.

IV. COMPLIANCE / RESPONSIBILITIES

A. UCCE Academic Appointees

UC ANR academic appointees that are awarded funding are responsible to obtain their supervisor's approval for leave with pay to attend the professional society meeting. If the amount of funding awarded does not cover the full cost of travel, they are also responsible to supply supplemental funding. If a UC ANR academic appointee receives funding but later determines they will not attend the professional society meeting, they must immediately so notify the Chief Business Officer. Failure to notify the Chief Business Officer in a timely way will render the UC ANR academic appointee ineligible for UCCE Professional Society Travel funds for a period of two (2) years.

B. Academic Assembly Council, Program Committee

The Program Committee is responsible to review and rank applications for funding based on pre-established criteria.

V. PROCEDURES

- A. The Office of Program Planning and Evaluation will issue a biannual call for requests for award of funding on the Academic Assembly Council website (see below item VI, *Related Information* for a link). Prior to the stated deadline UC ANR academic appointees may submit their request by completing a survey offered by Program Planning and Evaluation on the website.
 1. UC ANR academic appointees are responsible to request and receive approval for leave with pay from their immediate supervisor.
- B. Program Planning and Evaluation will forward all requests to the Program Committee of the Academic Assembly Council, where they will be reviewed, ranked and decided upon by the Committee.
- C. The Chief Business Officer will then email all applicants as to the status of their request. For successful applicants, the Chief Business Officer will include in the

email the UCCE Professional Society Travel Fund account number to be used later when travel reimbursement is requested.

- D.** Within 30 days of the completion of travel, requests for travel reimbursement must be issued by the traveler. (Note: Requests for travel reimbursement submitted 60 or more days after completion of travel will be reported as taxable income to the traveler.)
1. UC ANR academic appointees that have access to the UC Davis AggieTravel system are responsible to process a travel reimbursement request for themselves. When requesting reimbursement, use the UCCE Professional Society Travel Fund account number identified earlier in the Chief Business Officer's email. All AggieTravel transactions for this purpose are electronically routed to the Chief Business Officer for approval.
 2. UC ANR academic appointees that do not have access to the UC Davis Aggie Travel system must complete a UC ANR TEV (travel voucher form) and submit it with receipts via email to the Chief Business Officer who will process it for the academic via the AggieTravel system. Upon completion of travel, contact the Chief Business Officer for a copy of the current form, as well as for answers to any questions regarding reimbursement.

VI. RELATED INFORMATION

- [UC ANR Academic Assembly Council Professional Society Meeting Travel Fund](#)

VII. FREQUENTLY ASKED QUESTIONS

Not used.

VIII. REVISION HISTORY

October, 2017: Format updated.

November, 2020: Revised for current practices, current personnel and titles, and clarity.