UNIVERSITY OF CALIFORNIA, ACADEMIC SENATE

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Jim Chalfant
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Chair of the Assembly of the Academic Senate
Faculty Representative to the Regents
University of California
1111 Franklin Street, 12th Floor
Oakland, California 94607-5200

February 24, 2017

SUSAN CARLSON, VICE PROVOST
ACADEMIC PERSONNEL

Re: Systemwide Review of Presidential Policy Business and Finance Bulletin (BFB) – G-28 Travel Regulations

Dear Susan:

As you requested, I distributed for systemwide Senate review proposed revisions to Presidential Policy Business and Finance Bulletin (BFB) – G-28 Travel Regulations. Six Academic Senate divisions (UCD, UCLA, UCM, UCR, UCSB, and UCSD) and one systemwide committee (UCAP) submitted comments. These comments were discussed at Academic Council's February 22, 2017 meeting. They are summarized below and attached for your reference.

The proposed revisions allow, in limited circumstances, reimbursement of pre-approved travel and childcare expenses for spouses, domestic partners, dependent-care providers, and dependents who accompany a UC employee traveling on University business, and candidates for employment traveling to UC locations for recruitment purposes.

In general, Senate reviewers support the proposed revisions and efforts to craft more inclusive and "family-friendly" systemwide travel policies. However, reviewers from UCD, UCLA, and UCSD also raised several concerns about language related to the oversight and review of family travel that need additional clarification in the policy. They recommend defining in more detail the requirements for receiving approval for reimbursement of family members' travel and child care expenses; the "senior University officials" who may approve such expenses; the "limited circumstances" in which reimbursement is appropriate; the ranks of UC employee impacted by the revisions; the types of funds that can be used to cover those expenses; and the circumstances in which reimbursements are taxable.

Please convey the need to address the foregoing as the campuses implement changes to the G-28 Travel Regulations. We appreciate consideration of our comments and concerns in finalizing the policy. Please do not hesitate to contact me if you have further questions.

Sincerely,

Jim Chalfant, Chair
Academic Council

Encl

Cc: Academic Council
Policy Manager Lockwood
Tax Manager Barrett
Senate Director Baxter
Senate Executive Directors

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February 13, 2017

Jim Chalfant
Chair, Academic Council

RE: Proposed Revisions to Presidential Policy Business and Finance Bulletin – G-28 Travel Regulations

Dear Jim:

The proposed revisions to G-28 Travel Regulations were distributed to all standing committees of the Davis Division. Two committees responded: Faculty Welfare and the Faculty Executive Committee of the College of Letters and Science.

Faculty Welfare recommends clarifying the policy's approval requirements. First, Faculty Welfare notes that "the regulation does not include a useful definition of the requirements for receiving approval for reimbursement of travel expenses of family"; and second, the "very broad chain of approval" outlined in the policy, particularly the category of "other senior University officer," is vague. In both cases, Faculty Welfare thinks the policy "leaves open the opportunity for proper requests to be denied and for improper requests to be approved."

In addition, Faculty Welfare thinks the regulations should explicitly state "the types of funds that can be used to cover 'family travel,' and whether this should restrict the use of certain funds for this purpose, such as student tuition and fees, donations, and/or unrestricted gift funds."

Finally, in the interest of making travel restrictions widely known to faculty (to prevent them from inadvertently purchasing non-reimbursable fares), the FEC of L&S wonders whether "there may be a place in this document for information on how faculty can access current UC restrictions on travel to certain states or countries."

The Davis Division appreciates the opportunity to comment.

Sincerely,

Rachael E. Goodhue
Chair, Davis Division of the Academic Senate
Professor and Chair, Agricultural and Resource Economics

Enclosed: Davis Division Committee Responses

c: Edwin M. Arevalo, Executive Director, Davis Division of the Academic Senate
Hilary Baxter, Executive Director, Systemwide Academic Senate
Michael LaBriola, Principal Policy Analyst, Systemwide Academic Senate

UC DAVIS: ACADEMIC SENATE
COMMITTEE ON FACULTY WELFARE

February 13, 2017

RFC: Review of Presidential Policy Business and Finance Bulletin - G-28 Travel Regulations

The committee on Faculty Welfare reviewed the revised G-28 Travel Regulations and feel that although the change is useful in many situations, there are some concerns that should be addressed. Please see the bullet points below for the concerns of the committee.

- The regulation does not include a useful definition of the requirements for receiving approval for reimbursement of travel expenses of family. Without this definition, the policy leaves open the opportunity for proper requests to be denied and for improper requests to be approved.
- The document should be explicit regarding the types of funds that can be used to cover "family travel", and whether this should restrict the use of certain funds for this purpose, such as student tuition and fees, donations, and/or unrestricted gift funds.
- The revision states that travel reimbursements can be approved by "the Chancellor, Executive Vice Chancellor/provost, Dean, Director, Department Chair, or other senior University Officer, as designated." The committee suggests that this very broad chain of approval is likely to invite improper approval, particularly lack of specificity invited by "other senior University Officer".

FEC: College of Letters and Science

February 7, 2017 1:36 PM

The L & S FEC discussed the Presidential Policy Business and Finance Bulletin - G-28 Travel Regulations on February 6, 2017. Members questioned whether there may be a place in this document for information on how faculty can access current UC restrictions on travel to certain states or countries (i.e., this is a type of travel regulation). If faculty purchase tickets without knowing the travel restrictions, fares may be non-refundable and non-reimbursable.

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February 14, 2017

Jim Chalfant, Academic Council
1111 Franklin Street, 12th Floor
Oakland, CA 94607-5200

RE: Systemwide Senate Review of Presidential Policy Business and Finance Bulletin (BFB) – G-28 Travel Regulations

Dear Jim,

The Irvine Division's Council on Faculty Welfare, Diversity, and Academic Freedom and Senate Cabinet reviewed the proposed revisions to Presidential Policy Business and Finance Bulletin (BFB) – G-28, Travel Regulations.

The Irvine Division applauds these changes and unanimously endorses the proposed revisions.

The Irvine Division appreciates the opportunity to comment.

Sincerely,

William Parker

Bill Parker
Irvine Division Senate Chair

C: Maria Pantelia, Chair-Elect, Academic Senate, Irvine Division
Hilary Baxter, Executive Director, Academic Senate
Natalie Schonfeld, Executive Director, Academic Senate, Irvine Division

February 15, 2017

Jim Chalfant
Chair, Academic Council

RE: Systemwide Review of Presidential Policy Business and Finance Bulletin G-28

Dear Jim,

The Executive Board of the UCLA Academic Senate solicited comments on the Proposed Revisions to Presidential Policy Business and Finance Bulletin (BFB) – G-28 Travel Regulations from the standing committees of the Senate, as well as the Faculty Executive Committees, to maximize faculty feedback; the individual responses from our various committees are available online. The Executive Board was unable to meet and discuss the attached responses so they are submitted as received. However, I do want to point out that although several committees reported agreement on the importance of making the policy more inclusive and "family friendly," there are several comments in the individual responses worthy of note, including:

- Committee on Committees: "seek clarification and urge specificity from proposers with respect to whom will likely benefit from the revisions to the Presidential policy governing travel regulations."
- Graduate Council: "encourage proposers to consider explicitly including and naming graduate students and postdoctoral scholars in the revised policy: their family responsibilities too often go unseen."
- Council on Research reports that the wording is unclear, e.g., section V.H.2.f says "limited circumstances", but is vague on what those are. Also, section VI says the Chancellor can delegate the approval, but does not say to whom he or she may delegate.
- CPB Members noted that the proposed policy lacks clarity and recommended the explicit definition of the ranks impacted by the revisions. What is the primary audience of these revisions? The term "business traveler" (section V.h.2.f.) should be more clearly defined to lessen the misperception and potential abuse.

The Academic Senate leadership appreciates the opportunity to opine and has no additional suggestions.

Please feel free to contact me should have any questions.

Sincerely,

Chair, UCLA Academic Senate

cc: Hilary Baxter, Executive Director, Systemwide Academic Senate
Leo Estrada, Immediate Past Chair, UCLA Academic Senate
Sandra Graham, Vice Chair/Chair-Elect, UCLA Academic Senate
Michael LaBriola, Principal Policy Analyst, Systemwide Academic Senate
Linda Mohr, Chief Administrative Officer, UCLA Academic Senate
Shane White, Vice Chair, Academic Council

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FEBRUARY 15, 2017

JIM CHALFANT, CHAIR, ACADEMIC COUNCIL

RE: PRESIDENTIAL POLICY BUSINESS AND FINANCE BULLETIN (BFB) – G-28, TRAVEL REGULATIONS

The proposed revisions to the *Presidential Policy Business and Finance Bulletin (BFB) – G-28, Travel Regulations* were distributed for comment to the standing committees of the Merced Division of the Academic Senate and the school executive committees. The Committee on Academic Planning and Resource Allocation, the Committee on Research, the Committee for Diversity and Equity, and the Committee on Faculty Welfare and Academic Freedom endorsed or otherwise support the proposed revisions. All other committees appreciated the opportunity to opine, but had no comment.

In keeping with committee feedback, Divisional Council endorsed the proposed revisions at its meeting on February 2, 2017.

We thank you for the opportunity to opine.

Sincerely,

Susan Amussen, Chair
Division Council

CC: Divisional Council
Hilary Baxter, Executive Director, Systemwide Academic Senate
Laura Martin, Executive Director, Merced Senate Office

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February 15, 2017

Jim Chalfant, Chair, Academic Council
1111 Franklin Street, 12th Floor
Oakland, CA 94607-5200

RE: Proposed Revisions to Presidential Policy Business and Finance Bulletin (BFB) G-28 – Travel Regulations

Dear Jim,

I write in response to the Proposed Revisions to BFB G-28. The reviewing committees' responses are as follows.

The Committee on Academic Personnel did not comment, stating that the policy its outside its charge. The Committee on Diversity and Equal Opportunity finds the revision to be reasonable and did not add further comment. Enthusiastic support is given by the Committee on Research, specifically praising the revisions for being "family-friendly." Finally, the Committee on Faculty Welfare supports the revision and provides no further comment.

Sincerely yours,

Dylan Rodríguez
Professor of Ethnic Studies and Chair of the Riverside Division

CC: Hilary Baxter, Executive Director of the Academic Senate
Cherysa Cortez, Executive Director of UCR Academic Senate Office

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(805) 893-4511
http://www.senate.ucsb.edu
Henning Bohn, Chair

February 14, 2017

To: Jim Chalfant, Chair
Academic Council

From: Henning Bohn, Chair
Santa Barbara Division

Re: Proposed Revised Presidential Policy Business and Finance Bulletin (BFB) – G-28, Travel Regulations

The Santa Barbara Division distributed the *Proposed Revised Presidential Policy Business and Finance Bulletin (BFB) – G-28, Travel Regulations* to a broad spectrum of Councils and Committees for review and optional comment. General support for the proposed revisions was affirmed by the Council on Faculty Issues and Awards, Council on Research and Instructional Resources, Council on Planning and Budget, and the Faculty Executive Committees of the Gevirtz Graduate School of Education and the College of Engineering.

The Council on Faculty Issues and Awards appreciates the proposed new allowances in support of family travel, but raised concern about the statement on page 12 that "spouse, domestic partner, dependent-care provider, and dependent travel expenses may not be charged to state funds." It was noted that Senate funding is comprised of State funds and under this rule, Senate service to systemwide committees would not be included in the policy.

The Council on Research and Instructional Resources found the proposed revisions to be reasonable and reaffirming, particularly for recruitment purposes, but encouraged effective safeguards for preventing abuse.

The College of Engineering Faculty Executive Committee suggests clarifying the language regarding when reimbursements are taxable. The Committee noted as an example the following statement, which seems to leave open the possibility that expenses that do not have a business purpose are reimbursable (but taxable): "Reimbursable expenses listed above that do not have a clear University business purpose...are not allowable as a tax-free reimbursement."

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125 CLARK KERR HALL
(831) 459 - 2086

February 15, 2017

James Chalfant, Chair
Academic Council

Re: Systemwide Review of Proposed Revised G-28 Travel Regulations

Dear Jim,

The UC Santa Cruz Division reviewed and discussed the proposed revisions to the Presidential Policy Business and Finance Bulletin (BFB) – G-28, Travel Regulations. Our Committees on Rules, Jurisdiction and Elections (RJ&E), Faculty Welfare (CFW), and Affirmative Action and Diversity (CAAD) responded. Our committees recognize this as a meaningful step toward addressing the need for greater inclusion for our diverse faculty in university policy, and the Division fully supports the changes.

We appreciate the opportunity to comment, and look forward to the approval of the proposed revised travel regulations.

Sincerely,

Ólőf Einarsdóttir, Chair
Academic Senate
Santa Cruz Division

UNIVERSITY OF CALIFORNIA, SAN DIEGO UCSD

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February 16, 2017

Professor Jim Chalfant
Chair, Academic Senate
University of California
1111 Franklin Street, 12th Floor
Oakland, California 94607-5200

SUBJECT: Proposed Revisions to Policy G-28, Travel Regulations

Dear Jim:

The proposed revisions to Policy G-28, Travel Regulations were circulated to standing Senate committees for review, and were discussed at the San Diego Divisional Senate Council's meeting on February 13, 2017. The San Diego Divisional Senate Council endorsed the proposed changes. Additional comments and suggestions are summarized below.

Reviewers suggested a revision of the term "dependents" to specifically include persons with disabilities. Reviewers expressed concern at the lack of clarity regarding the oversight and review of spousal travel, and suggested further clarification of the policy in this area.

Sincerely,

Kaustuv Roy, Chair
Academic Senate, San Diego Division

cc: F. Ackerman
H. Baxter
R. Rodriguez

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UNIVERSITY COMMITTEE ON ACADEMIC PERSONNEL (UCAP)
Fanis Tsoulouhas, Chair
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February 4, 2017

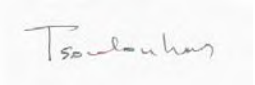
JIM CHALFANT, CHAIR
ACADEMIC COUNCIL

RE: PROPOSED REVISIONS TO PRESIDENTIAL POLICY BUSINESS & FINANCE BULLETIN – G-28, TRAVEL REGULATIONS

Dear Jim,

UCAP reviewed the proposed revisions to Presidential Policy Business & Finance Bulletin – G-28, Travel Regulations during our meeting on January 11, 2017. UCAP has no objections to the proposed revisions and members agree that this policy may help with recruitment.

Sincerely,



Fanis Tsoulouhas, Chair
UCAP