



Kum-Kum Bhavnani
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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*

May 29, 2020

**SUSAN CARLSON, VICE PROVOST
ACADEMIC PERSONNEL**

Re: Proposed Revised Presidential Policy on Travel Regulations

Dear Susan,

As you requested, I distributed for systemwide Senate review the proposed revised Presidential policy on Travel Regulations. Nine Academic Senate divisions and one systemwide committee (UCORP) submitted comments. These comments were discussed at Academic Council's May 27, 2020 meeting and are attached for your reference.

We understand that the proposed revisions incorporate recommendations from an internal UC audit regarding business and first-class travel and the documentation of travel business-purpose. They also incorporate gender-neutral references, suggestions for sustainable travel, and revisions to the IRS business mileage rate effective January 1, 2020.

In general, reviewers expressed support for the policy's efforts toward gender-neutrality and sustainability best practices. They also noted some concerns and made suggestions for clarifying requirements around cost effectiveness and sustainability.

Reviewers are concerned that the new requirement to document and justify activities for each travel day will create unneeded additional administrative and clerical burdens on faculty, and infringe on faculty research processes. These burdens will be particularly acute for faculty who travel for prolonged field work and those who travel frequently. They also seem to conflict with the goal to make travel more efficient and sustainable. We suggest that the policy increase flexibility regarding the need for daily documentation.

The policy would also benefit from clearer guidance about unanticipated situations requiring itinerary changes and cancellations before or during travel. A flexible exception policy is particularly important given COVID-19, and the policy should explicitly allow for the reimbursement of both cancellation fees and remaining nonrefundable expenses when a traveler has had to cancel due to circumstances beyond their control.

A number of reviewers noted the need for the policy to strike a balance between promoting sustainably by discouraging unnecessary travel and a recognition that for in a number of

instances, travel for presentation of work is essential for research development (discussing research ideas with colleagues at other institutions) and advancement. Reviewers noted that phrasing in the policy articulating a preference for sustainable travel may make it more difficult to justify traveling rather than participating remotely at conferences and workshops, or make such practices *de facto* mandatory. In person participation at academic conferences is a key way that all faculty, particularly junior faculty forge professional and research connections.

Finally, reviewers recommend that the policy specify that internet services, baggage, and cell phone expenses are reimbursable; clarify university procedures and policies related to travel cancellation insurance; and avoid mentioning specific travel provider companies. We also encourage you to consider additional specific comments and clarifications requests from UCSC and other reviewers.

Thank you for the opportunity to opine. Please do not hesitate to contact me if you have additional questions.

Sincerely,

A handwritten signature in black ink that reads "Kum-Kum Bhavnani". The signature is written in a cursive, flowing style.

Kum-Kum Bhavnani, Chair
Academic Council

cc: Tax Manager Barrett
Academic Council
Senate Directors



320 STEPHENS HALL
UNIVERSITY OF CALIFORNIA

May 19, 2020

KUM-KUM BHAVNANI
Chair, Academic Council

Subject: Comments on the Proposed Revised Presidential Policy "Travel Regulations"

Dear Kum-Kum,

On May 11, 2020, the Divisional Council (DIVCO) of the Berkeley Division discussed the *Proposed Revised Presidential Policy "Travel Regulations"* (Policy G-28) informed by reports of the committees on Faculty Welfare (FWEL) and Research (COR). DIVCO endorsed the reports, which are appended in their entirety.

DIVCO is supportive of the policy revisions. There was discussion on the use of UC systemwide travel program, *Connexus*. Comments included the ease, as well the difficulty of the use of *Connexus*. The challenges in ease of use may be attributable to the fact that some faculty members rarely use this system. In addition, DIVCO questioned the savings of this travel system. DIVCO members agreed that *Connexus* should not be mandated and efforts should be undertaken to make *Connexus* more user-friendly.

Thank you for the opportunity to comment. If you have any questions, please don't hesitate to contact me.

Sincerely,

A handwritten signature in black ink, appearing to read 'Oliver O'Reilly'.

Oliver O'Reilly
Chair, Berkeley Division of the Academic Senate
Professor of Mechanical Engineering

Enclosures

cc: Jennifer Johnson-Hanks, Vice Chair, Berkeley Division of the Academic Senate
David Hollinger, Chair, Committee on Faculty Welfare
John Colford, Committee on Research
Jocelyn Surla Banaria, Executive Director, Berkeley Division of the Academic Senate
Sumali Tuchrello, Senate Analyst, Committee on Faculty Welfare
Deborah Dobin, Senate Analyst, Committee on Research



320 STEPHENS HALL
UNIVERSITY OF CALIFORNIA

April 27, 2020

CHAIR OLIVER O'REILLY
Academic Senate

Re: Systemwide Travel Policy

Dear Oliver,

On April 27th the membership of the Committee on Faculty Welfare (FWEL) engaged in a discussion of the revised Systemwide Travel Regulations (Policy G-28). The committee has no concern with the substance of the recommended changes.

At least one member did raise objection to the established language under item C.1: Travel Management Services where it indicates that, "After appropriate training and communication, campuses should mandate the use of Connexus in order to realize the potential savings..." The experience of bumpy and disjointed roll-outs of other systemwide programs is enough that campuses should be left to utilize their established programs that may already be in place.

Respectfully submitted,

A handwritten signature in dark ink, appearing to read 'David Hollinger'.

David Hollinger, Co-Chair

David Steigmann, Co-Chair

DH/DS/st



April 9, 2020

PROFESSOR OLIVER O'REILLY
Chair, Berkeley Division of the Academic Senate

*Re: COR Comments on Proposed Presidential Policy on
Travel Regulations*

At its meeting on March 18, COR briefly discussed the Proposed Presidential Policy on Travel Regulations. Members were generally supportive of the revisions, although some expressed concern about campuses mandating the use of Connexus for travel. They noted the increasing administrative workload for faculty, as staff support declines, and they are specifically concerned about Connexus, which they have found difficult to use.

It was suggested that the policy be amended to suggest that campuses recommend the use of Connexus for those who choose to use it, without mandating its use for all travel.

Thank you for asking COR to comment on this proposed policy revision.

With best regards,

A handwritten signature in black ink that reads 'John M. Colford, Jr.'.

John Colford, Chair
Committee on Research



DAVIS DIVISION OF THE ACADEMIC SENATE
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academicsenate.ucdavis.edu

May 20, 2020

Kum-Kum Bhavnani
Chair, Academic Council

RE: Proposed Revised Presidential Policy on Travel Regulations

Dear Kum-Kum:

The proposed revised Presidential Policy on Travel Regulations was forwarded to all standing committees of the Davis Division of the Academic Senate. Five committees responded: Faculty Welfare, Planning and Budget (CPB), and the Faculty Executive Committees of the College of Agricultural and Environmental Sciences (CAES), the School of Law (LAW), and the School of Medicine (SOM).

Committees support the policy's efforts toward gender-neutrality and sustainability. Enclosed, CPB, CAES, and LAW offer feedback on specific sections, such as nuancing the various requirements for cost effectiveness, clarifying emissions calculations in travel, and including exceptions that address unanticipated situations before or during travel, particularly in light of COVID-19 realities.

The Davis Division appreciates the opportunity to comment.

Sincerely,

A handwritten signature in black ink that reads "Kristin H. Lagattuta".

Kristin H. Lagattuta, Ph.D.
Chair, Davis Division of the Academic Senate
Professor, Department of Psychology and Center for Mind and Brain

Enclosed: Davis Division Committee Responses

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

May 15, 2020

Kristin Lagattuta, Chair
Davis Division of the Academic Senate

RE: Proposed Revised Presidential Policy on Travel Regulations

Dear Professor Lagattuta,

The Faculty Welfare Committee reviewed and discussed the Proposed Revised Presidential Policy on Travel Regulations. Committee members have no concerns with the revised policy.

Regards,

Moradewun Adejunmobi, Chair
Faculty Welfare Committee

May 18, 2020

Kristin Lagattuta

Chair, Davis Division of the Academic Senate

RE: Proposed Presidential Policy on Travel Regulations

The Committee on Planning and Budget (CPB) reviewed the Proposed Presidential Policy on Travel Regulations and offers the following points:

- If trips are cancelled for health, weather, or other unavoidable reasons, will employees be reimbursed for out of pocket expenses that they cannot use for future travel?
- The new section on sustainability (page 22) is commendable but vague. To truly "consider emissions," is there a specific exchange rate between emissions and price? For example, can employees spend 10 percent more to rent a hybrid vehicle instead of an inefficient gas vehicle? It is not entirely clear how these factors should be weighed.
- When using one's own vehicle (page 23), it should also factor and balance the time (and therefore productivity) it would take an employee to procure a rental vehicle instead of using their own.

The College of Agricultural and Environmental Sciences Faculty Executive Committee appreciates the opportunity to comment on this travel policy document. We appreciate the efforts to gender-neutralize and modernize various aspects of the policy. We also agree with efforts to update sustainability measures.

In reviewing the document there are additional points we suggest warrant consideration:

An itinerary involves over night travel without an opportunity for normal rest before the commencement of working hours. Campus procedures must include required documentation to support the early meeting start time and/or that alternative start dates or times are unavailable; or

This statement implies the primary focus is on the meeting agenda, which is obviously one variable. Additionally, however, faculty and others may have important and necessary commitments the day(s) before that warrant being forced to take red-eye travel, even if the meeting is not deemed by others to be starting “early”. We recommend understanding and flexibility in these determinations.

Private Vehicles

- *The following rules apply to all domestic travel.*
- *Mileage Reimbursement Rates*
- *When two or more persons on University business share a private vehicle, **only the driver may claim reimbursement for mileage.***

One might assume that reference to “Driver” implies the driver is the owner? One could imagine that the owner becomes the passenger. Unclear why the need to specify that only the driver should initiate the reimbursement request (assuming driver is anticipated to be owner), including if both parties might serve as the “driver”?

1. *Travel only when necessary. Avoid unnecessary travel by leveraging remote technology such as video and/or phone conferencing.*

A definition of “necessary” is wanting given this could be subject to interpretation. Suggest “Minimize travel when possible” or similar.

- *Vehicles available with through UC the Hertz and National/Enterprise agreements;*

We discourage identification of specific carriers. In the current climate these companies may not be in business in the future. Also could be misconstrued as suggestion of preference by UC. Examples are not given for air carriers, so the same approach should be applied here.

- When considering driving a personally owned vehicle in lieu of renting while on business travel, factor in the cost to the University. First by comparing of using own vehicle at the mileage reimbursement rate associated with a personally owned vehicle to versus rental car daily rates. to identify not only the most cost effective but alsoSecond, by comparing the potential savings related to the reduction in carbon emissions impacts and fuel efficiency by considering renting a (hybrid electric rentalvehicle. versus older, less efficient personal vehicle);

- Consider accommodation providers which are actively limiting their emissions and encouraging other sustainable practices such as water and waste reductions, as well as inclusive and responsible labor policies.

These suggestions about calculation of emissions impact are honorable. However, as presented they are unnecessarily detailed and suggest calculations be performed for which data might not be available. Suggest generalize further to highlight the principle more so than the action.

Allowable miscellaneous expenses include the following:

- Business office expenses such as word processing services; equipment rentals; fax and computer expenses; copy services; overnight delivery/postage; purchase of materials and supplies, when normal purchasing procedures cannot be followed; rental of a room or other facility for the transaction of official business; local and long-distance telephone calls (including one reasonably brief, non-emergency, personal

We suggest one of the most frequent costs would be internet connections at hotels and at other locations. Fax is almost outdated. In an effort to modernize and improve relevance, please specify that internet services etc are reimbursable.

General comment:

The current COVID19 situation has obviously had major impacts on the way travel is conducted by University members. We recommend that amendments/exceptions be introduced to this document that reflect or anticipate situations that might arise for travelers (beyond those already covered by insurance etc). For example, the following statement may create a challenging situation if a traveler was forced into lock-down. There are perhaps other situations in the document that should be considered/revisited in light of the COVID19 pandemic.

Regardless of the length of time for business travel, the traveler **must** be at least forty miles from the headquarter location or home, whichever is closer, to be reimbursed for an overnight stay.

Proposed Revised Presidential Policy on Travel Regulations

FEC: School of Law Committee Response

May 13, 2020

The School of Law has no objections to the proposed revisions. We assume that the business purpose of each day of travel will sometimes just be to save the university money. For example, if one has back-to-back conferences in Chicago, it may be cheaper to stay one extra night in a Chicago hotel, rather than fly back to Davis and then return the next day. We trust that the business purpose rule will not be so rigidly applied as to preclude those types of savings.

Proposed Revised Presidential Policy on Travel Regulations

FEC: School of Medicine Committee Response

May 13, 2020

The School of Medicine, Faculty Executive Committee would like to give kudos to the staff who put in the effort to make changes to the RFC titled 'Proposed Revised Presidential Policy on Travel Regulations' to make it gender neutral and more sustainable. This was commendable on their part and is much welcomed and appreciated.

May 20, 2020

Kum-Kum Bhavnani, Academic Council Chair
1111 Franklin Street, 12th Floor
Oakland, CA 94607-5200

Re: Systemwide Review of Proposed Revised Presidential Policy on Travel Regulations

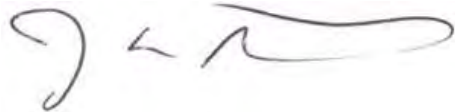
Dear Chair Bhavnani,

At its May 19, 2020 meeting, the Irvine Division Senate Cabinet reviewed the proposed revised Presidential Policy on Travel Regulations. Irvine's Council on Planning and Budget (CPB) reviewed the proposal prior to the meeting.

Overall, CPB found the proposed revisions sensible. The Council pointed out one small technical glitch in the document, noted in the attached memo. The Cabinet unanimously supports the proposed policy revisions.

The Irvine Division appreciates the opportunity to comment.

Sincerely,



James Steintrager, Chair
Academic Senate, Irvine Division

Enclosures: CPB memo

C: Hilary Baxter, Executive Director, Academic Senate
Jeff Barrett, Chair Elect-Secretary, Academic Senate, Irvine Division
Kate Brigman, Executive Director, Academic Senate, Irvine Division
Gina Anzivino, Assistant Director, Academic Senate, Irvine Division



May 18, 2020

JAMES STEINTRAGER, CHAIR
ACADEMIC SENATE, IRVINE DIVISION

RE: Systemwide Review of Proposed Revised Presidential Policy on Travel Regulations

At its May 13, 2020 meeting, the Council on Planning and Budget (CPB) discussed the proposed revised Presidential Policy on Travel Regulations.

The proposed revisions include the following:

1. Incorporation of the Internal Audit recommendations regarding documentation necessary to support first or business class travel, and the need to document the business purpose of each day of the trip;
2. Update the policy for the new IRS business mileage reimbursement rate effective January 1, 2020;
3. Substitution of gender-neutral language throughout the policy
4. Addition of a new section on sustainable travel and
5. Clarification of what is included in the foreign per diem and link to the Department of State website in Appendix B

Overall, the Council found the proposed revisions sensible. A minor issue CPB observed in Section V.D.3.b.ii. Insurance Coverage is the link for “UC Car Rental Insurance Information” appears to be broken.

CPB appreciates the opportunity to comment.

On behalf of the Council,



Don Senear, Chair

CC: Kate Brigman, Executive Director, Academic Senate
Gina Anzivino, Assistant Director, Academic Senate
Michelle Chen, CPB Analyst



May 20, 2020

Kum-Kum Bhavnani
Chair, Academic Council

Re: Proposed Revision to Presidential Policy, Travel Regulations

Dear Chair Bhavnani,

The Divisional Executive Board met on May 14, 2020, and discussed the Proposed Revision to Presidential Policy on Travel regulations and the responses of divisional committees. Overall, the Executive Board supports the proposed revision to presidential policy. We do want to note that the new phrasing on sustainable travel may make it more difficult to justify traveling to, rather than participate remotely at, academic workshops, etc. An integral part of participating in-person at professional events is the opportunity to speak informally to colleagues and forge research connections.

We appreciate the opportunity to opine on this proposed presidential policy. As is the divisional practice, we have appended all of the committee responses we received prior to the deadline to submit our response.

Sincerely,



Michael Meranze
Chair, UCLA Academic Senate

Encl. Committee responses

Cc: Hilary Baxter, Executive Director, Systemwide Academic Senate
Joseph Bristow, Immediate Past Chair, UCLA Academic Senate
April de Stefano, Executive Director, UCLA Academic Senate
Mary Gauvain, Vice Chair, Systemwide Academic Senate
Michael LaBriola, Assistant Director, Systemwide Academic Senate
Shane White, Vice Chair/Chair Elect, UCLA Academic Senate

3125 Murphy Hall
410 Charles E. Young Drive East
Los Angeles, California 90095

April 28, 2020

To: Michael Meranze, Chair, Academic Senate

From: Adriana Galván, Chair, Undergraduate Council

Re: Systemwide Senate Review of Proposed Revised Presidential Policy on Travel Regulations

The Undergraduate Council reviewed and discussed the Proposed Revised Presidential Policy on Travel Regulations at its meeting on April 24, 2020. Council members expressed general support for the proposed policy and have no additional comments.

Thank you for the opportunity to review and comment. If you have any questions, please contact me via the Undergraduate Council's analyst, Aileen Liu, at aliu@senate.ucla.edu.

cc: Shane White, Vice Chair/Chair Elect, Academic Senate
Joseph Bristow, Immediate Past Chair, Academic Senate
April de Stefano, Executive Director, Academic Senate
Lené Levy-Storms, Vice Chair, Undergraduate Council
Aileen Liu, Committee Analyst, Undergraduate Council

April 20, 2020

Michael Meranze
Chair, UCLA Academic Senate

Re: Systemwide Senate Review: Travel Policy on Travel Regulations

Dear Professor Meranze,

At its April 1, 2020 meeting, the Council on Research (COR) reviewed the Proposed Revised Travel Policy on Travel Regulations.

The majority of members agreed not to opine. However, a few members expressed that the new phrasing on sustainable travel may make it more difficult to justify traveling rather than participate remotely at workshops, etc. Participating in person at meetings is an integral part of speaking informally to colleagues and forging research connections.

If you have any questions for us, please do not hesitate to contact me at desjardins@ucla.edu or via the Council's analyst, Elizabeth Feller, at efeller@senate.ucla.edu or x62470.

Sincerely,



Richard Desjardins, Chair
Council on Research

cc: Joseph Bristow, Immediate Past Chair, Academic Senate
April de Stefano, Executive Director, Academic Senate
Elizabeth Feller, Principal Analyst, Council on Research
Shane White, Vice Chair/Chair-Elect, Academic Senate
Members of the Council on Research

March 16, 2020

Michael Meranze, Chair
Academic Senate

Re: Systemwide Senate Review of the Proposed Revised Travel Policy on Travel Regulations.

Dear Professor Meranze,

At its March 9, 2020 meeting, the Council on Planning and Budget (CPB) reviewed the Proposed Revised Travel Policy on Travel Regulations.

Although members had no comments on the changes themselves, they would like to underscore the fact that there are cost savings measures that are not being pursued. The current policy on travel and travel reimbursement does not allow for the traveler to purchase travel bundles (transportation, accommodation, etc.), as such it does not always provide the most cost-efficient arrangements. We understand that such bundles may not allow for transparency with regard to spending in various categories, but our understanding is that the cost savings can be sufficiently great to make such action warranted nonetheless. This is a general reimbursement problem that we hope the university might address, in particular in regards to saving scarce funds available for travel.

Thank you for the opportunity to review and comment on the proposed revisions to the policy. If you have any questions for us, please do not hesitate to contact me at mcgarry@ucla.edu or via the Council's analyst, Elizabeth Feller, at efeller@senate.ucla.edu or x62470.

Sincerely,



Kathleen McGarry, Chair
Council on Planning and Budget

cc: Joseph Bristow, Immediate Past Chair, Academic Senate
April de Stefano, Executive Director, Academic Senate
Elizabeth Feller, Analyst, Council on Planning and Budget

Shane White, Vice Chair/Chair-Elect, Academic Senate
Members of the Council on Planning and Budget



OFFICE OF THE ACADEMIC SENATE
TOM HANSFORD, CHAIR
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(209) 228-7930

April 28, 2020

Kum-Kum Bhavnani, Chair, Academic Council

Re: Systemwide Review of Proposed Presidential Policy "Travel Regulations"

Dear Chair Bhavnani:

The proposed revisions to the [Presidential Policy on Travel Regulations](#) was distributed for review and comment to the UCM Senate Committees on Research (CoR), Faculty Welfare and Academic Freedom (FWAF), the Graduate Council (GC), and the School Executive Committees¹.

FWAF endorsed the policy. The committee's memo is appended.

The Merced Division thanks you for the opportunity to opine.

Sincerely,

A handwritten signature in black ink, appearing to be "Tom Hansford".

Tom Hansford
Chair, Divisional Council

CC: Divisional Council
Hilary Baxter, Executive Director, Systemwide Academic Senate
Fatima Paul, Interim Executive Director, Merced Senate Office

¹ CoR, GC, and the School Executive Committees declined to comment.

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ACADEMIC SENATE, MERCED DIVISION
COMMITTEE ON FACULTY WELFARE AND ACADEMIC FREEDOM
CAROLIN FRANK, CHAIR
cfrank3@ucmerced.edu

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(209) 228-4369

April 7, 2020

To: Tom Hansford, Chair, Divisional Council

From: Carolin Frank, Chair, Committee on Faculty Welfare and Academic Freedom (FWAF)

Re: Revised Presidential Policy on Travel Regulations

The Committee on Faculty Welfare and Academic Freedom (FWAF) has reviewed the proposed Revised Presidential Policy on Travel Regulations.

FWAF is pleased to endorse the proposed policy.

cc: Senate office

Enclosed (1)



CHAIR, ACADEMIC SENATE
RIVERSIDE DIVISION
UNIVERSITY OFFICE BUILDING, RM 225

DYLAN RODRIGUEZ
PROFESSOR OF MEDIA & CULTURAL STUDIES
RIVERSIDE, CA 92521-0217
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EMAIL: DYLAN.RODRIGUEZ@UCR.EDU

May 18, 2020

Kum-Kum Bhavnani, Chair, Academic Council
1111 Franklin Street, 12th Floor
Oakland, CA 94607-5200

RE: Presidential Policy Business and Finance Bulletin G-28: Travel Regulations

Dear Kum-Kum,

The Riverside Division of the Academic Senate is pleased to offer its review of Presidential Policy Business and Finance Bulletin G-28: Travel Regulations.

In addition to the attached consultative responses from standing committees, the UCR Executive Council examined the policy and is offering a few points of emphasis. Several Council members find the policy will create additional unneeded clerical burdens on faculty and staff, while creating an untenable process in which faculty on research and field visits will be subjected to rather insulating forms of bureaucratic micromanagement. In fact, these tedious and even infantilizing micro-managerial processes are seen by Council as potential infringements on the faculty's research processes. They may also create (unintended) disproportionate additional labors for faculty who are disabled and/or have daily caretaking obligations for children, elders, and loved ones. One question posed by Council was whether the policy's rules are more prescriptive than federal guidelines. If so, imposing additional UC guidelines on top of federal guidelines will create confusion and wasted labor.

I trust that the attached standing committee responses will further enrich the Senate's consultation on this important matter.

Sincerely yours,

A handwritten signature in dark ink, appearing to read "Dylan Rodríguez", is written over a light blue horizontal line.

Dylan Rodríguez
Professor of Media & Cultural 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



COMMITTEE ON FACULTY WELFARE

April 21, 2020

To: Dylan Rodriguez
Riverside Division Academic Senate

From: Abhijit Ghosh, Chair
Committee on Faculty Welfare

Re: [Systemwide Review] Proposed Revised Policy: Presidential Policy
Business and Finance Bulletin G-28: Travel Regulations

The Committee on Faculty Welfare (CFW) met remotely on April 14th and discussed G-28 travel regulations. Overall, the committee finds that majority of the changes involve additional paperwork and documentation on top of already heavy administrative burdens placed on faculty. Moreover, we have additional serious concerns regarding the modifications proposed in the two specific categories below, and thus the CFW strongly opposes these.

1. Requiring documentation to justify each day of travel is excessive, unnecessary, and often impossible, if not insulting. For example, many field-intensive disciplines such as anthropology, earth sciences, and entomology, among others, require month-long field trips in remote parts of the world, involving backpacking and hiking. Providing documents for each day to prove where faculty members were and what they were doing would be practically impossible. In addition, it will put enormous burdens on faculty involving time-consuming paperwork, significantly hindering their research and related teaching. If this change aims at identifying significant personal time during business travel, appropriate procedures are already in place (section I.2). The CFW strongly oppose this modification.

2. The CFW appreciates suggestions to use sustainable modes of travel but notes that most UC faculty members already support environmentally favorable measures. Because they are environmentally conscious, they make positive choices to reduce our carbon footprint as much as possible given the logistical, economical and time constraints. The CFW is concerned that these suggestions may become *de facto* mandatory policy, placing additional undue burdens on faculty.



COMMITTEE ON DIVERSITY, EQUITY, AND INCLUSION

April 20, 2020

To: Dylan Rodriguez
Riverside Division Academic Senate

From: Xuan Liu, Chair
Committee on Diversity, Equity, and Inclusion

Re: Presidential Policy Business and Finance Bulletin G-28: Travel Regulations.

The Committee on Diversity, Equity, and Inclusion (CODEI) reviewed the proposed Presidential Policy Business and Finance Bulletin G-28: Travel Regulations at its April 2 meeting and applauds the shift to gender-neutral language. The committee is also supportive of encouraging sustainable travel, and inclusion of the new section that offers recommendations. However, the committee would like to note that any future imposition of these recommendations as requirements would have to take into consideration appropriate accommodations for disabilities, and unequal impact on members of the community who may not have access to efficient modes of transportation, or an unequal impact on junior researchers and faculty whose career progression may be impacted by avoiding unnecessary travel.

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SANTA BARBARA • SANTA CRUZ

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Henning Bohn, Chair
Debra Blake, Executive Director

May 13, 2020

To: Kum-Kum Bhavnani, Chair
Academic Council

From: Henning Bohn, Chair
Academic Senate

A handwritten signature in cursive script, reading "Henning Bohn", is written over the printed name.

Re: Proposed Revised Presidential Policy on Travel Regulations

The Santa Barbara Division distributed the proposed revised Presidential Policy on Travel Regulation to its Council on Faculty Welfare, Academic Freedom, an Awards (CFW), Council on Planning and Budget, Committee on Research Policy and Procedures, and Committee on Diversity and Equity. The members of CFW unanimously endorsed the proposed revisions without further comment. The remaining groups responded that they did not wish to opine on this issue.



OFFICE OF THE ACADEMIC SENATE

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April 21, 2020

Professor Kum-Kum Bhavnani
Chair, Academic Senate
University of California
1111 Franklin Street, 12th Floor
Oakland, CA 94607

Re: Proposed Revisions to UC Travel Regulations G28

Dear Professor Bhavnani:

The proposed revisions to UC Travel Regulations G28 was circulated to standing Divisional Senate committees for review. A response was received from the committee on Faculty Welfare (CFW). The proposed revisions and committee response were discussed at the Divisional Senate Council meeting on April 13, 2020. The inclusion of a sustainable travel section was appreciated; however Senate Council did not feel that the revisions adequately reflected the University Policy on Sustainable Practices. For example, the reimbursement structure would need to include all of the costs of cleaner forms of travel such that air travel does not become the tacit default based on the University reimbursement for travel. A majority of Senate Council opposed the revisions to UC Travel Regulations G28.

Sincerely,

A handwritten signature in dark ink, appearing to read "Maripat Corr", is written over a light blue horizontal line.

Maripat Corr, Chair
San Diego Divisional Academic Senate

Cc: Steven Constable, Vice Chair, San Diego Divisional Academic Senate
Ray Rodriguez, Director, San Diego Divisional Academic Senate
Hilary Baxter, Executive Director, Systemwide Academic Senate



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SANTA CRUZ, CALIFORNIA 95064

Office of the Academic Senate
SANTA CRUZ DIVISION
125 CLARK KERR HALL
(831) 459 - 2086

May 20, 2020

KUM-KUM BHAVNANI, Chair
Academic Council

Re: Presidential Policy Business and Finance Bulletin G-28: Travel Regulations

Dear Chair Bhavnani,

The Santa Cruz Division of the Academic Senate has reviewed and discussed the proposed revisions to Presidential Policy Business and Finance Bulletin G-28: Travel Regulations. The Committees on Affirmative Action and Diversity (CAAD), Academic Freedom (CAF), Academic Personnel (CAP), Development and Fundraising (CDF), Faculty Welfare (CFW), International Education (CIE), and Research (COR) have provided comments. The committees voiced appreciation for the inclusion both of gender-neutral language in and of “best practices” in the policy. There are, however, three areas of concern around which the committees coalesced: trip cancellation (CAP, CAAD, CFW, and CAF); sustainable travel (CAP, CAAD, CAF, and CDF); and travel documentation (CIE, CDF, and COR).

Below are the comments organized into the three primary areas of concern, followed by a list of specific recommendations.

Trip Cancellation

CAP, CAAD, CFW, and CAF all express particular concerns about the proposed revisions to the policy addressing changes and cancellations of travel arrangements due to “circumstances beyond the traveler’s control.” Specifically, there is not clear guidance of *when* a trip *should* be cancelled. Given the climate created by the COVID-19 pandemic, one could reasonably assume that there will be increasing pressure for employees to cancel travel plans when showing any indications of illness. Yet, the revised policy does not speak to cases when travel must be cancelled. Without clear guidance, the responsibility and burden of the decision fall directly on the faculty member and, without an objective measure, so too does the onerous task of recouping costs associated with cancellation. The costs are thus shifted onto the faculty.

The costs associated with cancellations is also expressed in other areas of the proposed revisions. For example, as CAP and CFW note, the policy encourages faculty to seek the lowest fare, but those fares are usually the least flexible, leading to the issues raised above regarding change/cancellation costs. The policy also suggests that travel arrangements be made through university travel services such as the Connexus

website. However, if Connexus offers non-flexible fares, it does not seem fair that the cost of changing/cancelling falls on the faculty.

If faculty are responsible for bearing the costs associated with changes/cancellations, such costs may deter faculty (particularly junior faculty) from accepting invitations to deliver lectures and attend conferences, as noted by CAP and CFW. This, combined with other proposed revisions discussed below, could have a real impact on the advancement of junior faculty in those disciplines where presentation of work is essential and/or conventional.

Sustainable Travel

While the committees generally support the University's effort to reduce its carbon footprint, several committees raise significant questions regarding the degree to which sustainable travel should be presented as recommendations or whether it should be written into policy. CAAD points out that "the proposed language tended to place the moral responsibility for such travel on the faculty." CAP and CAF agree that the burden of sustainable travel should be placed on the University, and any references to a preference for sustainable travel should be worded as suggestions rather than requirements.

As mentioned above, for certain disciplines, travel for presentation of work is essential for advancement. CIE suggests that it behooves the University to explore online presentation options as travel is often for the presentation of work as a requirement for tenure. This is of particular importance given the current restrictions placed on travel and gathering presented by the onset of the COVID -19 virus. "However," warns CIE, "our current physically distanced, remote work modus operandi should underscore the profound value of 'three-dimensional' human interaction" and suggests that "under the looming austerity, vague travel justification reporting language might be used to curtail business travel."

Travel Documentation

Virtually all of the responding committees are highly concerned about the proposed changes with respect to the documentation of travel activities. In sum: the committees find them to be overly burdensome. COR argues that the proposed revisions impose "in the best of cases, a substantial new and additional paperwork burden on the academic traveler." CDF underscores this point: "The requirements for documenting each day of travel seem potentially both overly burdensome and not always possible, depending on the nature of the meeting, particularly for informal meetings." This could have a chilling effect on activities related to the creation of international partnerships where, as CIE observes, such relationships are often formed through less formal face to face interactions. This is echoed by CAAD, who points out that "face-to-face networking has an intrinsic value that often cannot be replicated through Zoom meetings." The greatest burden perhaps would be on those conducting extended field research, as COR and CIE make clear. Lastly, the proposed language appears to create conflict with other provisions in the policy, particularly those that relate to sustainable travel. Specifically, the requirement to document activities for each travel day appears to conflict with the suggestion in the sustainability section to "make travel more efficient by combining multiple meetings and events whenever possible," thus creating a "counter-incentive to combine meetings unless they happen to be one day after another" (CDF).

Specific Recommendations

- The policy should explicitly allow for reimbursement of both cancellation fees and remaining nonrefundable expenses when a traveler has had to cancel due to circumstances beyond

their control. (CAP/CAF/CFW)

- The policy should provide clarification regarding university procedures and policies related to travel cancellation insurance. (CAP/CAAD/CAF/CFW)
- The policy should provide for the coverage of fees for necessary baggage and international cell phone expenses, as these are part of the research expenses of some faculty. (CAP/CAF)
- The Policy should provide clarity on whether “offsets” are allowable expenses or not. (CDF)
- The Policy should clarify that some grants have more stringent rules about reimbursement for travel in premium classes, and that those rules need to be met as well. (CAP/CFW)
- In the subsection related to Sustainability Policy (p. 23), change the word "may" to "should" so the following statement reads: "University employees traveling or supervising staff that travel **should** consider the following." (CDF)
- In the subsection related to Substantiation of Expenses (p. 40), insert the words "one or more of the following" in the sentence that begins: "Such documentation should include:" so that it reads “Such documentation should include **one or more of the following:**" (CDF)

Finally, CFW provides a fine summary of the general sentiment of all the responding committees, commenting “Faculty are generally very frugal with their travel funds, and the regulations on their use can often be a serious burden, especially in times of emergency. Removing bureaucratic hurdles will allow faculty to more easily travel for research, performance, and professional development.”

On behalf of the Santa Cruz Division, I thank you for the opportunity to comment on these important changes to policy and hope that the comments prove to be helpful in its continued evolution.

Sincerely,

Kimberly Lau, Chair
Academic Senate, Santa Cruz Division

cc: Jessica Taft, Chair, Committee on Academic Freedom
Lynn Westerkamp, Chair, Committee on Academic Personnel
Elizabeth Abrams, Chair, Committee on Affirmative Action and Diversity
Susan Gillman, Chair, Committee on Development and Fundraising
Grant McGuire, Chair, Committee on Faculty Welfare
Jeremy Hourigan, Chair, Committee on International Education
Jin Zhang, Chair, Committee on Library and Scholarly Communication
Paul Roth, Chair, Committee on Research

May 5, 2020

Kimberly Lau, Chair
Academic Senate

Re: Review of Proposed Revised Presidential Policy on Travel Regulations

Dear Kim,

The Committee on Affirmative Action and Diversity (CAAD) reviewed the Proposed Revised Presidential Policy on Travel Regulations. CAAD noted, and particularly appreciated, that gender neutral language was incorporated into the revisions.

In our review of the proposed revised policy, CAAD also discussed the detailed response submitted by the Committee on Academic Personnel (*CAP Chair Lynn Westerkamp to Senate Chair Kim Lau Re Systemwide Review of Proposed Presidential Policy “Travel Regulations” – April 17, 2020*). CAAD endorses CAP’s recommendations. CAAD particularly wishes to note CAP’s observation that trip cancellation insurance was not accounted for in the policy revisions. CAAD concurs with CAP that purchasing such insurance should be incentivized (via reimbursement or outright purchase) rather than discouraged, which is especially relevant to graduate students and junior faculty for whom the expense of absorbing the full cost of a cancellation (as in the case of illness) would be particularly burdensome. CAAD, like CAP, would also like to see the policy explicitly address cell phone expenses incurred while traveling internationally.

CAAD also had comments about the addition of the language on sustainable travel (Section V.D.7). In particular, while we sympathize with the impulse to encourage greater conscientiousness about the impact of professional travel on the environment, and the further impulse to build this awareness into legislation, the committee felt that the proposed language tended to place the moral responsibility for such travel on the faculty. On the contrary, CAAD believes that because the university rewards public displays of research activity (e.g., conference presentations, participation in live performances, mounting exhibits) in evaluating currency in the field, the responsibility for the environmental impacts of such travel should be on the university and not on the faculty.

In the same vein, the committee agrees that changing how conferences are conducted to allow for remote participation is something that needs to be discussed amongst conference planners and professional societies. Chances are, in light of COVID-19, these conversations are already underway. Conferences are often the major source of funding for many societies and journals, and appearances at conferences are valuable for faculty demonstrating their active professional participation in their field.

The guidelines maintain that travel to conferences should only be conducted when necessary to reduce our carbon footprint. However, this does not seem realistic for faculty in certain fields, where the road to tenure often involves significant travel to exhibitions or festivals to present their work. Necessity of travel should be assessed based on the context of the trip and its link to tenure. In certain fields, it’s often not possible to present work online. Further, face-to-face networking has an intrinsic value that often cannot be replicated through Zoom meetings.

CAAD thus suggests that the language of this section be recrafted to emphasize sustainable travel as a suggestion. Rather than be embedded in the policy itself, perhaps this would be better presented in

an introductory statement noting that travel should be reduced when possible, being mindful of our ever-warming planet.

Thank you for the opportunity to respond on this matter.

Sincerely,

\s\

Elizabeth Abrams, Chair

Committee on Affirmative Action and Diversity

cc: Lynn Westerkamp, Chair, Committee on Academic Personnel
Grant McGuire, Chair, Committee on Faculty Welfare
Paul Roth, Chair, Committee on Research
Jessica Taft, Chair, Committee on Academic Freedom
Jeremy Hourigan, Chair, Committee on International Education
Jin Zhang, Chair, Committee on Library and Scholarly Communication
Susan Gillman, Chair, Committee on Development and Fundraising

May 1, 2020

Kimberly Lau, Chair
Academic Senate, Santa Cruz Division

RE: Systemwide Review of Proposed Presidential Policy “Travel Regulations”

Dear Kim,

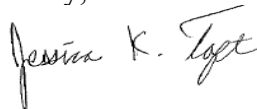
The Committee on Academic Freedom (CAF) has reviewed the proposed changes to the Presidential Policy on “Travel Regulations.” While the changes themselves are minimal and we have no objections to these specific revisions, we concur with the thoughtful commentary by the Committee on Academic Personnel (CAP) regarding the increased need for clarity regarding travel cancellations and faculty responsibility for costs associated with cancellations.

To the extent that risks of potential costs to faculty could discourage travel that might be important to some types of scholarship and/or professional advancement, how these issues are addressed could have implications for academic freedom. Echoing CAP, we therefore suggest:

- A) The policy explicitly allow for reimbursement of both cancellation fees and remaining nonrefundable expenses when a traveler has had to cancel due to circumstances beyond their control.
- B) Clarification regarding university procedures and policies related to travel cancellation insurance.
- C) Coverage of fees for necessary baggage and international cell phone expenses, as these are part of the research expenses of some faculty.

Thank you for the opportunity to comment on the policy.

Sincerely,



Jessica Taft, Chair
Committee on Academic Freedom

cc: Lynn Westerkamp, Chair, Committee on Academic Personnel
Elizabeth Abrams, Chair, Committee on Affirmative Action and Diversity
Grant McGuire, Chair, Committee on Faculty Welfare
Jeremy Hourigan, Chair, Committee on International Education
Jin Zhang, Chair, Committee on Library and Scholarly Communication
Paul Roth, Chair, Committee on Research
Susan Gillman, Chair, Committee on Development and Fundraising

April 17, 2020

Kimberly Lau, Chair
Academic Senate

Re: Systemwide Review of Proposed Presidential Policy “Travel Regulations”

Dear Kim,

The Committee on Academic Personnel (CAP) reviewed the proposed Presidential Policy on Travel Regulations during its meeting of March 12, 2020. The committee recognized the significance of travel, which is closely linked to research productivity and recognition, and the importance of this associated proposed policy. As such, members conducted a thorough review and raised several questions and concerns.

One set of concerns has to do with the issue of changes and cancellations of travel arrangements due to “circumstances beyond the traveler’s control,” such as the traveler falling sick. For junior faculty in particular, the risk of having to absorb travel costs when plans change could be a deterrent from accepting opportunities to travel to conferences and give invited talks. In light of the present COVID-19 crisis, members noted that the need for clarity in these situations will be even more important going forward. Even after the crisis, there is likely to be much more societal pressure for people to cancel travel when sick. Section B.5 does partially address the issue of cancellations by noting,

“Charges or lost refunds resulting from failure to cancel reservations shall not be reimbursed unless the traveler can show that such failure was the result of circumstances beyond the traveler's control.”

However, this does not explicitly address the situation in which travel is cancelled as far in advance as possible, but charges are still incurred because the booking is nonrefundable or carries cancellation fees. Since the policy encourages travelers to seek the lowest fare, university travelers are particularly likely to have bookings that incur fees for changes and cancellations. Section B.3.c also states that any “cash advance must be returned immediately if an authorized trip is cancelled or indefinitely postponed.” Having to return this advance immediately could be a hardship for some travelers, particularly graduate students and junior faculty. Perhaps the advance could be returned after some number of days so that the issue of how the cancellation fees are paid for can

be resolved. Section B.3.c also states that a “nonrefundable ticket associated with a cancelled trip must be used for the employee’s next business trip.” This may not be possible if, for example, the ticket is with an international carrier and the employee’s next business trip is domestic.

Related to this discussion of change and cancellation fees, is that the policy encourages travelers to use university travel services such as the Connexus website. Often these channels push travelers to the lowest, often inflexible, fares. Travelers worried about cancellation risk might consider buying trip cancellation insurance, but the policy does not address the position of the university on this. Presumably, trip cancellation insurance at present is not reimbursable.

There were two more concerns raised by members having to do with travelers potentially having to absorb costs and thus potentially deterring travel beneficial to their careers.

- Most airlines now charge extra fees just to reserve a specific seat, even when flying coach, and to check baggage. Section 2.a says that baggage fees policy can be set by campus chancellors. It might be beneficial to state that at least 1 bag fee will be reimbursable by system policy. Faculty in the Arts may need explicit reassurance that extra bag fees for exhibition materials and musical instruments/equipment will be reimbursable as well.
- There is no policy regarding extra cell phone expenses when travelling internationally. Having cell phone and internet connectivity has become a necessity for almost everyone, so oftentimes travelers have to add at their own expense international roaming to their cell phone subscription plans while travelling.

One other point raised by members was about Section 2.a which states that business or first-class may be authorized in particular circumstances. It might be worth noting that some grants have more stringent rules about reimbursement for travel in premium classes, and that those rules need to be adhered to as well.

CAP appreciates the attempt to make travel regulations and cost reimbursements transparent with this policy.

Sincerely,



Lynn Westerkamp, Chair
Committee on Academic Personnel

cc: Elizabeth Abrams, Chair, Committee on Affirmative Action and Diversity
Grant McGuire, Chair, Committee on Faculty Welfare
Paul Roth, Chair, Committee on Research
Jessica Taft, Chair, Committee on Academic Freedom
Jeremy Hourigan, Chair, Committee on International Education
Jin Zhang, Chair, Committee on Library and Scholarly Communication
Susan Gillman, Chair, Committee on Development and Fundraising

May 7, 2020

KIMBERLY LAU, Chair
Academic Senate, Santa Cruz Division

Re: Proposed Revised Presidential Policy on Travel Regulations

Dear Kim:

The Committee on Development and Fundraising (CDF) has reviewed the Proposed Revised Presidential Policy on Travel Regulations and has the following comments, based on our discussion at our April 30, 2020 meeting.

1. The requirements for documenting each day of travel seem potentially both overly burdensome and not always possible, depending on the nature of the meeting, particularly for informal meetings. We suggest inserting the words "one or more of the following" prior to the colon in the sentence that begins: "Such documentation should include:" (p. 41). The revised sentence would read "Such documentation should include one or more of the following:"
2. The requirement to document activities for each travel day appears to conflict with the suggestion in the sustainability section to "make travel more efficient by combining multiple meetings and events whenever possible." The requirement to document activities for each travel day creates a counter-incentive to combine meetings unless they happen to be one day after another. For example, if a meeting in Washington, DC is on Tuesday and a meeting in New York on Friday, with no "business activities" on Wednesday/Thursday, the revised policy seems to suggest that the hotel/incidental costs would not be legitimate expenses for the Wednesday/Thursday. This apparent conflict creates an unintended incentive to fly back and forth from California for the two meetings, rather than combine them in one trip. This would run counter to the UC's carbon reduction goals and might even be more expensive.
3. In the Sustainability Policy (p. 23), we suggest changing the word "may" to "should" in the following statement: "University employees traveling or supervising staff that travel may consider the following." Such a wording change would not predetermine or dictate the outcome of that consideration but it makes a stronger suggestion to consider the important issue of whether or not travel is really necessary in the first place. If we're serious as a University about cutting carbon emissions, this is an area that demands attention. Even with this proposed revision, the statement is still relatively modest, but it's better than simply stating the obvious that faculty "may" consider this.
4. The committee was unsure if offsets are an allowable expense. Can this be clarified or otherwise considered? There are clearly arguments on both sides, given the unreliability and variable legitimacy of offset programs, but CDF thinks it's worth being explicit about decision-making on this point.

We appreciate the opportunity to comment.

Sincerely,

/s/

Susan Gillman, Chair

Committee on Development and Fundraising

cc: Jessica Taft, Chair, Committee on Academic Freedom
Elizabeth Abrams, Chair, Committee on Affirmative Action and Diversity
Lynn Westerkamp, Chair, Committee on Academic Personnel
Grant McGuire, Chair, Committee on Faculty Welfare
Jeremy Hourigan, Chair, Committee on International Education
Jin Zhang, Chair, Committee on Library and Scholarly Communication
Paul Roth, Chair, Committee on Research

May 7, 2020

Kimberly Lau, Chair
Academic Senate, Santa Cruz Division

Re: Systemwide Review of Proposed Revisions to the Presidential Policy on Travel Regulations

Dear Kim,

During its meeting of April 2, 2019, the Committee on Faculty Welfare (CFW) reviewed the proposed revisions to the Presidential Policy on Travel Regulations. CFW agrees with, and would like to reiterate several points of concern raised by the Committee on Academic Personnel (CAP)¹:

1. The policy does not speak to an event when travel must be cancelled. If change and/or cancellation costs fall on faculty, it may deter faculty (particularly junior faculty) from accepting invitations to speak and attend conferences.
2. The policy encourages faculty to seek the lowest fare, but those fares are usually the least flexible, leading to issue 1. above regarding change/cancellation costs.
3. The policy suggests that travel arrangements be made through university travel services such as the Connexus website. However, if Connexus offers non-flexible fares, it does not seem fair that the cost to change/cancel falls on the faculty.
4. The policy says that business class may be used with a doctor's note, however some grants like NSF do not cover this.
5. There is no mention of travel insurance fees.
6. The policy does not include information on additional travel costs due to necessary equipment or baggage fees. This is particularly relevant for faculty in the Arts.
7. The policy does not speak to international travel and necessary cell phone plan expenses.

Faculty are generally very frugal with their travel funds, and the regulations on their use can often be a serious burden, especially in times of emergency. Removing bureaucratic hurdles will allow faculty to more easily travel for research, performance, and professional development.

¹ Westerkamp to Lau, 4/17/20, Re: Systemwide Review of Proposed Presidential Policy "Travel Regulations"

Thank you for the opportunity to opine.

Sincerely,

/s/

Grant McGuire, Chair

Committee on Faculty Welfare

cc: Jessica Taft, Chair, Committee on Academic Freedom
Elizabeth Abrams, Chair, Committee on Affirmative Action and Diversity
Lynn Westerkamp, Chair, Committee on Academic Personnel
Paul Roth, Chair, Committee on Research
Jeremy Hourigan, Chair, Committee on International Education
Jin Zhang, Chair, Committee on Library and Scholarly Communication
Susan Gillman, Chair, Committee on Development and Fundraising

May 11, 2020

Kimberly Lau, Chair
Academic Senate

RE: Systemwide Review of Proposed Presidential Policy: Travel Regulations

Dear Kim,

The Committee on International Education reviewed the proposed Presidential Policy on Travel Regulations. The most substantive changes are: (1) the use of gender neutral language, (2) the inclusion of “best practices”, and (3) the addition of new reporting requirements.

The committee supports the revision of the policy to incorporate gender neutral language throughout. In a general way, the committee supports the inclusion of travel-related “best practices” (V.D.7a-b) to promote sustainability and resource use efficiency. The committee interprets these best practices as common-sense guidance, rather than directives and requirements.

The committee finds new reporting requirements (V.I.2a) to be problematic. While CIE recognizes the necessity of providing justification for university-related travel, the new policy language dramatically increases the documentation workload required to justify travel. Notably, the traveler would be required to provide “conference brochures” and daily itineraries at an unprecedented level of granularity. These new reporting requirements burden travelers and business offices alike with a great deal of new paperwork and processing overhead. Before this policy is instituted, the University of California should consider the cost-benefit ratio of these new reporting requirements.

The policy is vague about what constitutes adequate documentation of less-formal activities, which may create tension between travelers and their business offices. The committee is concerned that these reporting requirements might create inflexibility on the reimbursement side, potentially limiting a traveler’s ability to leverage a trip to conduct other less formal and less structured, but nonetheless important, university business. For instance, spending an additional day after a conference meeting face-to-face with colleagues and their students or traveling to a nearby university to give an academic talk is a hugely important component of the academic enterprise that is not readily justified with a conference brochure. In recent discussions between the administration and the Committee on International Education, overseas outreach to regional universities has been encouraged when faculty have already invested the time and energy to travel abroad, laying the seeds for potential future international collaborations. This type of activity would not only be discouraged, but would be made extremely difficult if these new requirements were to be put in place.

If anything, our current physically distanced, remote work modus operandi should underscore the profound value of “three-dimensional” human interaction. This is not to say that teleconferences are ineffective or inefficient, but they cannot replace potentially alchemical interactions that transpire when the academic community is allowed to meet in-person. Under the looming austerity, vague travel justification reporting language might be used to curtail business travel. Perhaps, we should assume that our university’s actors will operate in good faith and in keeping with best practices and not institute new onerous and potentially limiting requirements.

CIE appreciates the opportunity to comment on the proposed policy.

Sincerely,

A handwritten signature in black ink, appearing to read "Jeremy Hourigan", is written over a light gray rectangular background.

Jeremy Hourigan, Chair
Committee on International Education

cc: CAP Chair Westerkamp
CFW Chair McGuire
COR Chair Roth
CAF Chair Taft
CAAD Chair Abrams
COLASC Chair Zhang
CDF Chair Gillman

May 7, 2020

KIMBERLY LAU, Chair
Academic Senate, Santa Cruz Division

Re: Systemwide Review of Proposed Presidential Policy “Travel Regulations”

Dear Kim,

The Committee on Research (COR) has reviewed the proposed changes to the Presidential Policy on “Travel Regulations.” In addition to the concerns noted by the Committees on Affirmative Action and Diversity (CAAD), Academic Personnel (CAP), Development and Fundraising (CDF), and Academic Freedom (CAF), COR registers the following observations. Referencing the redlined version, COR notes that under Section I (“Reporting Travel Expenses,” p. 40), subsection 2, “Completion of a travel expense claim,” Part a, “Substantiation of expenses,” the new wording (as indicated by the color-coding) on p. 41 (copy attached) is very troubling. It imposes, in the best of cases, a substantial new and additional paperwork burden on the academic traveler, insofar as requiring documentation be submitted “that justifies *each day* on travel status” (emphasis added), including times and places of all meetings and all individuals involved in those meetings. This seems quite onerous in and of itself. *However, and this is COR’s primary concern, it seems completely inappropriate for researchers who spend months in the field on research projects.* One COR member has noted that it would not be unusual for him to spend 60-90 days in the field. It strikes COR as inappropriate as well as a serious obstacle to field research to require people doing work of this sort to meet the reporting requirements as currently stipulated in the proposed change of regulations. More generally, as already noted, the degree of specificity required (individuals, times, places, dates, times, topics, other attendees) seems tailored to bureaucratic interactions, not academic ones. For a typical academic context, COR finds any need for reporting at the level of detail demanded difficult to comprehend or justify. But COR’s greatest concern involves the gratuitous burden this requirement poses to all extended field research.

Thank you for the opportunity to comment on the policy.

Sincerely,
/s/
Paul A. Roth, Chair
Committee on Research

cc: Jessica Taft, Chair, Committee on Academic Freedom
Elizabeth Abrams, Chair, Committee on Affirmative Action and Diversity
Lynn Westerkamp, Chair, Committee on Academic Personnel
Grant McGuire, Chair, Committee on Faculty Welfare
Jeremy Hourigan, Chair, Committee on International Education
Jin Zhang, Chair, Committee on Library and Scholarly Communication
Susan Gillman, Chair, Committee on Development and Fundraising



UNIVERSITY COMMITTEE ON RESEARCH POLICY (UCORP)
Andrew Baird, Chair
Email: anbaird@ucsd.edu

University of California
Academic Senate
1111 Franklin Street, 12th Fl.
Oakland, California 94607

May 20, 2020

KUM-KUM BHAVNANI
CHAIR, ACADEMIC COUNCIL

RE: Revised Presidential Policy "Travel Regulations"

Dear Kum-Kum,

UCORP discussed the revised draft Presidential Policy, Travel Regulations, currently under systemwide review, at its meeting on May 11, 2020. Members had comments on two of the revisions:

1. UCORP was concerned about the additional requirements in Section V.I., Reporting Travel Expenses. The new documentation needed for justifying each day of travel presents an unnecessary additional administrative burden on faculty members, particularly on scientists out for prolonged field work and those who travel frequently.
2. UCORP members felt that the travel policy statements on sustainability (Section V.D.7.) could have been stronger, particularly in view of the Academic Senate's recent stance on the need to address climate crisis through policy implementation. In addition, some members thought that the "suggestions" for travelers to consider more fuel efficient modes of transportation were somewhat condescending and out of place in a list of policy procedures. Members also questioned the mention of specific companies ("Hertz and National/Enterprise") in this section.

On behalf of UCORP, thank you for the opportunity to comment on the revised policy.

Sincerely,

A handwritten signature in black ink, appearing to read "A Baird", is written over a light blue circular stamp.

Andrew Baird
Chair, University Committee on Research Policy