Travel Grant Process
(Updated: 9/14/2022)

Please note: The Travel Grant is a *==reimbursement==* of travel expenses

Purpose:
- To provide opportunity for Southeastern students to enhance both their academic and leadership skills.
- To defer the costs associated with academic and/or leadership travel for students.

Quick Overview:
- ==**EIGHT TO TEN WEEKS**== before the date of travel, the student(s) traveling **and their faculty advisor** will meet with the graduate assistant for an informational meeting before submitting the online application. Please log into the SGA grant system to schedule a meeting. If you have any issues or questions regarding the meeting scheduling process, please email sga@southeastern.edu.
- The student will submit a travel grant application on the SGA website ==**AT LEAST SEVEN WEEKS**== prior to travel.
- The grant application will be reviewed by the SGA Advisor & Graduate Assistant within a week. If there are questions regarding the application or budget, the applicant may be asked to provide clarification or revisions.
- The SGA Vice President or a Senator will author the Travel Grant bill.
- The grant applicant and faculty advisor are emailed the dates they will need to attend the Appropriations Committee meeting and SGA Senate meeting to speak on behalf of their bill and to answer any questions.
  - The Appropriations Committee is a committee that reviews and makes recommendations on all financial bills for the student Senate. You will attend this meeting first.
  - You will attend the Senate meeting the following Monday after the Appropriations Committee meeting. The Senate will consider the Appropriation Committee's recommendation as well as your presentation and then vote on whether to pass the legislation.
- If passed, the applicant and faculty advisor will be provided a list of the required forms via email. **ALL** necessary forms must be submitted at least 3 weeks before travel.
  - The forms may include, but are not limited to the following:
    - All attendees MUST complete the Safe Driver training course before the Spend Authorization can be created.
    - Off Campus Visitation form
    - Supplier Set-Up form and Substitute W9 forms
    - Non State Employee form
    - Hotel Overage form, Vehicle Rental form, etc.

- Additionally, the faculty advisor will complete a [Spend Authorization](#) in Workday at least two weeks before travel.
  - In this same communication, the applicant will be asked to schedule a second meeting with the SGA Graduate Assistant to take place on a date ==WITHIN FIVE BUSINESS DAYS OF RETURNING== from travel.

- At the second meeting upon return, the Expense Report process will be covered. The grant recipient signs a paper expense report form and reviews all other documentation that will be attached with their online expense report. The Workday expense report shall be completed by the student's faculty advisor or their administrative assistant ==WITHIN FIVE BUSINESS DAYS OF RETURNING== from travel.

Detailed Steps:

Step 1: The student should visit the [SGA grant system](#) to set up a meeting with the Graduate Assistant **BEFORE** filling out the travel grant application. This meeting should take place ==EIGHT TO TEN WEEKS== prior to travel. The meeting will last approximately 30 minutes. The graduate assistant will review the travel process and procedures and provide the student and their advisor with a checklist.

- Eligibility Requirements
  - Semester and cumulative GPA of at least 2.5. If students fall below a 2.5 at any time during the grant process, the grant process will cease and be revoked.
  - In good standing with the university and free of any academic or disciplinary probation/suspension.
  - Attend a mandatory travel informational meeting with the SGA graduate assistant before applying for a travel grant.

Step 2: The student will fill out the online application for a travel grant in the [SGA grant system](#).
- Applications that do not meet the seven week deadline will not be considered.
- The online application must include the following information to be considered complete:
  - W#'s for all students traveling
  - Faculty advisor information
  - General conference information
  - A breakdown of the funds requested from SGA.
    - Reimbursement may be requested for conference registration, mileage, lodging, airfare, or other transportation.
- No individual travel request (1-2 students) may exceed $500.
- No group travel (3 or more students) may exceed $1,000.
  - A group must submit a single travel grant application if the travel they are applying for meets the following conditions:
    - Applying for travel for the same conference
    - Same official conference dates
    - Same location
    - Same faculty advisor

Important links regarding travel guidelines and policies:

- Key Parts of Travel Guidelines:
  - https://www.southeastern.edu/admin/controller/facultystaff/travel/Travel_Checklist_010121.pdf
  - State Travel Website:
  - https://www.doa.la.gov/doa/ost/
- Travel forms:
  - https://www.southeastern.edu/admin/controller/facultystaff/travel/index.html
  ***Travel regulations are often updated, so please use link above for forms

Step 3: After the online application is received, the grant application will be reviewed by the SGA Advisor & Graduate Assistant. If there are questions regarding the application or budget, the applicant may be asked to provide clarification or revisions.

Step 4: Following any clarification or revisions, the SGA Vice President or a senator will author the Travel Grant bill. The grant applicant and faculty advisor are emailed the dates they will need to attend the Appropriations Committee meeting (meets Tuesdays at 4:45 pm) and SGA Senate meeting (meets Mondays at 5 pm) to speak on behalf of their bill and to answer any questions.

    4A: You will first present your grant proposal at the Appropriations Committee meeting, giving reasons why the purpose for which you are requesting the grant is beneficial to the student body. The committee members may ask questions for clarification or express concerns for you to address. You may also take this feedback as an opportunity to adjust the presentation you will give to the student Senate accordingly. The Appropriations Committee will give their recommendation to the Senate based on this meeting.

    4B: On the Monday following the Appropriations Committee meeting, you will present your grant proposal to the student Senate to be voted on.

Step 5: At the Senate meeting, the SGA Senate votes on the bill, and signatures will be obtained from the SGA President, SGA Vice President, SGA Advisor, Director of the Office for Student Engagement, and the Vice President of Student Affairs. If the bill is passed, please allow three weeks for legislation to be approved and budgets to be set up. You cannot complete a spend authorization until this process is complete.

- **Requirements if bill passes:**
  - Any student traveling, regardless of whether they plan to drive, must complete the Safe Driver course BEFORE a Spend Authorization can be created.
  - An Off Campus Visitation form should be turned in at least 3 weeks before travel. It should be turned into the Office for Student Engagement located in Student Union Room 2307.
  - All additional documents must be submitted to the graduate assistant at least 3 weeks before travel. This can include, but it is not limited to: Supplier Set-Up forms, Substitute W9 forms, Non State Employee forms, Vehicle Rental forms, Hotel Overage forms, etc

Step 6: The faculty advisor must complete a [spend authorization](#) on Workday at least two weeks before travel. (Please look for Cost Center, Program Center, Ledger Account, and Spend Category numbers in the "Next Steps" email that was sent after legislation passed).

Step 7: Within 5 business days of returning from the conference, the student must meet with the SGA Graduate Assistant for an Expense Report Meeting. If two separate cost centers were used, the the signature of the additional cost center head must be obtained before the expense report is turned in to the travel office. When entering travel information on the Expense Report in Workday, attendees must include both cost center numbers, both ledger numbers and the program number supplied to them for SGA travel.
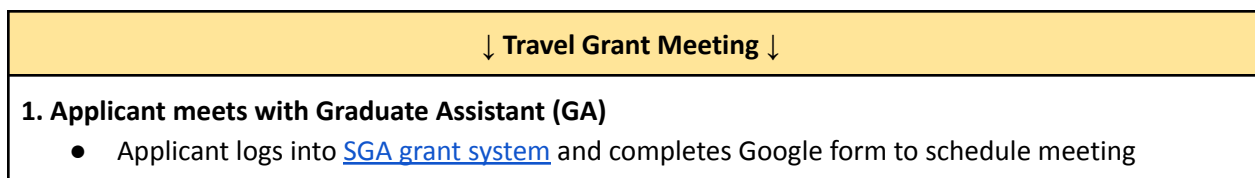
What to bring:
- The [expense report form](#)
- Receipts that show a balance of $0 or say paid in full. Note: Only students who are listed on the grant may be reimbursed. The students' names MUST appear on the receipts in order to be reimbursed.
- Bank and/or credit card statement(s) with the corresponding transactions for receipts amounts, verifying purchaser
- Conference Material: Some form of conference material with dates, location, and name of conference must be turned in (e.g. conference website with dates and location, copy of the cover of a brochure, an official agenda, etc.)
- Conference Report: A 1-2 page detailed summary that includes:
  - How the trip improved your leadership ability
  - How the trip benefited the Southeastern community
  - How the trip enhanced Southeastern's image
  - At least 3 pictures from the trip attached to the report

Violations: Students will lose grant privileges for two academic years dues to any of the following violations:
- Failure to submit receipts and expense report.
- Purchases made that were not approved by SGA.
- Failure to submit a completed report following the trip.

Process Flow Chart

↓ Travel Grant Meeting ↓
1. Applicant meets with Graduate Assistant (GA) ● Applicant logs into [SGA grant system](#) and completes Google form to schedule meeting

- GA confirms meeting time via email
- GA meets with applicants and reviews grant processes (policies, online application, legislative process, and post travel Expense Report meeting). Applicants are provided with a checklist, Spend Authorization instructions, an example Expense Report, and Powerpoint.

2. Applicant submits online application and emails budget breakdown before 7 week deadline
- SGA Advisor and GA review application. Any questions, clarifications, or revisions are emailed to the applicant.

↓ Pre-SGA Legislation ↓

3. Legislation drafted
- The Appropriations Committee Chair emails applicants with the date and time of the Appropriations Committee meeting and the Senate meeting where they will present their application.

4. Senate Meeting (Bill added to Agenda)
- At the Senate meeting the following Monday, the bill is referred to the Appropriations Committee. Applicant does *not* need to attend this Senate meeting.

↓ SGA Legislative Process ↓

5. Appropriations Committee Meeting (Tuesday at 4:45 pm - <u>Applicant must be present</u>)
- Applicant presents application to the committee and answers any questions they have. Committee may have recommendations for applicant regarding budget breakdown. If applicant needs to make to changes to budget, they may ask the Appropriations Committee to amend.

6. Senate Meeting (Monday at 5:00 pm - <u>Applicant must be present</u>)
- The bill is added to Unfinished Business.
- Applicant presents application at the Senate meeting and answers any questions senators have. Senate votes on bill.

7. After Senate vote
- If bill passes, GA sends "Next Steps" email with a list of the forms that need to be submitted and respective deadlines. This will include the [Off Campus Visitation form](), [Supplier Setup form](), [Substitute W-9 form](), [Safe Driver]() requirements, proof of Spend Authorization completion in Workday, and any necessary additional forms. In this same communication, grant recipient will be requested to schedule their post-travel Expense Report meeting to take place within five days of returning from travel.
- If bill fails, GA sends email notifying applicants of bill failure.

↓ Post Senate Meeting ↓

8. Signature and financial paperwork
- Signatures are obtained from: SGA VP, SGA President, SGA Advisor, Director of OSE and VP Student Affairs.
- Assistant Director sends all paperwork to the Budget Office after signatures are obtained.

9. Pre-Travel Paperwork submitted

- Please reference the "Next Steps" email regarding travel forms, paperwork, and deadlines. Any questions regarding this information should be directed to GA (sga@southeastern.edu).

↓ Post Travel↓

10. Post Travel Expense Account Meeting
- The grant recipient should bring the following to meeting:
  - Completed and signed Expense Report form
  - Conference Material (includes Name, location, and dates of conference)
  - Conference Report (1-2 pages typed) and 3 photos of conference
  - Itemized receipts showing paid in full
  - Bank and/or credit card statement(s) with corresponding transaction amounts. Name, date, transaction details, and amount must be visible. Other transactions may be redacted from statements.

11. Grant recipient's faculty advisor enters Expense Report into Workday.

12. GA submits paper Expense Report form to Travel Office. Faculty advisor should upload and attach all other required documents to Expense Report in Workday.