



## Facilities Operations Policy Statement OP-17 Travel Requests

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### (Step by Step Process for Facilities Management and Operations)

All Travel Packets will be compiled by the Facilities Business Office (at this time specifically by Sonia Perez and/or Jennah Bennett.)

\*This process must be initiated a minimum of 30 days prior to the date of travel.

#### **Step 1:**

- Email your immediate supervisor to obtain approval for any upcoming travel requests. (*Example: managers will email the director, supervisors will email managers & employees would email their supervisor.*) The subject line should be titled, "**Travel Request**." The body of the email should include the following information:
  - (a) The purpose of the travel (*name of training event and location*)
  - (b) Approximate timeframe (*dates of travel*)
  - (c) Estimate of approximate cost.

#### **Step 2:**

- Upon approval, your immediate supervisor should then **forward** the email request to the next level of management until it reaches the FM directors (in this case, Lee Snodgrass) to obtain the final level of approval for your upcoming travel request. The subject line should always be titled, "**Travel Request**" and the body of the email should always include the following information:
  - (a) The purpose of the travel (*name of training event and location*)
  - (b) Approximate timeframe (*dates of travel*)
  - (c) Estimate of approximate cost.

Once the director has approved the travel request, his approval and the details will be sent to FBO (Facilities Business Office). An assigned person from FBO (in this case Sonia Perez or Jennah Bennett) will contact you to set up an appointment at which time they will compile your travel packet.

#### **Step 3:**

- The following items/information (when applicable) must be provided when attending the appointment at FBO:
  - (a) Website or brochure with training registration information
  - (b) Hotel or accommodation options
  - (c) Flight time options (if applicable)
  - (d) Travel Advance (*should be used only when **absolutely necessary***)
  - (e) Employee 800 # and home address
  - (f) Training Request form (*signed by your supervisor*) is required

#### **Step 4:**

- Once the travel packet is complete, FBO will have the director's signature for final approval.

FBO will process and be responsible for the timely delivery of all Travel Requests to the UNCC Travel Dept. FBO will provide you with a copy of the travel packet for your records.

  
Lee Snodgrass  
Facilities Operations Director