

UCSF School of Medicine Travel Guidelines

Effective Date: April 17, 2025

PURPOSE

Considering significant financial uncertainty and anticipated funding cuts, the UCSF School of Medicine (SOM) is introducing temporary travel guidelines to help us thoughtfully manage financial resources. These guidelines are intended to encourage mindful spending, particularly around discretionary, University-funded travel, while continuing to support our mission areas in patient care, research, and education.

We aim to balance the need for fiscal responsibility with some measure of flexibility for units to manage their resources and make travel decisions that best retain and support their teams. This flexible approach asks all units to minimize or defer lower-priority travel expenditures while prioritizing travel that directly supports critical operations, strategic priorities, or the professional development of faculty, learners, and staff.

By focusing on essential travel and aligning spending with our core mission, we can preserve resources for our highest priorities and maintain the long-term strength of our programs and community.

SCOPE

These guidelines apply to all faculty, staff, residents, fellows, and students affiliated with SOM. They cover all forms of University business travel funded by institutional resources.

Travel that was planned and purchased and speaking appearances that were committed to prior to the effective date of these guidelines are allowed. Unit leadership is encouraged to carefully review those existing commitments to ensure appropriate oversight of spending.

Travel reimbursed directly by external organizations (e.g., professional societies, industry collaborators, foundations, other universities or health systems) to the traveler are not subject to these guidelines.

These guidelines do not prevent the use of personal funds to support non-essential travel.

GUIDELINES STATEMENT

University business travel may proceed if criteria for both purpose/activity and funding source are met and are approved in advance by the appropriate department chair/ORU director/chief administrative officer (CAO).

1. Essential Purpose/Activity

- All University and Department-funded travel must be directly related to high-priority clinical, research, or educational activities, and/or career advancement, defined as follows:

- Patient Care: Travel necessary for direct patient care activities authorized by UCSF that cannot reasonably be performed locally.
- Research, Innovation, and Dissemination of Knowledge: Travel necessary to:
 - Plan and conduct critical research activities (such as a distant or multi-site collaborations or trials).
 - Presentation of research, innovation, or scholarship (at in-person professional meetings or other Universities) that is important to the dissemination of medical knowledge, the career advancement of the employee, or the reputation of the University.
- Education and Training: Travel necessary for:
 - Training, accreditation, licensure, education, professional development, or compliance-related activities that are essential and cannot be deferred or conducted online.
 - Off-site rotations, experiences, or major professional meetings that are integral to UCSF training programs or required by educational accrediting or specialty certifying bodies.
- Service: Travel required to fulfill high-priority service obligations (such as professional boards or committees, study sections, or site visits) that are within a faculty member's professional scope of employment.

2. Funding Sources

- Travel funded from Department or University sources **must** meet the Purpose / Activity guidelines listed above to qualify for reimbursement.
- Employees may still use funds allocated for travel in their UCSF employment agreements, but travel reimbursed from those stipends should meet the high-priority purposes above. Similarly, philanthropic funds, grants, and contracts may be used to reimburse travel expenses that meet these guidelines.
- It is anticipated that travel specifically budgeted in grants, contracts, and philanthropic funds will meet the criteria for essential travel.

3. Pre-Approval Requirement

- All travel must be approved in advance by the appropriate Chair/Director/CAO (or their designees) to ultimately be reimbursed by the University.
- Requests for reimbursable travel must be accompanied by a brief description that explains the purpose of the travel, its reason for high-priority status, and funding source. The Dean's Office has developed [a SmartSheet form](#) to facilitate the approval process.
- Approved travel should be accomplished in the most cost-effective manner possible.
- Pre-approval does not confer final approval for travel expenses. A final expense report must be submitted after travel has been completed. All reimbursable travel expenses must comply with [UCSF's](#) and SOM's travel expense policies and guidelines.

4. Alternative Options

- Virtual attendance, teleconferencing, and remote collaboration tools should be considered as alternatives to travel whenever feasible.

COMPLIANCE AND ENFORCEMENT

- Chairs/Directors and CAOs are responsible for ensuring adherence with these guidelines
- Non-adherence may result in denial of reimbursement
- The SOM Dean's Office will regularly review travel requests and may modify or tighten restrictions based on financial status.

RESPONSIBILITIES

- **Chairs/Directors and CAOs:** Publicize travel guidelines in their units. Review and approve travel requests based on the criteria outlined in this policy. They may delegate approval authority to others within their units.
- **Employees and Learners:** Adhere to the travel guidelines, and seek approval for travel in advance of spending or committing University funds.
- **Departmental and ORU Finance Staff:** Monitor travel expenses and ensure compliance with financial management practices.
- **SOM Dean's Office Financial Affairs Unit:** Oversee the implementation and compliance of this policy and facilitate processing of expense reimbursement for travel pre-approved by units.

REVIEW AND SUNSET CLAUSE

- These guidelines will apply to travel decisions made through September 30, 2025 (including commitments to future travel after that date).
- In September 2025, the SOM Dean's Office will review the guidelines and may sunset, continue, or adjust them based on financial performance and institutional needs.