



Hall Director Professional Development Workbook

2021 Version

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Residential Life Mission Statement:

The Department of Residential Life provides convenient living spaces, intentional services, and actively engaged staff who strive to help all students build connections, get involved, and achieve success.

Welcome to Res Life at Minnesota State University, Mankato! We hope you find this workbook helpful during your time working in Residential Life here. We've created this workbook as our way of assisting you in your professional development so that you may leave here better prepared for your next job. While we are excited to have you here, we recognize that your time as a Hall Director at Minnesota State probably isn't your final destination, so we want to help you use this position as a launching pad for the rest of your career!

This workbook is filled with a lot of content- from places for you to record conferences you've attended and books you've read, to pages filled with goal setting opportunities and professional development topics. While we recognize that you won't be able to focus in on every professional development area listed throughout this workbook, we are hopeful that you will be able to discover what you are passionate about and grow in those areas over the next several years.

As you get to the back of this workbook, you'll find that in Appendix A, we have listed out several professional development topic areas. When we developed this workbook, we looked at the job descriptions for jobs that we considered "moving up" within several functional areas of higher education. By evaluating these positions, we found that many of them had several themes of what they were looking for in a candidate- those themes are now our professional development topic areas. While you won't be able to do everything listed in this workbook, it is our hope that in developing yourself in some of these areas, you will be better prepared to move up in your next role within higher education.

Use this workbook. Revisit it often. Set goals for yourself. Above all else, though, recognize that you are capable of doing so much here at Minnesota State- all you've got to do is ask.

How to Use this Workbook

According to Merriam-Webster's Dictionary, a “workbook” is defined in several ways: 1. a worker's manual, 2. a booklet outlining a course of study, 3. a record of work done, 4. a student's book of problems to be solved directly on pages. We hope you use the Hall Director Professional Development Workbook for exactly these reasons!

1. A worker's manual

This is your manual to professional development in the Minnesota and Midwest region. The workbook was developed several years ago with different post-Hall Director positions in mind. So, do not think these suggestions are just to get you to a mid-level Housing job. As with most manuals, you pick and choose what you need to learn. Your TV won't turn on? Well, you're not looking at the “How to Scan for Channels” section of your TV's manual! And just like fixing your TV, you don't need to do everything in this workbook to get professional development.

2. A booklet outlining a course of study.

The workbook is meant to guide you to pick your own path of professional development. If you are interested in Student Conduct, focus on Student Conduct related activities such as observing a contact termination case or attending Maxient's annual conference, Maxfest. You get to decide your “course of study” and what you are interested in!

3. A record of work done.

Once you have looked at your workbook and decided on your professional development plan, make sure to write down all you have done. The workbook intentionally does not include your job requirements, so you will need to keep a record of your “extra” activities for your resume, cover letters, future job interviews, etc. And just like you don't need to do every professional development activity in the workbook, you don't need to fill out every page, either. Choose your own method of tracking or ask another Hall Director how they have kept track of their professional development opportunities.

4. A student's book of problems to be solved directly on pages.

Many in Student Affairs consider themselves life-long learners, and we hope you do too! The Hall Director Professional Development Workbook can help you solve the age-old question of “What comes next?” Use the workbook to continue to learn and grow in your position, not only as a Hall Director, but also for whatever does come next.

Definitions

ACPA - American College Personnel Association

ACUHO-I - Association of College and University Housing Officers International

Attendance Framework - Residential Life Departmental framework for determining who can attend conferences when multiple individuals are interested.

Board of Directors - Group of individuals who have an impact on your experience.

Expense Report - Report submitted to be reimbursed for work-related costs.

Funding Request - Form to be submitted for payment of funds by Residential Life or other funding source.

Maxfest - Annual conference associated with conduct management program Maxient.

MCPA - Minnesota College Personnel Association

MSUAASF - Minnesota State University Association of Administrative and Service Faculty. MSUAASF is the name of our bargaining unit.

NACA - National Association of College Activities

NASPA - Student Affairs Administrators in Higher Education (formerly the National Association of Student Personnel Administrators)

PIF Funds - Personal Improvement Funds available to MSUAASF members

UMR-ACUHO - Upper Midwest Region of ACUHO-I

Professional Development - On Your Own

Most professional development will depend on your own motivation and interest areas. Some areas we think you may enjoy exploring include:

Social Media and Websites

Suggestions to get you started:

- Ted Talks @ www.ted.com
- UMR-ACUHO @ www.umn-acuho.org
- Inside Higher Ed @ www.insidehighered.com
- Student Affairs Professionals - FB Group
- Residential Life Professionals - FB Group

Suggestions others gave you:

Books and Publications

Suggestions to get you started:

Books

- Start with Why; Simon Sinek
- Drive; Daniel Pink
- Radical Candor; Kim Scott

Publications

- Perspectives
(Quarterly from UMR-ACUHO)
- Talking Stick
(Quarterly from ACUHO-I)

Suggestions others gave you:

Professional Reading Log

[illegible]

Date _____

Professional Development - Conferences

Attendance at conferences at the state, regional, and national level can fulfill many professional development goals.

Example Conferences

- **UMR-ACUHO Annual Conference** (www.umn-acuho.org; fall conference)
- **MCPA** (www.mcpa4you.org; fall conference)
- **Midwest Bisexual, Lesbian, Gay, Trans, Ally College Conference** (www.mblgtacc.org; fall conference)
- **St. Cloud Leadership Conference** (www.stcloudstate.edu/elhe/news; spring conference)
- **ACPA** (www.myacpa.org; spring conference)
- **NASPA** (www.naspa.org; spring conference)
- **NACA** (www.naca.org; spring conference)
- **Maxfest** (www.maxient.com; spring conference)
- **White Privilege Conference** (www.theprivilegeinstitute.com; spring conference)
- **ACUHO-I Annual Conference and Expo** (www.acuho-i.org; summer conference)
- **StarRez** (www.starrez.com; summer conference)

Conference Attendance Log

Conference Attended	Date
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Professional Presentations Log

Name/Subject	Date	Location

Professional Writing Log

Title/Subject	Date	Publication

Residential Life Presentations

Topic/Subject	Date	CA/Grad/ResEd

My Board of Directors

During Summer HD Orientation, Cindy Janney utilizes this page in an exercise she conducts with all new hires.

Contact:
Contact Information:
Role(s) they play for me:

Contact:
Contact Information:
Role(s) they play for me:

Contact:
Contact Information:
Role(s) they play for me:

Contact:
Contact Information:
Role(s) they play for me:

Contact:
Contact Information:
Role(s) they play for me:

Additional Professional Contacts

Name/Position	Institution	E-mail	Phone

Year ONE

Typical Skill Sets - Examples

Assessment

- Building wide assessment project (Spring)

Budgeting

- Make budget recommendation in community and on projects/committees

Clear Act/Title IX

- Attend a University presentation about Title IX policies/procedures

Communication Skills

- Submit a UMR Perspectives article for publication

Diversity Initiatives and Cultural Competency

- Apply to participate in the Social Justice Training Institute

Event Planning Management

- Plan and implement a program outside of your community development plan to benefit students

Graduate Student Supervision

- Propose Graduate Internship Opportunity (MNSU, ACUHO-I)

Mentorship

- Advise RL delegation to UNI RA conference

Planning/Conducting Trainings

- Help facilitate OPA training

Problem Solving/Critical Thinking

- Annually, when updates to the Student Guide are requested, create and submit a policy change proposal

Professional Presentation

- Present at Minnesota State Mankato Professional Development Day

Project Management

- Join ATCCHA and take a leadership role within your committee

Student Development Theories

- Re-read, review and identify theories used in practice

Technology

- Take a course/seminar offered by MNSU IT

University Wide Involvement

- In the Spring, apply to assist NSFP in summer academic advising

Additional examples can be found under the skill sets found in the Index.

Reflection Questions

What are you looking to accomplish in your first year?

What made you choose Mankato?

Are there areas that you do not have a lot of experience in?

Year ONE

Goal Summary	Start Date _____
Notes	Completion Date _____

Goal Summary	Start Date _____
Notes	Completion Date _____

Goal Summary	Start Date _____
Notes	Completion Date _____

Goal Summary	Start Date _____
Notes	Completion Date _____

Year TWO

Typical Skill Sets - Examples

Assessment <ul style="list-style-type: none"> • Submit a research grant proposal (AIM) to UMR 	Graduate Student Supervision <ul style="list-style-type: none"> • Intern Supervision (ACUHO-I, CSP, Ed Lead)
Budgeting <ul style="list-style-type: none"> • Res Life budget forecasting workshop 	Mentorship <ul style="list-style-type: none"> • Participate in RELI
Cleary Act/Title IX <ul style="list-style-type: none"> • Develop an awareness campaign in the Residence Halls 	Planning/Conducting Trainings <ul style="list-style-type: none"> • Present at Grad Training
Conduct Management <ul style="list-style-type: none"> • Adjudicate a detox and/or self-harm case in coordination with supervisor 	Problem Solving/Critical Thinking <ul style="list-style-type: none"> • Play integral role in managing move in process within own area
Crisis Management <ul style="list-style-type: none"> • Develop training material for Res Life staff responding to specific student behaviors (example: eating disorders) 	Professional Presentation <ul style="list-style-type: none"> • Present at a regional or national conference
Diversity Initiatives and Cultural Competency <ul style="list-style-type: none"> • Participate in the Greater Mankato Diversity Council's Write on Race 	Project Management <ul style="list-style-type: none"> • Attend/observe a RL facility planning meeting
Event Planning Management <ul style="list-style-type: none"> • Plan and implement a prolonged educational series 	Student Development Theories <ul style="list-style-type: none"> • Present on implementation of Student Development Theories
Facilities <ul style="list-style-type: none"> • Participate in a Res Life RFP process 	Technology <ul style="list-style-type: none"> • Assist in developing and implementing on-line CA training
	University Wide Involvement <ul style="list-style-type: none"> • Teach First Year Seminar

Reflection Questions

What did you learn last year that you want to improve on this year?

What are your passion areas?

What specific tasks do you want to accomplish?

Year TWO

Goal Summary	Start Date _____
Notes	Completion Date _____

Goal Summary	Start Date _____
Notes	Completion Date _____

Goal Summary	Start Date _____
Notes	Completion Date _____

Goal Summary	Start Date _____
Notes	Completion Date _____

Year THREE

Typical Skill Sets - Examples

Assessment

- Assist in organizing a Residential Education workshop on EBI (explanation, data analysis, priorities, etc.)

Clear Act/Title IX

- Present during CA/Res Ed Training with Leadership Team member

Conduct Management

- Meet with Student Success Coordinator to learn an introduction to the "Behind the scenes" set up of Maxient

Communication Skills

- Webinar presenter

Crisis Management

- Campus Emergency Response Training (NIMS)

Diversity Initiatives and Cultural Competency

- Participate in the city of Mankato Leadership Institute

Facilities

- Participate in the Stadium heights turn process

Graduate Student Supervision

- Co-chair Grad Recruitment Committee

Mentorship

- Participate in NHTI

Project Management

- Observe/assist in management of one summer conference group

Student Development Theories

- Be able to identify which theories you personally use in supervising CAs

Technology

- Attend Maxfest or StarRez annual conference

University Wide Involvement

- Co-chair RL search committee

Reflection Questions

What is your ideal next job?

What skills do you need to have to get that job?

Are there colleagues you can reach out to that can help you gain needed skills?

Year THREE

Goal Summary	Start Date _____
Notes	Completion Date _____

Goal Summary	Start Date _____
Notes	Completion Date _____

Goal Summary	Start Date _____
Notes	Completion Date _____

Goal Summary	Start Date _____
Notes	Completion Date _____

Year FOUR/FIVE

Typical Skill Sets - Examples

Assessment

- Assessment presentation at UMR

Conduct Management

- Adjudicate a contract term case in coordination with supervisor

Project Management

- Attend RL Project Management meetings for one semester

Reflection Questions

What is your ideal next job?

Looking at your resume are there "gaps" you need to fill in?

Are there any "Year 4/5" skills you specifically want to work on?

Have you begun to edit your resume?

What does talking about this plan look like to you?

Professional Planning: Year FIVE

What positions are you researching ? (Reviewing job descriptions)

How are you positioning yourself to have the skills necessary to qualify for the positions you are looking to apply for? (Skills assessment)

Which professionals can assess your qualifications and provide additional guidance? (Networking)

What other constraints do you have for a job search and career change (location, partner, type/size of institution, etc.)?

Year FOUR

Goal Summary	Start Date _____
Notes	Completion Date _____

Goal Summary	Start Date _____
Notes	Completion Date _____

Goal Summary	Start Date _____
Notes	Completion Date _____

Goal Summary	Start Date _____
Notes	Completion Date _____

Year FIVE

Goal Summary	Start Date _____
Notes	Completion Date _____

Goal Summary	Start Date _____
Notes	Completion Date _____

Goal Summary	Start Date _____
Notes	Completion Date _____

Goal Summary	Start Date _____
Notes	Completion Date _____

ADDITIONAL GOALS

Goal Summary	Start Date _____
Notes	Completion Date _____

Goal Summary	Start Date _____
Notes	Completion Date _____

Goal Summary	Start Date _____
Notes	Completion Date _____

Goal Summary	Start Date _____
Notes	Completion Date _____

ADDITIONAL GOALS

Goal Summary	Start Date _____
Notes	Completion Date _____

Goal Summary	Start Date _____
Notes	Completion Date _____

Goal Summary	Start Date _____
Notes	Completion Date _____

Goal Summary	Start Date _____
Notes	Completion Date _____

Notes

Notes

Notes

Notes

Appendix A: Professional Development Topic Areas

Assessment

- EBI Assessment - *Year 1*
- Student Staff Assessment - *Year 1*
- Building wide assessment project (Spring) - *Year 1*
- Assessment workshop with Institutional Planning, Research and Development (Set up by Associate Director) - *Year 1*
- Complete an Individual Assessment Project for area or department - *Year 2*
- Submit a research grant proposal (AIM) to UMR - *Year 2/3/4*
 - Explore in Year 2, Submit in Year 3, Conduct research in Year 4
- Assist in organizing a Residential Education workshop on EBI (explanations, data analysis, priorities, etc.) - *Year 3*
- Assessment presentation at UMR (AIM Grant) - *Year 4*

Budgeting

- Make budget recommendations in community and on projects/committees - *Year 1*
- Associate Director coordinates workshop to learn about the budget forecasting process in RL - *Year 2*

Cleary Act/Title IX

- Attend a University presentation about Title IX policies - *Year 1*
- Be a contributing member to Sexual Violence Program Implementation on campus - *Year 1*
- Develop an awareness campaign in the Residence Halls - *Year 2*
- Create a workshop to be used with non-Res Life student organizations - *Year 2*
- Attend Minnesota Campus Sexual Violence Prevention Summit - *Year 2*
- Present during CA/Res Ed Training with Leadership Team member - *Year 3*
- Meet with University Security to learn an introduction into our campus Clery Act reporting process - *Year 3*

Appendix A: Professional Development Topic Areas

Conduct Management

- Adjudicate a detox and/or self-harm case in coordination with supervisor - Year 2
- Represent MSUAASF on conduct board - Year 2
- Observe a conduct appeal hearing and process with adjudicator - Year 2
- Observe a contract termination hearing and process with adjudicator - Year 2
- Meet with Student Success Coordinator to learn an introduction to the "behind the scenes" set up of Maxient- Year 3
- Adjudicate a contract term case in coordination with supervisor - Year 4/5
- Observe a contract termination appeal hearing and process with Director - Year 4/5

Communication Skills

- Submit a UMR Perspectives article for publication - Year 1
- Attend a professional conference/workshop that has "communication skills" as a focus - Year 1
- Present at a Res Ed Meeting - Year 1
- Webinar presenter - Year 3

Crisis Management

- Develop training material for Res Life staff responding to specific student behaviors (example: eating disorders) - Year 2
- Develop expertise in an area of crisis and present on it - Year 2
- Participate in a Mankato area emergency exercise - Year 3
- Campus Emergency Response Training (NIMS) - Year 3
- Attend a crisis focus conference/workshop - Year 3

Appendix A: Professional Development Topic Areas

Diversity Initiatives and Cultural Competency

- Review EBI Data regarding marginalized student groups, work on a programmatic approach - *Year 1*
- Apply to participate in the Social Justice Training Institute - *Year 1*
- Read books/participate in a book club about marginalized students - *Year 1*
- Partner with University office to present on a diversity topic (floor presidents, community members, CAs, etc.) - *Year 1*
- Participate in the city of Mankato Tapestry project - *Year 2*
- Participate in the Greater Mankato Diversity Council's Write on Race - *Year 2*
- Create and implement an intentional visibility plan prioritizing under-represented students - *Year 2*
- Participate in the city of Mankato Leadership Institute - *Year 3*

Event Planning/Management

- Plan and implement a program outside of your community development plan to benefit students - *Year 1*
- Plan a campus wide event or welcome week initiative - *Year 1*
- Represent RL on Homecoming, Family Weekend, or Welcome Week - *Year 1*
- Plan and implement a prolonged educational series - *Year 2*
- Co-programming with a RSO - *Year 2*

Facilities

- Ask the Associate Director to coordinate a workshop on the public/private partnership between Stadium Heights Property Owners and Residential Life - *Year 2*
- Participate in a RL RFP process - *Year 2*
- Co-manage the damage appeals process with an Assistant Director of Residential Education- *Year 3*
- Participate in the SH turn process - *Year 3*

Appendix A: Professional Development Topic Areas

Graduate Student Supervision

- Propose Graduate Internship Opportunity (MNU, ACUHO-I) - Year 1
- Supervise SSC - Year 1-2
- Intern Supervision (ACUHO-I, CSP, Ed Lead) - Year 2
- Co-chair Grad Recruitment Committee - Year 3
- Work with Student Success Coordinator to provide training/supervision to a grad in the conduct hearing role. - Year 3

Mentorship

- Advise RL delegation to UNI RA conference - Year 1
- Provide mock interview for budding SA professional - Year 1
- ATCCHA student mentorship opportunity - Year 2
- Participate in RELI - Year 2/3
- Participate in NHTI - Year 3/4/5

Planning/Conducting Training

- Help facilitate OPA training - Year 1
- Present at grad training - Year 2
- Create an educational workshop during the academic year for CAs, Grads, and/or Res Ed - Year 2

Problem Solving/Critical Thinking

- Annually, when updates to the Student Guide are requested, create and submit a policy change proposal - Year 1
- Enroll in coursework/certificate programs for continuing education - Year 1
- Play integral role in managing move in process within own area - Year 2

Appendix A: Professional Development Topic Areas

Professional Presentation Experience

- Present at Professional Development Day - Year 1
- Present at RHA Student Leadership conference - Year 1
- Represent RL and summer Orientation Resource Fair - Year 1
- Present at a state level conference (St. Cloud Leadership Institute, MSU professional development day, ATCCHA, etc.) - Year 1
- Present at a regional or national conference (UMR, ACUHO-I) - Year 2

Project Management

- Identify a need and propose a pilot project in community - Year 1
- Join a UMR committee - Year 1
- Join ATCCHA and take a leadership role within your committee - Year 1
- Participate in a RL RFP process - Year 2
- Attend/observe a RL facility planning meeting - Year 2
- Present on pilot project and propose department plan - Year 2
- Chair/Co Chair Res Ed Committee (academic year or summer) - Year 2
- Apply to chair a UMR committee - Year 3/4/5
- Observe/assist in management of one summer conference group - Year 3
- Attend RL Project Management meetings for one semester - Year 4/5

Student Development Theories

- Re-read, review and identify theories used in practice - Year 1
- Present on implementation of Student Development Theories at Res Ed, MNSU Professional Development Day, and/or any conference - Year 2
- Be able to identify which theories you personally use in supervising CAs - Year 3

Appendix A: Professional Development Topic Areas

Technology

- Take a course/seminar offered by MNSU IT - Year 1
- Assist in developing and implementing on-line CA training - Year 2
- Teach members of RL how technology platforms (Maverick Involvement Team Events System, StarRez, IT, etc.) can be utilized in RL work - Year 2
- Attend Maxfest or StarRez annual conference - Year 3
- Take a course/seminar on web-site development - Year 3

University Wide Involvement

- Apply to be on a MSUAASF committee - Year 1
- RL search committee member - Year 1
- In the spring, apply to assist NSFP in summer academic advising - Year 1
- Volunteer to assist with Homecoming - Year 1
- In Spring, apply to teach First Year Seminar for the following Fall Semester - Year 1
- Advise a student organization - Year 1
- Participate in the MSU Leadership Institute - Year 1
- Co-chair RL search committee - Year 3
- Take a course/seminar on web-site development - Year 3

Appendix B: Professional Development Resources

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Staffing Standard and Professional Development Attendance Framework

Department of Residential Life
Residential Education Team

Throughout the academic year members of the residential education professional staff team will want take time off or want to participate in professional development opportunities away from the Mankato community. Approval to given our commitment to the immediate experience of students living on campus our staffing standards mean that each individual may not be approved time off or be able to annually attend the professional opportunity of their choice.

Staffing standard:

Having half-staff of professional staff members (Hall Director and/or Area Director) available per area (West/East) not out of office during fall and spring semesters when classes are in session; having at least one on call staff (Area Directors and Associate Director) not out of office during fall and spring semesters when classes are in session. Any exception to this must be approved by the Associate Director. Exceptions will never be approved in situations that would result in less than three on duty/on call staff members in the office. When you are out of the office you need to work to identify another Res Ed to cover your staff and students. Who is covering your area of responsibilities should be shared with the Res Ed team and central office.

Professional Development Attendance Framework:

During the academic year, the following criteria will be utilized in circumstances when the number of individuals wanting to participate would not be consistent with our business day area staffing standard.

Priority #1: Serve in an elected position*

Priority #2: Committee member*

Priority #3: Presenting*

Priority #4: Did not attend opportunity the previous academic year

*Prior to applying for a committee or submitting a proposal to present, one needs to establish eligibility to attend the professional development by getting approval from their supervisor and utilizing the established priorities.

During the summer months the staffing standard are significantly reduced (need one person "on call" and one person "on duty") increasing the opportunity for individuals to participate in the same professional development opportunity. "On-call" and "on-duty" coverage is maintained during the summer months. The above priorities will be considered if each "on-call" or "on-duty" individual wants to attend the same professional development opportunity.

9/10/19

Using Professional Development Funds

- A “pool” of PDF monies, which is shared among all ASF Bargaining Unit Faculty, is received each Fiscal Year (FY), according to our MSUAASF collective bargaining agreement.
- Allowable specific uses of your PDF are outlined in Article 15, Section A of the current Minn State University System/MSUAASF collective bargaining agreement. The purchases of technology, including hardware, that satisfy the standards of this subdivision are permissible. Professional development funds may not be used to purchase equipment that is necessary to meet the ASF Bargaining Unit Faculty's position requirements. All assets purchased with professional development funds are the property of the university.
- The total PDF amount is divided equally among our ASF Bargaining Unit Faculty. The member allocation for the fiscal year ending 6/30/2021 (FY21) is \$841 per position. The exact amount varies from year to year and is based on how many positions are either filled, or in the process of being searched/vacant when the allocation is made.
- When you get to the point of wanting to use your funds, fill out the funding request form and submit to your supervisor for approval.
- The overall MSUAASF PDF allocation to our campus has the same MSU cost center for everyone, account #213030 (Account number used on Expense Reports when using PDF)
- Your own personal PDF account balance is identified within the overall #213030 cost center by name. You can view balance and transaction records at the following website (names listed alphabetically): <https://admin.mnsu.edu/finance-and-administration/departments/business-services/university-travel/msuaasf-travel-by-employee-reports/>
- Funds can carry over from one FY to the next, but balances in excess of \$2,000 require a written utilization plan. The plan should be sent to the MSUAASF Treasurer by the end of that fiscal year (June 30). Without a plan, the balance is reduced to \$1,500 and no new allocation is given.
- You are encouraged to keep track of your own account balance as you spend it and the process for using any of the funds to reimburse expenses (as allowable per Article 15, Section A of the current MnSCU/MSUAASF collective bargaining agreement). The reimbursement process is the same as for any other reimbursements (except that it is a special Cost Center). Overspending is not allowed and you will be required to pay back the amount you overspend. ASF Bargaining Unit Faculty who have not resolved any deficit prior to the next distribution will not receive an allocation in that cycle.
- When members leave MSU, they have the opportunity to bequest/give/will their remaining PDF funds to other ASF Bargaining Unit Faculty. If you would like to request that your monies be given to another member(s), an email needs to be sent to the MSUAASF campus treasurer prior to 4:00pm on your last date of employment.

MSUAASF

effective January 1, 2021

MSUAASF (#211)

State-owned vehicle not available	56 cents per mile
State-owned vehicle declined or not requested	49 cents per mile
Tolls and parking fees	actual cost
Commercial transportation (air, taxi, rental car, etc.) + reasonable gratuities	actual cost (baggage fees reimbursable, tips not reimbursable)
Specially equipped personal van - provides wheelchair access	66.5 cents per mile
Motorcycle	no reimbursement applicable
Personal aircraft	\$1.27 dollars per mile
Overnight lodging	actual cost (reasonable)
Laundry and/or dry-cleaning after 1 week in continuous travel status	actual cost not to exceed \$16 per week
Work-related long distance calls	no reimbursement applicable
Personal telephone calls	no reimbursement applicable
Special expenses (e.g., conference fees, banquet tickets)	actual cost with prior approval
Meals + reasonable gratuities	Actual cost up to maximums
I breakfast (in travel status overnight or leave home before 6 am)	Breakfast - \$9.00 Lunch - \$11.00 (must be away from home overnight)
I lunch (in travel status and more than 35 miles from regular work station)	Dinner - \$16.00
I dinner (in travel status overnight or return home after 7:00 pm)	<u>Other metro areas:*</u> Breakfast - \$11.00 Lunch - \$13.00 (must be away from home overnight) Dinner - \$20.00 2 or more consecutive meals reimbursed up to the combined maximum
Payment of expenses	Advances if expenses exceed \$50.



MINNESOTA STATE UNIVERSITY MANKATO

REQUEST FOR APPROVAL OF OUT-OF-STATE TRAVEL

Check applicable: Out-of-State Travel ☒ International Travel ☐ Travel Advance Request ☐

If possible, requests should be processed at least two weeks before travel dates.

your decision

SECTION I. EMPLOYEE & TRIP INFORMATION

Name _____ Department Residential Life
 Last First
 Employee ID _____ Bargaining Unit 211 Mail Code 111 CC
 (Found on Payroll Stub)
 Describe in detail the reason for travel Attach a copy of the event agenda or brochure.
 Location of Event _____
 Date(s) of Event _____ Departure Date _____ Return Date _____

SECTION II. ESTIMATED EXPENSES AND/OR ADVANCE REQUEST

	Estimated Costs	Advance Amount (Complete only if requesting an advance)	Justification
Airfare	\$ _____	\$ _____	*Car Rental Car rental by employees or any other individuals authorized to travel including students is authorized only when the type of trip or location of meetings is such that the use of local transportation (taxis, airport limousines and airport shuttles, buses) is not practical or is expected to be more expensive.
Registration	\$ _____	\$ _____	
Lodging	\$ _____	\$ _____	
State Car	\$ _____	\$ _____	
Car Rental* (Use contract vendor Enterprise or National when possible)	\$ _____	\$ _____	
Conference Meal (Over maximum meal allowance)	\$ _____	\$ _____	**Other
Meals (# of days _____ x daily meal rate _____ = \$ _____)	\$ _____	\$ _____	
Other** Specify - _____	\$ _____	\$ _____	
Total estimated costs	\$ _____		
Total advance requested		\$ _____	
Date check needed		____/____/____	Payment Method (Check all that apply) CAO35# _____ PO# _____ Purchasing Card _____ Employee Expense Report _____

Travel advances are issued on the payroll cycle and cannot be issued earlier than one pay period before travel dates except for prepaid expenses such as airfare and registration. If applicable, please provide paid receipts. Any negative or positive differences between actual expenses and advance amount will be settled through the payroll system.

SECTION III. FUNDING SOURCES AND AUTHORIZATIONS

#1 → Professional Development/Contract Travel Funds Cost Center # 213030 \$ _____
 #2 → Department Operating Funds Cost Center # 302810 \$ _____
 #1 → Other Sources 1 Cost Center # 216004 \$ _____
 (faculty improvement grants, professional improvement funds, research grants, foundation, activity, etc.)

Employee Signature _____ Date ____/____/____ Phone _____
 Dept. Chair/Unit Director/Supv. superior signature if #1, Assoc. Dir. if #2 Date ____/____/____ Phone _____
 College/Division Head _____ Date ____/____/____ Phone _____
 Vice President _____ Date ____/____/____ Phone _____
 President _____ Date ____/____/____ Phone _____

Distribution: Upon completion of approval, return the original form to requestor.

If advance is requested, forward to Business Services; otherwise, retain and submit copy with each payment request.

A member of the Minnesota State Colleges and Universities System, Minnesota State University, Mankato is an Affirmative Action/Equal Opportunity University. This document is available in alternative formats to individuals with disabilities by calling Business Services at 507-389-5069 (V), 800-627-3529 or 711 (MRS/TTY).

9/18/2014

Use this for MSU credit card purchases for professional development



Residential Life Funding Request Form

Name on Card _____ Date Submitted: insert date
Dept. Line/Floor Prof. Development Funds OR PIF Funds OR RL Funds Cost Center either 302810 OR 213030
Amount Charged: _____ Goods/Services: _____
Person authorized to purchase: _____
Phone #: _____ Location/Date of event: _____
Vendor: _____

Authorizing Signatures

Floor Funds

Hall Director

Community Advisor

Programming

Area Director/RHA Advisor/ Central Staff Member

Other
<u>your signature if</u>
<u>your funds. Associate</u>

Central Staff Member
<u>Director signature if</u>
<u>Dept. Funds</u>

*Purchasing Gift Cards is not allowed.

Floor Cards/Leadership Cards:

The individual authorized to make a purchase needs to bring this completed funding request form to the Residential Life Office located in the LRC (CC002).

Return the **credit card, sales receipt**, and the **funding request form** within 48 hours to the Residential Life Office (CC002).

Credit Card Agreement

I understand that I can only use the credit card to make the above approved purchases. I further understand that if I do not return the credit card within **48 hours of being issued, I will be charged \$25**. Finally, I understand that I will be held financially liable by Residential Life for making any unauthorized purchases or for purchases made without returning a receipt to Residential Life. Credit Cards are available during office hours Monday - Friday between 8:00 A.M. - 4:30 P.M.

Signature of Authorized Purchaser: _____ Date: _____

EMPLOYEE EXPENSE REPORT

#

declares under the penalties of perjury that this claim is just and correct, and that no part of it has been paid except with respect to those advance amounts shown, I AUTHORIZE PAYROLL DEDUCTION OF ANY SUCH ADVANCES.

State employees and other officials using state funds travelling on state business and using commercial airlines cannot claim frequent flyer mileage as their own. Employees must certify that they have not claimed frequent flyer mileage for personal use when they apply for travel reimbursement. *Any benefits received belong to the state.*

Approved: Based on knowledge of the necessity for travel and expense and on the basis of compliance with all provisions of applicable travel regulations.

dept. funds.

August 2009 *Business Services – Original with Signatures* *Department – Photocopy*
This form available online at: www.mnso.edu/busoff/forms

This form available online at: www.mnsu.edu/busoff/forms

_____ (Check all that apply)

Less Advance	50.00
Advance / Reimbursement Settlement	431.21

Minimum
Advance Amount
is

MINNESOTA STATE, MANKATO **GUIDELINES FOR THE ADMINISTRATIVE AND SERVICE FACULTY** **IMPROVEMENT FUND**

PURPOSE

Grants will be awarded for the following purposes:

1. Formal course work (credit or non-credit) to improve professional competence or complete a degree.
2. Tuition and registration fees for workshops, conferences, or short courses, related travel, instructional materials, and subsistence.
3. Observation for the improvement of work performance. Travel to other institutions for short periods to explore a process or equipment that might improve the performance of the person requesting the grant.
4. On-campus study related to improvement of professional competence. This will generally be a partial reduction of workload.

In all cases where the recipient of the grant will be absent from assigned duties, satisfactory arrangements for the performance of the duties shall be made with the immediate supervisor.

APPLICATION PROCEDURES

Application deadlines are:

- *June 1 for the period July 1 to September 30;*
 - *September 1 for the period October 1 to December 31;*
 - *December 1 for the period January 1 to March 31; and*
 - *March 1 for the period April 1 to June 30.*
1. Access the PIF Application Form may be found on the Forms page of the Human Resource website. Return completed signed application form by the end of the business day to Human Resources WA 336 in accordance with the above deadline dates. If the due date falls on a weekend, you may still turn in your PIF Application by the end of the next business day following the due date. Late applications will not be accepted.
 2. If you receive a PIF award, the Director of Human Resources will send you a PIF Agreement Form to sign and return to Human Resources WA 336.

Notification and Implementation

3. All persons receiving a grant for any amount will be obligated to be on staff at Minnesota State Mankato THROUGH the FULL grant period following their award. If a person does not return to Minnesota State, the grant must be repaid in full. Persons anticipating retirement, resignation, or non-renewal from Minnesota State are ineligible for a grant in their final grant period.
4. If you are notified that you have received an award, follow the policy and procedures as applies to all regular travel expenses (in-state and out-state). The appropriate forms should then be submitted to the Director of Human Resources prior to your grant activities. PIF awards are for grant dollars. Receipt of a PIF award does not constitute approval of in or out of state travel. PIF award recipients must still follow necessary procedure for approval of travel.

Upon Your Return

5. Subsequent to your grant activities, Employee Expense Report (including receipts) must be completed and signed by supervisor, if required. Completed forms are then submitted to the Human Resources Office (WA 336) and will be sent to your Vice President for signing. (The Vice President will not sign off on expense forms until the PIF Follow-up Form has been received.) The Vice President's Office will then forward your expense reimbursement documents to the Office of Business Services.
6. Within 10 days of returning (when you submit your Employee Expense Report), each person receiving a grant must submit a PIF Follow-up Form (the Human Resources Office will send you this form if you receive a PIF Award) to the appropriate Vice President AND to the Director of Human Resources (the President's designee for the Administration of Professional Improvement Funds).

The Follow-up Form will be available for review by the PIF Review Committee.

AWARD SELECTION

1. Grants will be awarded in amounts up to a maximum of \$650 per person applying. If the money for the PIF requested by qualified applicants exceeds the funds available, the PIF Sub Meet & Confer may reduce the maximum award in \$50 increments down to a maximum of \$450 a person in order to provide funds for greater participation.

PRIORITY OF FUND ALLOCATION WILL BE AS FOLLOWS:

- a. Probationary, Permanent, or Externally Funded employee ON PAYROLL prior to July 1 of the current fiscal year, who has never received any funding.
- b. Probationary, Permanent, or Externally Funded employee ON PAYROLL prior to July 1 of the current fiscal year, who has not received funding in the current fiscal year nor prior fiscal year.
- c. Probationary, Permanent, or Externally Funded employee ON PAYROLL prior to July 1 of current fiscal year, who has not received funding in the current fiscal year but did receive funding in the prior fiscal year(s).
- d. Probationary, Permanent, or Externally Funded employee ON PAYROLL who has not received funding in current fiscal year.
- e. Probationary, Permanent, or Externally Funded employee ON PAYROLL who received funding in the current fiscal year.
- f. Fixed Term employee.

If the total number of qualified applicants received does not exhaust the available funds in the final grant period of the fiscal year, the grant money is just carried forward to the next fiscal year.



APPLICATION FOR PROFESSIONAL IMPROVEMENT FUND (PIF)

Clear Form

Receipt of a PIF award does not constitute approval of in or out of state travel. PIF award recipients must still follow necessary procedure for approval of travel.

EMPLOYEE INFORMATION

All applicable fields must be completed in full or your application will be returned.

Name	Phone	Mail Code	Date
Department	Years of Service at MSU	Highest Degree Held	
	(include this year)		
Have you ever received an Improvement Grant before? <input type="checkbox"/> Yes (Complete a, b, & c) <input type="checkbox"/> No (Continue to Grant Request Information)			
a. If "yes", when? ____/____/____ b. How much? \$ _____ c. What was the purpose of previous improvement grant? 			

GRANT REQUEST INFORMATION

1. Period for which grant is requested:	
<input type="checkbox"/> July 1 - September 30 (<i>June 1 deadline</i>) <input type="checkbox"/> October 1 - December 31 (<i>September 1 deadline</i>)	<input type="checkbox"/> January 1 - March 31 (<i>December 1 deadline</i>) <input type="checkbox"/> April 1 - June 30 (<i>March 1 deadline</i>)
If the due date falls on a weekend, you may still turn in your PIF application by the end of the next business day following the due date. Late applications will not be considered.	
2. Purpose of Grant (Select & Complete):	
<input type="checkbox"/>	Formal Coursework Related to Professional Competence. Describe: Is this to complete a degree? <input type="checkbox"/> Yes <input type="checkbox"/> No If "yes", what degree? _____ At what institution? _____ Have you been accepted for candidacy for this degree? <input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/>	Workshop, Conference, or Short Course (<i>Complete below and attach a copy of conference or workshop brochure</i>) Name/Description: Date(s): _____ Location: _____
<input type="checkbox"/>	Observation Grant Date(s): _____ Location: _____ Purpose of observation:
<input type="checkbox"/>	On-Campus Study Describe:
<input type="checkbox"/>	Other (e.g., develop in-service workshop, research and write article, develop videotape, etc.) Describe:
3. How does this activity relate to your goals and objectives for the year?	
Explain:	

Explain:

a. If "Yes", what is the dollar amount?

b. What are your commitments and obligations under it?

	Quantity	Amount	Total
State/Personal Vehicle	Miles	\$	\$0.00
Total Air/Bus Fare	-----	\$	\$0.00
Total Meal Cost	-----	\$	\$0.00
Lodging	Nights	\$	\$0.00
Registration Fee	-----	\$	\$0.00
Other Expenses (explain at right)	-----	\$	\$0.00
TOTAL:			\$0.00

b. Explain Other Expenses:

c. Equipment and Supplies:

	Amount
PIF request (\$650 Max/award period)	\$
Campus Allocation (\$)	\$
Out-of-Pocket	\$
Total Funds: (Should match "TOTAL" above)	\$

Minimum Amount: \$_____

(If funds are inadequate to cover the PIF requests of all eligible applicants, the available funds may be distributed at less than the \$650 maximum and/or the PIF support requested by each applicant. If this situation arises, it is helpful to list the minimum amount of money needed for you to undertake this activity.)