

Procedures for Requests to Attend a Conference/Seminar Paid by School Funds

Reason for these Procedures

As part of an effort to ensure that opportunities for staff development are available and equitable across the grants and finance organization, the Harvard Chan School has established this procedure to review and approve staff requests to attend conferences or seminars paid for by school funds. Staff attending conferences or seminars will be required to share what they have learned with their colleagues.

The goal of these procedures is to ensure fairness and equity when reviewing and approving staff requests to attend conferences or seminars.

Procedure Summary

Staff will complete and submit the [Conference/Seminar Request Form](#) which includes their manager's approval. Forms will be reviewed based on the criteria outlined below. Requests do not need to be submitted for Center for Workplace Development (CWD) courses.

- Requests requiring overnight stays should be submitted 90 days in advance of the conference/seminar registration deadline (or before the conference if there is no deadline)
- Requests not involving overnight travel should be submitted 45 days in advance of the conference/seminar

Review Criteria

All requests will be evaluated on their overall merit along with the following criteria:

- The requestor must be employed with the Harvard Chan School for a minimum of 6 months.
- The requestor must be in good standing.
- The availability of funds.
- Additional considerations
 - Type of attendance (i.e. is the requester presenting or attending?)
 - Number of conferences/seminars a person has attended in the past 3 years
 - Number of individuals requesting to attend the same conference or seminar

Related Documents

[Conference/Seminar Request Form](#)

Approvers:

OFS: [Dave Waxman](#)

SPA: [Frank Urso](#)

Questions? Contact:

[Eileen Nielsen](#)

- Content of the conference or seminar (generalized vs. specific, available within Harvard or locally)

Business Process Steps

Step	Role	Task/Activity
1	Requestor	Discusses with their manager to get their approval to attend the conference or seminar.
2	Requestor	<p>Completes all sections of the request form and submits to the Administrative Coordinator and approvers. (The manager's approval is uploaded within the request.) Time for review and approval needs to be factored in when submitting requests.</p> <p>The requestor receives an automatic response which includes a copy of the request.</p>
3	Administrative Coordinator	Brings request to the attention of approvers.
4	Approver(s)	Reviews request based on merit and criteria above and confers with OFS to ensure budget dollars are available. Finalizes decision and communicates to Administrative Coordinator.
5	Administrative Coordinator	<p>Responds to requestor and their manager and records response in jotform database.</p> <p><i>Note that appeals or questions should be directed to the approvers listed on page 1.</i></p>

Revision history

- Last updated November 25, 2019