

School of Labor and Employment Relations

Policy and Procedures Manual

Version 1.2 2/16/15

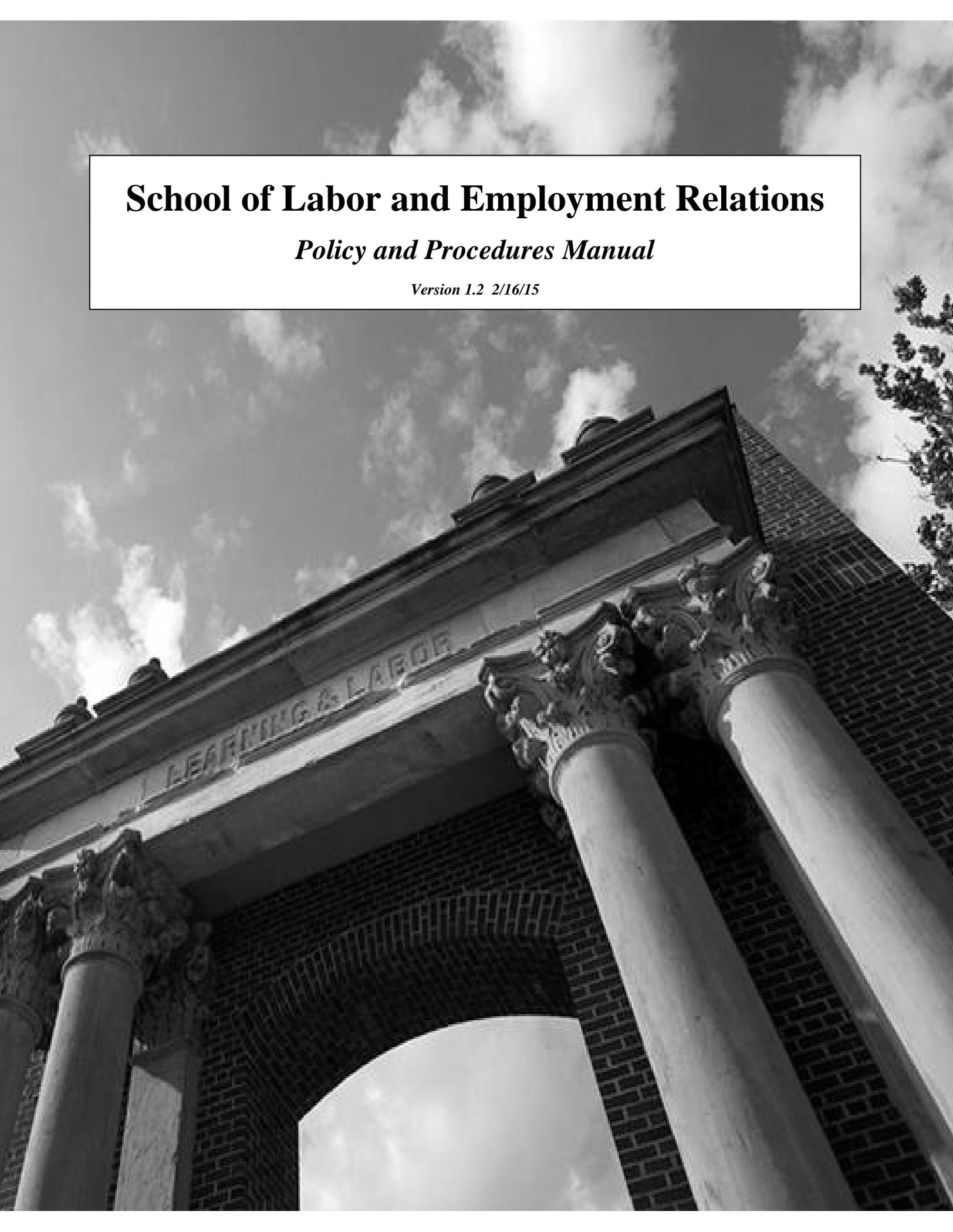


TABLE OF CONTENTS

1. BUILDING SECURITY..... 3

2. BUSINESS MEALS..... 3

3. CONFERENCE TRAVEL..... 3

4. COPIER..... 4

5. DIVERSITY STATEMENT..... 4

6. EQUIPMENT INVENTORY..... 4

7. ETHICS TRAINING..... 5

8. FEDERAL LOBBY DISCLOSURE ACT..... 5

9. FLEX TIME POLICY..... 5

10. FOREIGN NATIONALS, PAYEMENTS TO..... 5

11. GIFTS TO EMPLOYEES..... 5

12. GIFTS AND PRIZES TO NON-EMPLOYEES..... 6

13. GRANTS..... 6

14. HIRING STUDENTS..... 6

15. PARKING SPACE..... 7

16. ROOM RESERVATIONS..... 7

17. SERVICE CONTRACT REQUIREMENT..... 7

18. SPONSORING EVENTS..... 8

19. SYLLABUS UPDATES..... 8

20. TRAVEL..... 8

21. VISITING SCHOLARS..... 11

22. WEB UPDATES..... 11

1. BUILDING SECURITY

Please take every measure to ensure building safety. Avoid leaving offices unlocked while unattended and lock small and valuable equipment in cabinets and drawers when not in use. If you are working after hours when the building is locked do not give access to individuals without keys unless you know they belong in the building. Report any suspicious behavior to the police by dialing 9-911 from any campus phone.

Keys for the building are issued by Andy Janes (tjanes@illinois.edu) in 147 LER (3-2021). Periodically you will be asked to update our list of keys checked out to you.

It is important that you keep track of all keys issued to you. Whenever keys are lost the affected rooms must be rekeyed resulting in a substantial cost for the School. Individuals will be charged \$50.00 for lost keys to cover replacement and rekeying costs.

2. BUSINESS MEALS:

Business meals are defined as meals taken with students, donors, colleagues, or individuals from companies during which specific University business discussions take place.

Types:

Employee Business Meals - A meal during a business meeting attended by employees only, when the meeting is held during breakfast, lunch, or dinner if the timing of the meeting is crucial and all participants are available only at that time.

Recruitment - Meals or refreshments provided during meetings with non-employees or potential students, related to their possible employment at or admission to the University.

Business Meetings - University business discussions held between one or more University employees AND one or more visitors from an outside entity.

Hospitality Events - An event honoring distinguished guests who are not University employees. May include meals or receptions for faculty from other universities, members of external organizations, and/or visiting dignitaries. Dignitaries typically visit at the invitation of the University to participate in seminars, speaking engagements, and related events.

Donor Event - A meal and/or reception during which University employees meet with current or potential donors.

Funds:

Sponsored project funds may only be used for business meals when that use complies with the terms of the sponsored grant or contract and the related budget.

Expenditures using self-supporting funds must be directly related to generation of the fund's revenue.

Expenditures using gift or endowment income funds must be in compliance with donor intent restrictions.

Meal receipts must contain:

- The vendors' name.

- The date and time the receipt was printed/food ordered.
- **An itemized detail** of what was ordered and the quantity. Do not submit just the summary credit card receipt that you have signed.
- Other required information: names of attendees (non-LER personnel should also include their organization) and purpose of business meal.
- The purchase of alcohol is discouraged, however, alcohol may be purchased without previous approval for events attended by employees AND guests. If alcohol is purchased it needs to be put on a separate itemized receipt. Alcohol can only be paid off gift or self-supporting funds.

Non-Travel Business Meals, per person maximum

Breakfast:	\$25
Lunch:	\$25-\$40
Dinner:	\$40-\$60

Additional information can be found at:

<https://www.obfs.uillinois.edu/bfpp/section-8-payments-reimbursements/determine-allowability-business-meals-refreshments>

3. CONFERENCE TRAVEL

For tenure track and tenured faculty, the School will support two trips per academic year to conferences in which the faculty member is on the conference program; one of which can be an international conference. Travel support for other members of the faculty and staff is addressed on a case-by-case basis. All conference travel must be pre-approved by the Dean or his delegate (need to complete Travel Approval form and estimate). Faculty must apply for Scholar's Travel support from campus if eligible (<http://research.illinois.edu/stf/>); otherwise the unclaimed/lost subsidy will be charged to the faculty's research fund. If you have a joint appointment, support will be consistent with the percentage of your LER appointment. Also see #20) Travel policy regarding the pre-approval requirement for travel to conferences. Major conferences: ASSA January, UALE March, SIOP April, LERA June, AOM August, ASA October

For **conference hotel** reimbursements, the official university policy requires:

"A copy of the official conference brochure, registration form, or other documentation of the conference, showing information about designated conference hotels and your participation, which must be included with receipts when submitting a request for travel reimbursement.

2/23/15 rev.

4. COPIER

There is a photocopier in room 232 for faculty, staff and PhD student usage. Please see Erica Henry (ejhenry@illinois.edu) in 147 LER, 3-1482 for a copy code. Please report any usage problems to Erica or any staff member in 147 immediately.

There is a small copier in room 147 that can be used if necessary for small jobs of ten copies or less.

5. DIVERSITY STATEMENT

In the emerging global, knowledge-driven economy, workforce diversity is essential to business success and at the heart of constructive employment relations. Diversity in physical and social characteristics, combined with diversity in thought and perspective, are engines of innovation that are essential for the 21st Century. This potential is only realized, however, where there is respect and dignity for all and where there is the capability to bridge across cultures and perspectives. In the School of Labor and Employment Relations (LER), we develop next generation leaders in human resource management, the labor movement, government and academe -- all of whom have to be leaders with respect to diversity. Further, we are responsible for advancing the frontiers of practice, policy and theory in this domain, which is an important part of our field of labor and employment relations. Accordingly, we embrace having a diverse student body, staff and faculty, and we are committed to supporting freedom of thought and mutual respect through public engagement, curriculum innovation, student initiatives, and leading-edge research.

6. EQUIPMENT INVENTORY

The accountant (Beryl Forewah, 300-2964, Forewah@illinois.edu) manages all inventory issues for LER. This includes regular tracking and updating along with handling of the biennial physical inventory. In order to meet university compliance, it is important to know (a) what equipment we have and (2) where it is located. In particular, the Dean asks for your understanding of and compliance with the following policies:

1. All requests for computer equipment must be ordered through the IT manager of systems services.
2. Persons wishing to borrow LER equipment for use outside of the building must complete an [employee loan form](#) **prior to** removal of the equipment from the building. Equipment may be borrowed for up to one year at a time and will be renewed annually. It is the responsibility of each person who has borrowed equipment to read Section 12.1 “Custodianship of Property” in Business and Financial Policies and Procedures, and let the accountant know if and when it has been returned so that records can be updated.
3. Equipment which is no longer useful, including that which is obsolete or cannot be repaired, must be approved by someone from the University’s property accounting division before it can be sent to campus surplus or thrown out. This must be coordinated with the accountant so that an onsite visit from property accounting can be done for their approval before removal.
4. Equipment which is moved from one location to another must be updated immediately on LER’s inventory tracking system. Please inform the accountant as soon as possible whenever a piece of equipment (and its inventory number) has been moved.
5. Reference - <http://www.obfs.uillinois.edu/cms/one.aspx?portalId=909965&pageId=930348>

7. ETHICS TRAINING

Mandatory Ethics training is conducted annually for all University employees. The training is online from October 4-November 2. Additional information can be found at: <http://www.ethics.uillinois.edu/policies/empgift.cfm>. Lynne Hovel, lhovel@uillinois.edu, 3-1480, in Room 147 will be monitoring the training and sending reminders as needed.

8. FEDERAL LOBBY DISCLOSURE ACT

Any faculty or staff engaged in lobbying need to comply with the Federal Lobby Disclosure Act (LDA).

http://www.oc.uillinois.edu/announcements/lobbying_disclosure.html is a link to a memo and other documents prepared by Katherine “Kappy” Laing, Executive Director for Governmental Relations. The purpose of these documents is to make sure that all University employees who engage in lobbying, as defined by the LDA, properly disclose the necessary information.

Please review the documents to ensure compliance.

9. FLEX TIME POLICY

All Academic Professional employees are required to work a 40 hour work week. It is understood that most employees will work the majority of those hours between 8 a.m. and 5 p.m. Monday-Friday. Individual employees with a need for a different work schedule can make flex time arrangements with their immediate supervisor. All flex time schedules must have final approval by the Dean.

A separate flex time policy is on record in the Dean’s Office for Civil Service staff.

10. FOREIGN NATIONALS, PAYMENTS TO

The IRS identifies foreign persons in one of two categories for tax purposes, nonresident aliens vs. resident aliens. Because of tax and immigration laws, making payments to foreign national employees, independent contractors, students, and visitors can be a complicated process. Before you consider any action that would result in a payment to a foreign national, please contact Lynne Hovel, lhovel@uillinois.edu, 217-333-1480. Also, refer to the OBFS webpage <http://www.obfs.uillinois.edu/>, select ‘payments to foreign nationals’, then select ‘quick guide to paying short term foreign national visitors’.

11. GIFTS TO EMPLOYEES

Gifts are allowable to departing employees or for special recognition as outlined in University policy see <http://www.obfs.uillinois.edu/gifts/to-employees/> for the complete policy.

12. GIFTS AND PRIZES TO NON-EMPLOYEES

Gifts and prizes, including gift cards/certificates, flowers and plants, given to non-University employees must be tracked to ensure proper reporting if the cumulative value of any type of gift/prize to a single individual is equal to or greater than \$600 in a calendar year. For tracking purposes, gifts/prizes equal to or greater than the University's \$100 de minimis amount must be reported via e-mail to the OBFS, University Payables, obfsupay@uillinois.edu. The department presenting the gift/prize must include the dollar

value of the gift/prize, along with the recipient's name and address in the email. If the amount of the gift/prize is equal to or exceeds \$600 for one individual, the department must provide the OBFS, University Payables with the individual's social security number. This information should be faxed to 217-239-6850.

Note: Gift cards and gift certificates cannot be purchased with a University P-Card (see [Section 7.6, University P-Card](#)), **with a University purchase order, or through the iBuy procurement system.** These purchases must be made using a [Program Advance Form](#) or employee personal funds with reimbursement requested on a [Travel/Employee Expense Reimbursement Form](#) through the OBFS, University Payables.

- Allowability/Funding: Allowable only from Institutional*, gift, endowment income, and service plan funds.

Gifts and Prizes to Nonresident Aliens - Gifts and prizes given to non-University employees who are classified for tax purposes as non-resident aliens must be processed through OBFS, University Payroll to ensure proper reporting and or withholding. For additional information, OBFS, University Payroll can be contacted via phone at 866-476-3586 or via email at paying@uillinois.edu.

Honorariums - Visitors or guests who perform a service to the University are sometimes provided with monetary gifts which must be provided in the form of a check or electronic deposit to the visitor or guest. These "monetary gifts" are known as honorariums and the requirements, policies, and procedures for providing an honorarium are outlined in [Section 17.3, Honoraria](#).

13. GRANTS

Grant proposals need to be processed by the Director of Budget and Resource Planning, (Mary Kay McCallen, 4-1133, Rm 109 LER, mccallen@uillinois.edu) and then at the campus level by our OSPRA (Office of Sponsored Projects and Research Admin), before they can be sent off to the funding agency. Please keep in mind that the director of the budget and the G&C office each need a reasonable amount of time (two to three weeks or one to one and a half weeks each) to analyze your proposal and make sure that the budget part of it is properly prepared along with preparation of the transmittal form. In other words, please allow about three weeks for internal budgetary analysis and processing between the time you finish your proposal and the date your proposal leaves the campus on its way to the funding source. Allowing this amount of time will greatly increase the probability that the director of the budget and the G&S office can give your proposal the attention it deserves, allow time for any needed corrections, and ensure the proposal is sent off in plenty of time to arrive before the proposal receipt deadline.

<http://www.ospra.uiuc.edu/>

14. HIRING STUDENTS

PhD research and teaching assistant assignments will generally be made in May or June. The PhD Advisory Committee will work with Becky Barker, Assistant Dean of Student Services on potential assignments. Any additional requests to hire a student for grading or other research needs should be directed to Becky Barker (ebarker@uillinois.edu), in 149B LER (3-2381). Becky can assist you in identifying a student for the duties you require and also let you know about fund availability and pay rates.

PhD RA and TA appointments will be processed automatically. If you have any other student hires you must contact Lynne Hovel, (lhovel@illinois.edu), 147 LER (3-1480) so that the student can be placed on payroll. The student is not allowed to start working until all of the appropriate forms have been filled out. Failure to contact Lynne with your authorization to hire could result in a delay of pay for the student.

15. PARKING SPACE

The School currently has two parking spaces in lot C9, Space 19 and 20 that can be reserved for visitors. These are on a first come, first served basis. If you would like to reserve one of these spaces, please e-mail ler-reservations@illinois.edu. If it is a last minute request, please call Wendy at 3-2777 or Andy at 3-2021.

16. ROOM RESERVATIONS

The following rooms are available to be reserved for use by LER faculty, staff, and LER student organizations.

35 and 43 (Wagner Education Center)
47
204/236
133A-133G (Recruiting Suite)

Please email ler-reservations@illinois.edu (this e-mail is also in the address book under ILIR contacts) to reserve any of the above rooms. A staff member in 147 LER monitors these requests daily and will send you a confirmation as soon as your reservation request is processed. If you need to speak with someone personally, please contact Wendy Gooch (wgooch@illinois.edu, 3-2777). If Wendy is not available Andy Janes (tjanes@illinois.edu, 3-2021) can assist you. Electronic calendars for these rooms are available in Public Folders/LER/ILIR Calendars that you can view to see when the room is available for use.

17. SERVICE CONTRACT REQUIREMENT

All non-UI employee services require either a purchase order or memorandum of understanding prior to the start of service depending upon the type of service. The reason for the contract is to comply with University policy and to protect us from issues of liability. Some examples of services include catering, photography, design, and printing. Also, stringing of orders is not allowed to avoid the bidding process. Printing is a special case as it involves additional steps before a purchase order can be issued including obtaining bids, and each bidder completing the prevailing wage and soybean ink form. A more detailed list of the rules for printing purchases can be found in the [Campus Administrative Manual](#).

A caterer must appear on the University's [Approved Caterer's List](#), unless the event will consist only of food/beverage drop off. If alcohol will be served then the event must be catered and the caterer must appear on the [Approved Caterer's List](#) and be approved for alcohol. In addition, the [alcohol approval form](#) must be filled out and approved when serving alcohol on University property. Additional information can be found at: <http://www.obfs.uillinois.edu/risk/outside-vendors-providers-contractors/> as well as <http://www.cam.illinois.edu/viii/VIII-10.htm>.

18. SPONSORING EVENTS

Contributions to a non-University entity, such as a professional, civic, social, or political entity (including purchase of advertisement in fund-raising books and brochures) is unallowable from any funds.

<http://www.obfs.uillinois.edu/cms/one.aspx?portalId=909965&pageId=913520>

19. SYLLABUS UPDATES

All faculty should have their current syllabus sent to Chasity Bree at cbree@uillinois.edu by the end of the first week of the current semester. The syllabi will be posted to the LER current courses webpage.

20. TRAVEL

Travel expenditures by employees, student employees and students must serve the best interest of the University (not personal benefit of an individual) and must have a legitimate business purpose and be related to their job/position duties. It is the employee's responsibility to ensure his/her travel arrangements comply with University policies and procedures and his/her claim for reimbursement is accurate. All expenses must be incurred in connection with services performed as a University employee.

All University business travel must be pre-approved by the dean or his authorized delegate regardless of funding source (**submit completed Travel Approval form and estimate to Mary Kay McCallen, Rm. 109 LER, 4-1133, mccallen@uillinois.edu before travel can occur**). In cases where travel is part of the daily business of the unit; i.e. extension instruction off-campus; the department head should be planning and approving travel schedules on a bi-weekly or monthly basis ahead of the travel. They are still responsible for ensuring that all travel is within University guidelines. For complete information on travel expense reimbursement, refer to the Office of Business and Financial Services Policies and Procedures, Business Travel:

<http://www.obfs.uillinois.edu/travel/>

1. All travel must be by the most direct route, using the most economical mode of transportation available considering travel time, costs, and work requirements. If travelers interrupt business travel or deviate from the direct route for personal convenience or personal leave, they will be reimbursed only for uninterrupted travel by the most direct route.
2. Airfare vs. vehicle: The unit head or delegate must approve employee use of private passenger vehicles—if it is the most economical and convenient transportation available. However, travelers who use private passenger vehicles will not be reimbursed for more than the cost of commercial coach round-trip airfare plus transportation to and from the airport.
3. Per diem allowance must always be reduced for any meals provided.
4. Expenses must be substantiated by receipts (required for all purchases over \$10.00) and received by University Payables (UPAY) within 60 days or the

entire reimbursement amount may be treated as taxable income. This 60-day limit is in accordance with IRS regulations.

5. Lodging charges for official conferences/meetings higher than normally allowed under the lodging allowance are reimbursable if the travel has been approved. However, if the Higher Education Travel Control Board (HETCB) does not allow the exception, the traveler may have to refund the disallowed amount to the University account charged for lodging.

Hotel Limits set by HETCB:

- Chicago: \$132.00 (varies by time of year)
- Downstate IL: \$70 or \$80.00 (determined by city)
- Washington DC: \$177.33 (varies by time of year)
- Out-of-State: \$110.00

<https://www.obfs.uillinois.edu/travel/reimbursement-rates/lodging-allowance-rates/>

Hotel Receipts must contain:

- The vendors' name and location
- An itemized invoice
- An invoice with a \$0 balance
- If the room was purchased with a credit card, the receipt must show the last 4 digits of the credit card
- If the receipt doesn't show the last 4 digits, a copy of your credit card statement with the charge highlighted must accompany the original receipt

State of Illinois Preferred Hotel Suppliers:

<http://www2.illinois.gov/cms/Employees/travel/Pages/PreferredHotel.aspx>

For **rail** or **air travel**, the paid receipt must contain:

- The dates/times of travel
- The departing point and destination of travel
- The cost of the travel
- If the ticket was purchased with a credit card, the receipt must show the last 4 digits of the credit card
- If the receipt doesn't show the last 4 digits, a copy of your credit card statement with the charge highlighted must accompany the original receipt
- Must submit original copies of all tickets/boarding passes for which traveler wishes to be reimbursed

For travel by **automobile**:

When requesting reimbursement for private passenger vehicle use, the reimbursement for transportation may not be more than the cost of coach air fare, plus the cost of transportation to and from the airport.

- As a condition of employment, employees are expected to incur commuting expenses between their residence and headquarters. These expenses are not reimbursable. Expenses associated with State business in excess of commuting expenses are reimbursable at headquarters and/or residence. An employee whose travel during a given day does not include travel through headquarters shall be reimbursed for all mileage traveled that day in excess of the employee's ordinary commuting mileage. An employee whose travel does include travel through headquarters shall be reimbursed for all mileage in excess of commuting mileage. All travel must be by the most direct route. Shortest mileage is paid: home to destination or headquarters to destination.
- Mileage Variations --- Any significant variation from distances shown on standard highway maps must be explained on the travel voucher. **Vacation stops are not acceptable.** University policy requires travel by the most direct route.
- Multiple passengers --- When two or more individuals are traveling in the same passenger vehicle only one individual may claim mileage reimbursement.

Other valuable travel information:

Per Diem will not be given for travel **less than 18 hours**.

Per Diem Reimbursement Rates

Daily Allowance Per Diem	\$28.00 (In-State)	\$32.00 (Out-of State)
Breakfast and Lunch	\$5.50 (In-State)	\$6.50 (Out-of-State)
Dinner	\$17.00 (In-State)	\$19.00 (Out-of-State)

- **NOTE:** Some conference registration fees include select meals. In such instances, the faculty member should not seek per diem meal allowances for the meals included in the conference fees.

If you are planning foreign travel please see the Foreign Travel section of the OBFS Travel Guide as policies and rate reimbursements are different from domestic travel rates. (http://aoprals.state.gov/web920/per_diem.asp)

Additional guidelines:

- All reimbursable purchases over \$10.00 must have an accompanying receipt
- Receipts are not required for expenses \$10 or less, however, these expenses must be itemized and documented.
- All required receipts must be taped flat to an 8.5" by 11" sheet of paper, with no staples

LOST RECEIPTS - If you do not have a required receipt, it will be necessary to either obtain a duplicate or submit a copy of your credit card statement showing the charge.

Please turn in travel receipts to Lynne Hovel, 147 LER, 3-1480, lhovel@illinois.edu, upon completion of your trip for reimbursement processing.

2/23/15 rev.

21. VISITING SCHOLARS

Please contact Lynne Hovel (lhovel@illinois.edu) in 147 LER (3-1480) as soon as you begin talking with a potential visiting scholar. J-1 visas can take two months or more to process and the visit can only occur during the period the visa is valid. Additional information about visiting scholars can be found at:

<http://iss.illinois.edu/scholars/dept.shtml>

22. WEB UPDATES

Chasity Bree, cbree@illinois.edu, is handling corrections and updates to the website. Please email Chasity the URL and text changes requested as they occur.