LIGO-M2200251-v1	**Visitor Program Applications for LIGO Laboratory M&O**	**02-May-2023**

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This is an internal working note of the LIGO Laboratory.

All signatures/approvals capture in the DCC via electronic signatures.

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Hannah Hansen, Business Manager, date

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Jameson Rollins, Visitor Program Chair, date

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Nately Sych, Visitor Program Administrator, date

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Eadie Balint, Travel Coordinator, date

Visitor Program Overview

The LIGO Visitors Program has been hosting scientists and engineers since 1996. This program is focused on applicants at the graduate level or above who wish to visit the LIGO Laboratories to become involved in the science and techniques associated with the field of interferometric gravitational-wave detection, while at the same time contributing their accumulated skills and abilities to enhance the performance of the LIGO team.

For undergraduate applicants, the LIGO Summer Undergraduate Research Fellowship program **(SURF)** provides opportunities for those wishing to gain research exposure to LIGO science and technology.

To qualify for this, visitors must apply for it under the Visitor Application site found here: https://www.ligo.caltech.edu/page/visitor-program. Once they apply, anyone on the Visitors Program mailing list (visitorprogram@ligo.caltech.edu) will receive an email notification with a pdf of the application.

Visitor Program Responsibilities

- **Visitors Program Chair**: Jameson Rollins: The Chair is responsibility for overseeing the Visitor's Program, including but not limited to:

    ⇒ Evaluating visitor applications with the proposed Sponsor to ensure the visit fits within the outlined purpose of the visitor's program.
    ⇒ Coordinate with VP Administrator and Sponsor to establish a budget for the trip.
    ⇒ Send visitor proposals, including budget, to the Staffing Committee with a recommendation.
    ⇒ Coordinate with the visitor's sponsor to conduct an exit interview with the visitor to obtain feedback on their experience and the program.
    ⇒ Manage visitor program budgets.

- **Visitors Program Administrator**: Nately Sych: The Program Administrator is responsibility for overseeing all administrative aspects of the Visitor's Program. If the visitor application passes the initial screening:

    ⇒ Respond to Visitor Applications
    ⇒ Manage the visitor primary tracking list (M2300080).
    ⇒ Create a DCC record for the Visitor and upload the visitor application.
    ⇒ Collaborate with the Program Chair and Travel Coordinator on a budget for the visit, so that the Program Chair can submit the application and budget to the Staffing Committee
    ⇒ Responsible for uploading all required documents into the DCC: visitor application, approved budget, terms and conditions letter to visitor, expense reports, final report and any other documents related to the visit.
    ⇒ Update the Staffing Committee agenda as needed related to the Visitors Program

- **Travel Coordinator**: Eadie Balint: The Travel Coordinator is responsibility for overseeing the travel and expense reimbursements for the Visitor.

⇒ Coordinate with visitors to make travel arrangements per the visitor Approval Letter and the Budget.

⇒ Obtain approval from the VP Chair and Sponsor for any travel requests/arrangements over the agreed upon budget. If approved, coordinate with VP Administrator to update budget document.

− **Visitor Sponsor**: The sponsor is responsibility for overseeing the visitor.

⇒ Ensure that the Visitor is fulfilling duties as agreed to as part of the application.

⇒ Manage any special requests or issues.

⇒ Upload any deliverables to the DCC and link to the visitor's DCC record.

⇒ Ensure the final visitor report is received and provided to the VP Administrator.

Administrative Procedures

1. The Visitor Program (VP) Administrator is responsible for completing the initial application review to determine if the application is valid. There are times when applications will be received, and the information is not readable, or the application is not credible. The VP Administrator can delete these without responding. If there is uncertainty the VP Administrator should email the Visitors Program Chair.

2. Application Initial Review: Upon determining that the application is valid, the Visitor Program Chair reviews the application thoroughly to ensure it is complete. If there is not a sponsor listed on the application, the Visitors Program Chair will determine if someone in the Lab is familiar with the applicant or if someone is willing to be the sponsor. If there are no sponsors available, a message will need to be sent to the applicant advising them that their application was not approved. The Visitors Program Chair is primarily responsible for this communication. If the application is valid and with a sponsor, the VP Chair will notify the Administrator to initiate the process in the next step.

3. Initial Documentation: The Program Administrator will need to create a DCC record for the Visitor. An M document should be reserved and the DCC title should have the following naming standard: "Visitor Program: [Name]-[Institute]- [Type of Appointment]" The Abstract should contain the Sponsor's name, duration of the appointment, and the purpose of the visit. All documents should be added to this record for the Visitor: Application, Approval Letter, Budget, Expense Reports, etc. This record should be linked back to the appropriate fiscal year Visitor Program DCC tree record. A Visitor Budget for the Staffing Committee to review must be created by the LIGO Travel Coordinator, VP Administrator, and VP Chair. This should be based off the Visitor's program application budget section and documented estimates for flights, lodging, etc. The budget template is in the DCC: https://dcc.ligo.org/F2300003. Below is a list of general best practices for creating a travel estimate. Cardquest (via Access.Caltech) can be utilized to calculate the cost of an airline ticket and rental car, plus applicable taxes.

     a. To calculate the lodging, utilize the GSA per diem rate which can be found here: https://www.gsa.gov/travel/plan-book/per-diem-rates. (CIT stays in Pasadena, CA, LLO stays in Denham Springs or Baton Rouge, LA, and LHO stays in Richland, WA).

        i. The GSA rate is the maximum amount per day that can be budgeted. The best effort should be made to secure affordable, yet safe, lodging accommodation.

     b. Per diem is also calculated using the GSA per diem link. If the person is staying longer than 2 weeks, the rate is usually reduced in ½, if they are provided accommodations that include a kitchen or kitchenette. The VP Chair and Sponsor should decide on a reasonable per diem.

     c. A rental car only applies for visitors to LLO and LHO.

     d. Miscellaneous expenses may include baggage fees, transportation to/from lodging accommodation, etc.

     e. Forward the Visitor Application email and attach the Budget (in pdf format) to the VP Chair. The VP Chair will then forward it to the Staffing Committee via email and/or it will be brought up for review in the next Staffing Committee meeting.

     f. The VP Administrator must reply to the application and advise the applicant: "Your application has been received and will be reviewed at the next Staffing Committee meeting which takes place in the middle of the month. You will be advised of the outcome shortly after that."

4. The Staffing Committee will review it and either approve or deny it. If denied, the Visitors Program Chair replies to the Visitor Applicant and advises them that it was denied.

5. Upon Staffing Committee approval, an Approval Letter must be written and emailed to the approved Visitor. The letter will need to be updated with the pertinent information.

     a. This letter template can be found in the DCC: F2300005

6. The Program Administer should email the visitor using one of the "Email" templates, found in Box (https://caltech.box.com/s/0yx12ratdqrx1av1q7h446k7w14frcam) depending on if they are going to be a Visitor, VSR, or Guest. Adjust the emails as necessary to fit the situation.

     a. Include all who are cc'd on the approval letter (full list at the bottom of the letter) in the email communication.

7. The Program Administrator should proceed with the appointment procedure (M1900007) after the Visitor confirms details of their approved appointment.

8. Once the appointment is complete and the visitor has their Visa approved (if necessary) the VP Administrator will notify the Travel Coordinator so they can initiate travel arrangements.

9. Once the visit is complete, the Travel Coordinator will finalize the expense report and submit it. In addition, the visitor must submit a Final Report to the VP Administrator as indicated on their Approval Letter. If the Visitor is not compliant the Visitor Program Chair and the Sponsor should be advised and consulted for support.