PROFESSIONAL DEVELOPMENT POLICY, GUIDELINES & PROCEDURE

The University Libraries encourages its employees to pursue professional development and travel opportunities consistent with the educational, research, and professional needs of the University and which enhance their usefulness to their profession and the University. To this end, the Libraries will support, to the best of its ability, attendance at professional workshops, travel to professional conferences and meetings, and travel in which the employee is a designated representative of the University. Particular effort will be made to support the travel and professional development of new faculty.

The Libraries' Faculty Professional Development (FDP) Committee oversees the allocation of professional travel/development funds for faculty. The Staff Professional Development (SDP) Committee oversees the allocation of professional travel/development funds for staff. Guidelines for said allocation are as follows:

- Before an employee works off-campus (including travel to satellite campuses), they must submit a **Professional Development Leave & Funds Request form** (found on the Libraries forms page), so the University can extend its liability coverage beyond the campus boundaries.
- **Administrative funds** (as opposed to professional development funds for travel to professional or academic conferences) can be requested under certain circumstances; requests must be made directly to the Executive Director.
  - o Administrative funds can be requested to reimburse or cover travel required for employee duties, such as teaching at a branch or satellite campus, picking up donated materials, or other travel undertaken at the request of the Executive Director.
  - o In lieu of administrative funds, employees can use the library van if travelling in a group or with cargo to transport. The Van Request form must be completed and submitted to the Facilities Manager.
  - o If an employee is presenting a poster session, administrative funds can be requested to cover the cost of printing.
- Those seeking remote training, such as registering for a webinar, should refer to the Libraries' Administration Department for guidance.
- No funds will be provided for travel within the city of Memphis, but registration fees for events held in Memphis are eligible for support.
- To qualify for funds within a fiscal year, the beginning of a projected trip must occur during the same fiscal year. For example, if a conference runs from June 28, 2017-July 2, 2017, only funds from FY 2016-2017 may be applied; funds from FY 2017-2018 are not available.
- All requests for travel funds and deadlines for the preparation and submission of necessary forms will be governed by the **UofM Travel Policy BF4001** (policies.memphis.edu/UM1309.htm). All travel must be approved in advance in accordance with relevant policies, guidelines, and procedures. Employees are encouraged to apply for anticipated travel as early in the fiscal year as possible.
- Authorization for in-country (the contiguous 48 states and D.C.) travel must be approved by the Executive Director through the employee's supervisor; authorization for travel to Alaska, Hawaii, and out-of-country travel must be approved by the President.
- **The FPD Committee** will divide the total budgeted funds equally amongst all faculty: tenure track, tenured, visiting and adjunct. New faculty will also be provided with additional noncompetitive professional development funding in their first year and should apply to the FPD Committee to use those funds. Faculty must commit their allotted funds by April 1. Any remaining funds will return to the general travel funds and faculty may apply to the FPD Committee for those funds to be used by the end of the fiscal year.

PROCEDURE

1) Pay close attention to time allowance. Employees are encouraged to submit requests for anticipated travel as early in the fiscal year as possible. **If prepayment for registration and other costs is expected, the request process must begin at least one month before the date of travel or event**.

2) Complete section A and B of the request form and **submit to your supervisor for their signature of approval** and comment of recommendation. If the Executive Director is your supervisor, submit the form to them.

3) **Attach necessary documentation to your form**, including: original receipts in hand, quotes or receipts for flights, and information about the conference and conference hotel or professional development session.

4) **The form should be submitted at this stage at least two weeks prior to travel or event.**
    a. If funds are requested, submit the form to the Chair of the Faculty Professional Development (FDP) Committee (oversees the allocation of professional travel/development funds for faculty) or the Staff Professional Development (SDP) Committee (oversees the allocation of professional travel/development funds for staff). If requested funds are approved by the Chair of the FPD or SPD Committees, the Chair will route the form to the Administration Department for processing. The Chair will give a copy of the completed form to the applicant and retain a copy for committee records. Once submitted to Administration, if the Executive Director increases or decreases the approved amount, the Chair will be notified and then notify the applicant.
    b. If no funds are requested, submit the form to the Administration Department for the Executive Director's approval and processing.
5) **To be reimbursed for approved travel**, **submit the UofM "Claim for Travel Expenses" form** (http://bf.memphis.edu/forms/trav/trav02.htm) **accompanied by any additional original receipts within three working days after completion of travel** (or sooner if travel occurs near the end of the fiscal year) to the Administration Department. Failure to submit this form in a timely manner can result in not being reimbursed. The amount reimbursed to the applicant will not exceed the amount approved even if the applicant's actual expenses are higher than indicated on the original request.