

**THE UNIVERSITY OF ARIZONA LIBRARIES  
CLASSIFIED STAFF  
PROFESSIONAL DEVELOPMENT AND TRAVEL FUNDS GUIDELINES  
FY2005-06**

**Purpose**

The purpose of the Staff Professional Development and Travel Funds is to encourage staff participation in discretionary professional and skill development activities such as professional workshops, seminars and conferences and to support travel expenses related to distance activities. The primary purpose of the funds is to support travel to out of state events that an employee might not otherwise afford.

Staff Professional Development and Travel Funds can be used by any regular, benefits-eligible classified staff member of the University of Arizona Libraries and the Center for Creative Photography who wants to engage in discretionary professional and skill development activities in areas related to any team's work (current or future). These activities need to be beneficial both to the classified staff in his/her own professional development and beneficial to the Libraries either to current or future functional work or team work.

**General**

1. Professional Development funds may be used for **professional development specified under Eligible Activities which does not qualify for Training, Administrative Travel, In-State Travel or One-Time Funds**. Travel funds may be requested for travel related to out-of-state professional development workshops, seminars and conferences or instate travel at 200 or more miles of ground travel.
2. Classified staff interested in utilizing Professional Development and Travel Funds will need to write a brief justification statement which connects the workshop/conference to the professional development of the individual and the benefit to the Libraries and/or team(s) under which the individual serves.
3. The Staff Governance Association (SGA) Board encourages all classified staff to apply for Staff Professional Development and Travel Funds when appropriate and reminds staff they have 24 days of professional leave allotted per year per the Libraries' internal policy.
4. Professional Leave must be planned with the team and approved by the team leader in advance of the leave by submitting an Exception Slip.
5. Staff should be aware that funds cannot be spread equally to each employee, so staff should prioritize their requests and submit them at their earliest convenience to take advantage of available funding. There is no guarantee of available funding. Requests will be approved on a first come, first serve basis. *However, no more than two thirds of the money will be encumbered/expended in the first 6 months of Fiscal 2005/2006.*
6. Staff should try to use the most economical source of transportation and lodging whenever possible.
7. The role of the team leader in authorizing appropriate funding and leave has not changed. A work team leader cannot provide signature approval.
8. For any questions related to travel and training funding, reimbursement and UA/Libraries policies, see your team's Accounting, Budgeting and Customer Support (ABaC\$) accountant. ABaC\$ accountants will process and keep track of the use of funds and provide monthly reports to the SGA Board, the dean and team leaders on the use of funds. Tallies will show:
  - o Who has been awarded trip funds, for what event, total expense
  - o How much money has been spent
  - o How much money has been encumbered
  - o How much money is left to use
8. The SGA Board develops the guidelines for the Staff Professional Development and Travel Fund.
9. The SGA Board will conduct post-audit reviews in May/June 2006 on the usage of the Staff Professional Development and Travel Funds.

**Eligibility**

Permanent classified staff who are benefits eligible (.50 or greater FTE)

**Available Funding & Limits**

The Staff Professional Development and Travel account has \$15,000 in funds for FY05/06 for all regular, benefits-eligible classified staff. Team leaders may approve appropriate requests on a first come, first serve basis as long as funding remains in the fund. When the money runs out, no more trips will be approved. *However, no more than two thirds of the money will be encumbered/expended in the first 6 months of Fiscal 2005/2006.*

Funding limits:

- Staff will be funded for up to **three (3) requests**:
  - One fully funded out-of-state request up to \$850.00. **Only** out-of-state trips will be funded up to \$850.00. **Staff should prioritize which trip they want to be fully funded.**
  - One request can be funded up to \$350.00
  - One request can be funded up to \$150.00
  - A third request will be funded only if monies are available.

**Eligible Activities & Allowable Expenses**

1. To attend a conference/seminar/workshop or other training event that is not required by the Libraries for staff’s job (may be in or out of the library/museum field if related to an individual’s functional responsibilities).
2. To attend a user or networking group meeting in staff’s field where attendance is not required by the Libraries.
3. To attend a professional association committee meeting where the employee is a member.

<b>In-State Trips</b>	
Staff Prof. Dev. & Travel Funds-Covered Expenses (up to \$350.00 max) including:	Not Covered
<ul style="list-style-type: none"> <li>• Registration (take advantage of early bird rates whenever possible)</li> <li>• Ground Transportation:               <ul style="list-style-type: none"> <li>○ Auto rental costs for trips outside of Tucson, including fuel (see below at Auto Rental† or your ABaC\$ accountant for current policy)</li> <li>○ Car pooling is the most cost effective means and is <u>encouraged</u>. If more than one person attends an event, they must car pool.</li> </ul> </li> <li>• Lodging:               <ul style="list-style-type: none"> <li>○ While on an in-state trip that requires 200 or more miles ground travel, one night of lodging will be paid for at the University allowable rate (see below at Lodging Expenses‡ or your ABaC\$ accountant for current policy).</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Use of the UA Motor Pool is <u>not</u> an option for the Libraries</li> <li>• Use of privately owned vehicles is highly discouraged and travelers will <u>not</u> be reimbursed for mileage</li> <li>• Lodging for trips of less than 200 miles</li> <li>• Meals will <u>NOT</u> be covered</li> </ul>

<b>Out-of-State Trips</b>	
Staff Prof. Dev. & Travel Funds-Covered Expenses (up to \$850.00 max) including:	Not Covered
<ul style="list-style-type: none"> <li>• Registration – take advantage of early bird rates whenever possible</li> <li>• Coach/economy airfare, OR</li> <li>• Ground Transportation:               <ul style="list-style-type: none"> <li>○ <u>When projected cost of ground travel is less than the cost of airfare</u></li> <li>○ Auto rental costs for trips outside of Tucson, including fuel (see below at Auto Rental† or your ABaC\$ accountant for current policy).</li> <li>○ Car pooling is the most cost effective means and is <u>encouraged</u>. If more than one person attends an event, they <u>must</u> car pool.</li> </ul> </li> <li>• Taxi to/from destination airport and conference</li> <li>• Lodging will be paid for at the University allowable rate (see below at Lodging Expenses‡ or your ABaC\$ accountant for current policy).</li> </ul>	<ul style="list-style-type: none"> <li>• Use of UA Motor Pool</li> <li>• Use of private vehicle</li> <li>• Meals will <u>NOT</u> be covered.</li> </ul>

† Auto Rental Policy: The traveler makes the car rental agency arrangement and should take advantage of the discounts at <http://www.fso.arizona.edu/fso/travel/rentals.asp>, as well as follow the UA guidelines for reimbursement for Rental Vehicles at <http://www.fso.arizona.edu/fso/deptman/14/1415tran.html>. The driver must be over 25 with a valid driver’s license and a major credit card to pay, pick up and drive one of the vehicles. When you return from the trip, submit your original receipts to your accountant to get reimbursed for auto rental and fuel expenses. See your accountant for any questions.

‡ Lodging Expenses fall under the current UA-Covered Travel guidelines for coverage of expenses (including allowable travel and lodging costs) at 14.71, Meals/Lodging Cost Index. See your accountant for any questions.

<b>Web Seminars and Teleconferences</b>	
Staff Prof. Dev. & Travel Funds-Covered Expenses (up to \$350.00 max) including:	Not Covered
<ul style="list-style-type: none"> <li>• Registration <u>only</u></li> </ul>	<ul style="list-style-type: none"> <li>• Travel expenses</li> <li>• Any additional materials</li> </ul>

**Application Procedures**

Applications for Staff Development and Travel Funds should be made in advance as much as possible, preferably at least 3 to 4 weeks before the conference/activity. Applications go to team leaders and then to the team’s accountant in ABaC\$, so one must allow time for those steps in the process.

1. The employee completes the Request Form and attaches the following supporting documents:
  - a. A copy of the workshop, seminar or conference flyer and completed registration form, showing date(s) and location of conference/activity, registration fee and organization address and phone. **WORKSHOP INFORMATION IS NECESSARY FOR ALL EVENTS/ACTIVITIES FOR AUDIT PURPOSES.**

- b. A justification statement which states specifically how the professional development activity relates to the employee's work, commitments and/or goals and the benefit to the Libraries and/or team(s) under which the individual serves. This justification is for team leader's examination and audit purposes only.
  - c. THESE TWO (2) ESSENTIAL DOCUMENTS SHOULD BE STAPLED TO THE REQUEST FORM and are to remain with the Request Form throughout the process. You may want to make a copy for yourself.
2. The employee submits the completed form and supporting documents to the team leader for her/his approval.
3. (Employees should also verify the timing of the event in reference to their professional leave time and the needs of the team with their teams/team leaders.)
4. The team leader reviews the Request documentation against the current policies/guidelines for the year for Staff Professional Development and Travel Funds.
5. The team leader approves and signs (or denies) the Request and returns the Request Form and supporting documentation to the requestor.
6. The requestor submits the completed, signed Request Form with its attached 2 supporting documents to ABaC\$ for processing.
7. ABaC\$ reviews the Request documentation as follows:
  - a. The Request Form is completely and accurately filled out with the requestor's name and employee id number (EID), destination, dates of travel, registration and other costs and information.
  - b. The Request Form has been signed and dated by the requestor and the team leader.
  - c. Two supporting documents (flyer and justification) have been attached (see #1 above).
8. Purchase transactions:
  - The requestor is encouraged to ask their team administrative assistant to use the team's p-card to register and purchase air travel, if applicable, but not lodging or auto rental, for the conference/activity. Be prepared to pay for lodging and auto rental with your own credit card.
  - If preferred, the requestor may purchase registration, etc. with his/her own credit card and request reimbursement later. Be sure to obtain receipts and save to submit after the conference/activity.
  - An option for travelers is to apply for a corporate credit card for business-related travel expenses and then submit bill/receipts to get reimbursed. The site to apply for this personal credit card is <http://www.fso.arizona.edu/fso/travel/corporate.asp>.
  - **As soon as possible after a purchase is made with the team's p-card, the team administrative assistant should submit the receipt with a Funding Source/Info Sheet to ABaC\$ for processing.**
  - IF FOR ANY REASON, AN EMPLOYEE DOES NOT ATTEND A CONFERENCE/ACTIVITY FOR WHICH HE HAS BEEN APPROVED, HE SHOULD CONTACT HIS TEAM LEADER AND TEAM ACCOUNTANT IMMEDIATELY. If it is not possible to get a refund, THE EMPLOYEE **WILL BE RESPONSIBLE** FOR CHARGES ON THE TEAM'S P-CARD ON HIS BEHALF INCLUDING AIRFARE AND REGISTRATION.
9. Upon return/completion of the conference/activity, attendees need to provide required information and original receipts to their ABaC\$ accountant in order to receive the maximum reimbursement within their approved funding level. Attendees should make a copy of all receipts and documents prior to submission of originals.
10. Attendees should be prepared to report on their activities back to the Libraries. Activity reports can be done through an informal presentation at a regular team meeting, in a developmental review or a presentation at a larger group meeting if warranted.

**See the Request Form (next page)**

**UNIVERSITY OF ARIZONA LIBRARIES  
CLASSIFIED STAFF  
REQUEST FOR PROFESSIONAL DEVELOPMENT AND TRAVEL FUNDS**

1. **Name of employee to participate in workshop, seminar or conference and full description including date(s) and location/travel destination.** ( \*Attach a flyer or copy of pertinent materials which describe what, when, where, fees and address/phone number regarding sponsoring organization)

Name \_\_\_\_\_ EID \_\_\_\_\_

Date(s) \_\_\_\_\_

Location/Travel Destination \_\_\_\_\_

Title/Type of Conference/Workshop/Seminar \_\_\_\_\_

\_\_\_\_\_

2. Request number for this FY (check one box in A). I am requesting a funding max of (check one box in B)

<b>A</b>	<input type="checkbox"/> this is my first request <input type="checkbox"/> this is my second request <input type="checkbox"/> this is my third request, if monies are available
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<b>B</b>	<input type="checkbox"/> full funding up to \$850.00 (out of state only) <input type="checkbox"/> funding up to \$350.00 <input type="checkbox"/> funding up to \$150.00
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3. **Costs for which you are requesting funds:** (note allowable expenses from guidelines)

Registration \_\_\_\_\_

Travel/transportation \_\_\_\_\_

Lodging \_\_\_\_\_

Total Costs \_\_\_\_\_

4. **Justification Document: Describe how this activity will provide knowledge and/or skills which support your professional development and how this will benefit the libraries/CCP and/or team(s) now or in the future** (less than one page should suffice). ( \*Attach to Request Form)

5. **Employee's signature and date** -- My two supporting document are attached:

Conference flyer or similar description \*                       Justification document \* (see #4 above)

\_\_\_\_\_

6. **Team leader's approval signature and date**

\_\_\_\_\_

sgaboard 9/29/05