

University Libraries  
Faculty Travel/Professional Development Policy, Guidelines and Procedures

Policy

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

Guidelines

The University Libraries Faculty Travel/Professional Development Committee (henceforth referred to as "the Travel Committee"), appointed by the Dean of Libraries, will allocate funds for professional travel/development. The following statements serve as guidelines to the Committee in allocating funds:

1. All requests for travel funds and deadlines for the preparation and submission of necessary forms will be governed by the U of M Operating Procedure UM1309 (<http://policies.memphis.edu/UM1309.htm>).

All travel must be approved in advance in accordance with relevant policies, guidelines, and procedures. Faculty 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 Dean of Libraries through the faculty member's supervisor; authorization for travel to Canada must be approved by the President; authorization for travel to Alaska, Hawaii, and out-of-country travel is subject to the recommendation of the President and written advance approval by the Chancellor.

2. New tenure-track faculty. The Travel Committee will make funds available to new tenure-track faculty on a non-competitive basis. These funds are separate from any non-competitive funds that might be provided by the Library Administration. The total of these funds will not exceed 33% of the travel budget. A suggested individual allocation for 2005-2006 is: 2<sup>nd</sup> year--\$900; 3<sup>rd</sup> year--\$700; 4<sup>th</sup> year--\$500; 5<sup>th</sup> year--\$300. New faculty will need to apply to the Travel Committee for these funds and are encouraged to apply for additional competitive funds by submitting an application to the Travel Committee. The new faculty member must obligate these non-competitive funds before March 1; remaining funds return to the general travel funds.

3. The table, "Recommended Levels of Support for Travel" (Attachment 1), shows recommended levels of support only. Depending on the budget allocations, the Travel Committee may recommend partial funding.

#### Procedures

Applicants should:

- Submit a request for professional leave to their supervisor; obtain supervisor's recommendation
- Request travel funds by completing the forms listed below and submitting them to the appropriate supervisor as soon as all information is known. Applicants are strongly encouraged to seek the best travel fares/rates possible. Requests should be submitted as early in the fiscal year as possible.
- Complete the Libraries' "Application for Faculty Professional Development Travel Funds" (Attachment 2).
- Write a short (few sentences) justification for the travel request on a separate sheet of paper.
- Complete a University "Request for Travel Authorization" (Attachment 3).
- Attach a copy of the Web page showing the latest CONUS rates for the appropriate travel site.
- Submit the original and two copies of the Libraries' "Application for Faculty Professional Development Funds" and the original of the University's "Request for Travel Authorization" to the Travel Committee.
- Faculty should submit a travel request even if there are no travel funds available. This will provide the University Libraries with an accurate account of needed funds and document that the faculty member is on approved professional leave.
- Upon receipt, the Travel Committee will review the request and recommend funding. When funds are available, the Travel Committee will attempt to fund the maximum allowed for each level according to established guidelines developed by the Travel Committee. The Committee may take into consideration the previous allotment for an individual during the fiscal year.
- The Chair of the Travel Committee will handle the request forms as follows:
  - Route the original of the Libraries' "Application for Faculty Professional Development Travel Funds" indicating the amount approved by the Travel Committee and the original of the University's "Request for Travel Authorization" to the appropriate person in Library Administration for processing.
  - Return a copy of the Libraries' "Application for Faculty Professional Development Funds" with the amount approved by the Travel Committee to the applicant for their records.
  - Retain a copy of the Libraries' "Application for Faculty Professional Development Funds" for Travel Committee records.
- If the Dean of Libraries increases or decreases the amount approved by the Travel Committee, the Dean will notify the Chair of the Travel Committee.

- The amount reimbursed to the applicant normally will not exceed the amount approved even if the applicant's actual expenses are higher than indicated on the original request.
- To be reimbursed for approved travel, applicants must complete a University "Claim for Travel Expenses" form (Attachment 4) and return it to the appropriate person in Library Administration, accompanied by original receipts. This form should be submitted within three working days after completion of travel or sooner if travel takes place near the end of the fiscal year. (Applicants should list their name and Social Security No., and complete Section A. The appropriate person in Library Administration will complete the remainder of the top portion-- TA number, Account no., Object Code, etc.)
- Failure to submit reimbursement forms in a timely manner can result in an individual not being reimbursed for expenses incurred.
- Upon receipt of reimbursements, applicants must return a copy of the check stub or forward the direct deposit notification to the appropriate person in Library Administration. This will facilitate the process of closing out this transaction including the de-obligation of funds that were not spent. De-obligated funds are returned to the general fund and become available to support other requests.

18 July 2005

Attachment 1

**RECOMMENDED LEVELS OF SUPPORT FOR FACULTY PROFESSIONAL DEVELOPMENT**

LEVEL I: Professional obligations: e.g. committee officer or committee member; program participant, conference in area of primary position responsibility; required job training

	TIME	FEES	TRAVEL	LODGING	PER DIEM
Out-of-State	Full	Full	Full for early bird or early registration	Half CONUS or Conference hotel rate	Half CONUS Rate
In-State	Full	Full	Full	Half	Half **No meals for in-state travel unless overnight travel is involved.**

LEVEL II: Organization member or training

The Travel Committee will consider each application, as funds are available and according to the following table:

	TIME	FEES	TRAVEL	LODGING	PER DIEM
Out-of-State	Full	Full	Half	Half CONUS or conference hotel rate	Not funded
In-State	Full	Full	Half	Half	Not funded

LEVEL III: Nonmember

The Travel Committee will consider each application, as funds are available and according to the following table:

	TIME	FEES	TRAVEL	LODGING	PER DIEM
Out-of-State	Full	Full	Half	Half CONUS or conference hotel rate	Not funded
In-State	Full	Full	Half	Half	Not funded

