

UNIVERSITY LIBRARIES PROFESSIONAL DEVELOPMENT LEAVE & FUNDS REQUEST FORM

NOTE: Consult attached Professional Development Procedure before filling out this form.

Section A: REQUEST FOR LEAVE

Name: _____ Dept: _____ U#: U _____ Application Date: _____

Status: Faculty Staff Leave Requested: ___ Hours ___ Days Depart. Date: _____ Return Date: _____

Event Description: _____ Location: _____

Relevance to job duties: _____

Org. Member? Yes No Cmte. member/officer/event participant? Yes No Explain: _____

Funding Class (see attached Reimbursement Guidelines): I II III

No funds requested External funding (grants, etc.)

Section B: REQUEST FOR FUNDS

Advance payment requested Registration deadline: _____

Fees (registration, etc. Late fees for missed deadlines are not covered.) Please specify: _____ \$ _____

Transportation

Airline or train fare, round-trip, tourist (must attach original passenger receipt): \$ _____

Parking Fees (Airport/hotel), Limo/Taxi, Subway, Metrorail, Tolls, Ferries, Shuttle (receipt preferred but not required): \$ _____

Rental Car (round trip; must attach original receipt): \$ _____

Library Van (no mileage reimbursement): \$ _____ N/A _____

Personal Automobile: round trip mileage (\$0.56 per mile) \$ _____

Single Shared: Driver Passenger (with whom: _____)

Total Transportation: \$ _____

Lodging (see attached guidelines for rates)

Advance payment requested

Day 1: \$ _____ + tax \$ _____ = \$ _____ Day 2: \$ _____ + tax \$ _____ = \$ _____

Day 3: \$ _____ + tax \$ _____ = \$ _____ Day 4: \$ _____ + tax \$ _____ = \$ _____

Day 5: \$ _____ + tax \$ _____ = \$ _____ **Total Lodging (including tax): \$ _____**

Meals (see attached guidelines for rates)

Departure Day (75% of CONUS rate): \$ _____ Day 2: \$ _____ Day 3: \$ _____

Day 4: \$ _____ Day 5: \$ _____ Return Day (75% of CONUS rate): \$ _____ **Total Meals: \$ _____**

Expenses (Fees + Transportation + Lodging + Meals): \$ _____

Less Honorarium Amount: \$ _____

Total Expenses: \$ _____

Total Amount Requested: \$ _____

Section C: SIGNATURES FOR APPROVAL

Requestor Signature: _____ Supervisor Signature: _____

Supervisor Recommendation: _____

Committee Chair Signature: _____ Date: _____ **Amount Funded: \$ _____**

Committee Comments: _____

Executive Director Signature: _____ Date: _____ **Action:** Approved Denied

Executive Director Comments: _____

Updated: 2/23/2022

REIMBURSEMENT GUIDELINES

FUNDING CLASSES:

- Class I: Organization officer, committee member, program participant (Full registration fee, full travel, half of lodging, half of per diem)
- Class II: Organization member (full registration fee, half of travel, half of lodging, none of per diem)
- Class III: Organization non-member (full registration fee, half travel, half of lodging, none of per diem)

LODGING RATES:

In Tennessee: bit.ly/instaterates

CONUS rates do not apply — maximum reimbursement allowed depends upon locale

- Level I - Davidson Co. (Nashville)..... \$145.00 + tax
- Level II - Anderson Co. (Clinton), Gatlinburg, Hamilton Co. (Chattanooga), Knox Co. (Knoxville), Pigeon Forge, Sullivan Co. (Bristol and Kingsport), Montgomery Co. (Clarksville), Putnam Co. (Cookeville), Rutherford Co. (Murfreesboro), Washington Co. (Johnson City), Williamson Co. (Franklin), and Fall Creek Falls, Henry Horton, Montgomery Bell, Natchez Trace, Paris Landing & Pickwick State Parks.....\$114.00 +tax.
- Level III - All other counties and cities not listed above.....\$89.00 + tax
- Conference hotel - Requires convention brochure or conf. hotel reservation form listing rate with claim..... actual cost + tax

Out-of-State: Use CONUS rates: www.gsa.gov/portal/category/21287

- Locations listed in CONUS CONUS + tax
- All locations not listed in CONUS..... \$89.00 + tax
- Conference hotel (requires convention brochure or conf. hotel reservation form listing rate with claim)..... actual cost + tax
- International (all locations)..... actual cost

MEALS & INCIDENTALS: ALLOWED ONLY WHEN OVERNIGHT TRAVEL IS INVOLVED

In Tennessee: **CONUS rates do not apply — maximum reimbursement allowed depends upon locale**

Full Day Rates:

- Level I-Davidson Co. (Nashville)..... \$66.00
- Level II-Knox Co. (Knoxville), Montgomery Co. (Clarksville), Pigeon Forge, Putnam Co. (Cookeville), Rutherford Co. (Murfreesboro), Shelby Co. (Memphis), Sullivan Co. (Bristol and Kingsport), Washington Co. (Johnson City), Williamson Co. (Franklin), and Fall Creek Falls, Henry Horton, Montgomery Bell, Natchez Trace, Paris Landing & Pickwick State Parks..... \$46.00
- Level III- All other counties and cities not listed above..... \$46.00

Departure and Return Day Rates:

- Level I=\$49.50; Level II=\$34.50; Level III=\$34.50

Out-of-State: Use CONUS rates found on web at: www.gsa.gov/portal/category/21287

Locations listed in CONUS:

- Full day = Full CONUS rates; Departure/return days = CONUS Rates (75% of daily rate)

Locations NOT listed in CONUS:

- Full day = \$46.00; Departure/return days =\$34.50

International (all locations):

- Full day = Actual expense or \$71.00 per day; Departure/return days = 75% of actual expense or \$53.25

PROFESSIONAL DEVELOPMENT GUIDELINES & PROCEDURE

GUIDELINES

- For insurance purposes, before an employee works off-campus, they must submit a **Professional Development Leave & Funds Request form**, and have it approved.
- No funds will be provided for travel within the city of Memphis, but registration fees for events held in Memphis are eligible for support.
- 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, or out-of-country travel must be approved by the UofM President.
- For more detailed guidelines and policy, see the UL Professional Development Policy (www.memphis.edu/libraries/about/policies/ul.professional.development.policy.pdf) and UofM Travel Policy BF4001 (www.policies.memphis.edu/UM1309.htm).

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 external funding (grants, etc.) will be used, submit the form to the Administration Department for the Executive Director's approval and processing.
 - c. 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.