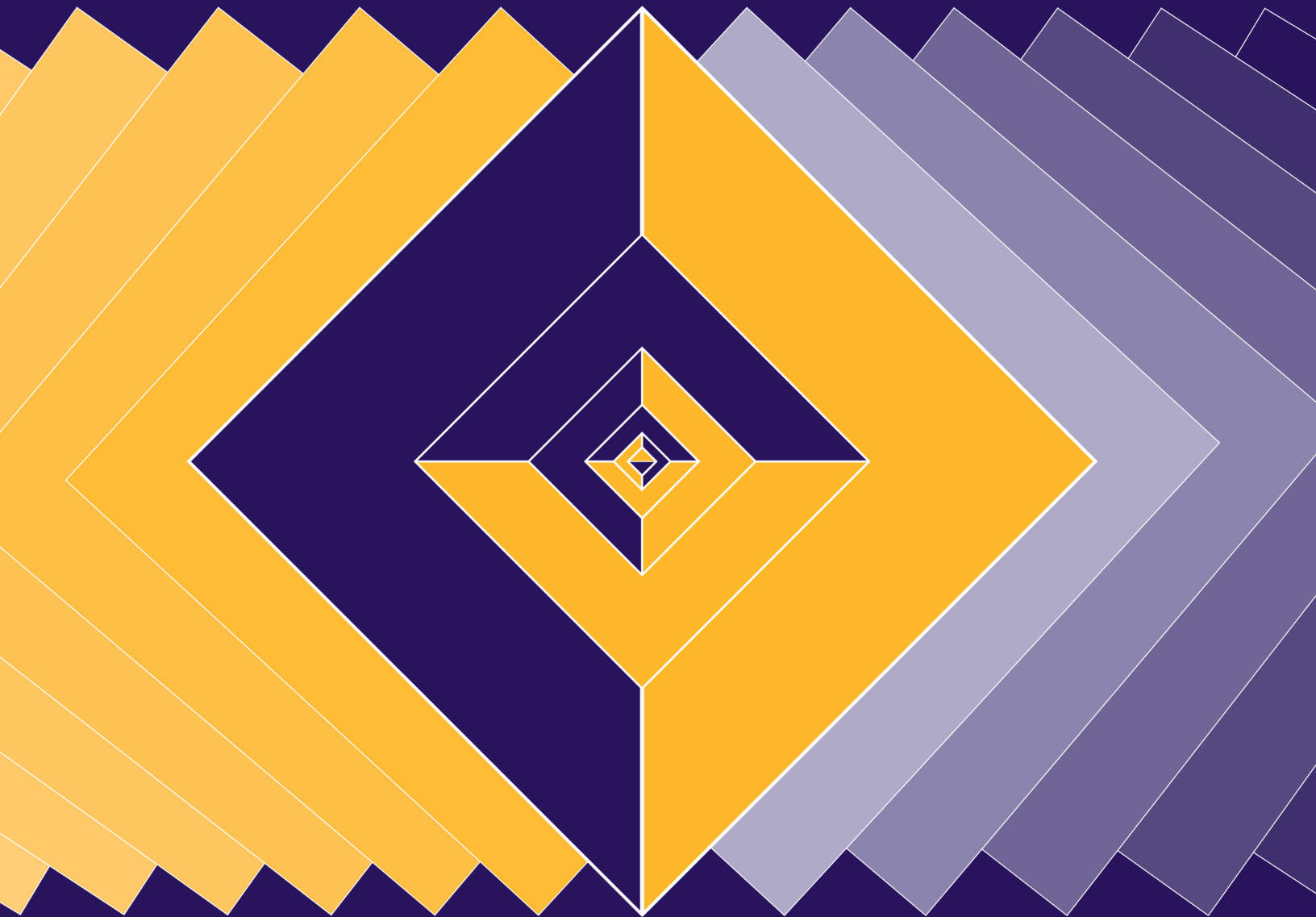




Kit 315

Leave and Professional Development Benefits
December 2009



ASSOCIATION OF RESEARCH LIBRARIES

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SURVEY RESULTS

EXECUTIVE SUMMARY

Introduction

This survey investigates two broad categories of benefit plans currently offered to professional library staff at ARL member libraries: leave time and support for professional development activities. Topics include benefits eligibility; holiday and intersession leave; plan designs and accrual rates for paid time off (PTO), vacation, and sick leave; and professional development leaves such as dedicated research time and sabbaticals. Other professional development topics include financial support and relief from duties for conference attendance; funding for professional association memberships; and financial and other support for college credit course work, internships, and certifications.

The survey addresses leave benefits and professional development support in one survey primarily because these benefits overlap and intermingle. For example, depending on the institution, time spent at annual conferences may be treated as vacation or some other leave, or as part of a research time plan. Because the benefits overlap it would be difficult to assess leave plans or professional development support practices without the comprehensive view afforded by data from both categories.

While it is likely that the benefits within the scope of this survey are offered to library employees beyond librarians, they are most commonly afforded to librarians. Since the variance in the extent to which these benefits are offered to other categories of employees might make the responses to the survey more difficult to interpret, the focus of the survey is on librarians, though respondents could consider other staff who are eligible for the same benefits in developing their responses.

The survey was distributed to the 123 ARL member libraries in June 2009. Seventy-three libraries completed the survey by the deadline of August 4 for a 59% response rate.

Full-time Status and Benefits Eligibility

The survey began by asking how many hours per week a librarian must work to be considered full-time and how many to qualify for leave benefits. The most common requirement for full-time status is 40 hours of work per week (63 % of respondents). Seventy-seven percent require that librarians work 37.5 or more hours per week and 90% at least 35 hours per week to be considered a full-time employee. Only seven respondents give full-time status to those who work fewer than 35 hours per week.

In all but six cases librarians must work at least half of the full-time requirement to be eligible for benefits. The most common requirement for benefits eligibility is 20 hours of work per week (34 respondents or 54%). Twenty-two percent require service of 30 or more hours per week and 10 percent of those require 40 hours per week for benefits eligibility.

Hours per Week	Range	Mean	Median
To be considered full-time	26 – 40	37.9	40
To qualify for leave benefits	1 – 40	22.6	20

Holiday and Intersession Leave

The survey next asked how many days of holiday leave are awarded each year and whether there is paid leave

for intersession breaks. All but one of the 67 responding institutions reported offering designated holiday leave. The most common response was ten days of holiday leave per year (20 responses or 30%). Seventeen respondents (25%) award seven to nine holidays. The other 29 respondents (43%) award from 11 to a maximum of 19 holidays per year.

Intersession leave is much less common. Fifty-five of the responding institutions (76%) offer no designated intersession leave. Fifteen of the 17 institutions that do have intersession leave offer one to seven days in addition to holidays. The other two institutions (who did not report holiday leave) offer 4 or 12 intersession days. These extra days fall predominantly during the winter closure periods (Christmas to New Years day) and not typically between other semesters.

Number of Days	Range	Mean	Median
Holidays	0 – 19	10.7	10
Intersession Leave	0 – 12	1.0	0
Combined Holiday and Intersession Leave	7 – 19	11.7	12

Leave Accrual

The survey asked whether the library had a Paid Time Off (PTO) leave plan (that combines vacation, sick, and personal leave into a single bank of days for employee paid time off) or a leave plan with separate vacation and/or personal leave and sick leave. It also asked whether there is one accrual rate for leave or multiple rates.

Paid Time Off (PTO)

Only two respondents (3%) reported having a Paid Time Off (PTO) leave plan. One of these has one accrual rate and the other has two. At the first institution librarians are awarded 168 hours a year of combined leave time. At the second institution librarians are awarded 21 days of leave in their first year of employment and one additional day each year of employment up to a maximum of 26 days.

Vacation and Sick Leave

The other 65 respondents (97%) reported having separate leave plans for vacation and/or personal leave and

sick leave. For vacation leave, 48 respondents have one accrual rate (74%) and 17 have multiple rates (26%). For sick leave, 57 respondents have one accrual rate (89%) and seven have multiple rates (11%).

One Accrual Rate

At the institutions with one accrual rate the number of vacation/personal leave hours accrued annually ranges from 96 to 232 with a mean of 180.87 and a median of 179. The most frequent responses were 192 hours (14 responses or 29%) and 176 hours (12 responses or 25%).

The number of sick leave hours accrued ranges from 54 to 1056 with a mean of 189.44. The median, 96 hours, was also the most frequent response (23 or 40%).

Number of Days	Range	Mean	Median
Vacation and/or Personal Leave	96 – 232	108.87	179
Sick Leave	54 – 1056	189.44	96

Multiple Accrual Rates

At the institutions with multiple accrual rates the number of rates for vacation/personal leave ranges from 2 to 9; two or three rates are the most common. For all but one respondent the criteria for each level are years of employment. The other institution has different rates for those with administrative and non-administrative assignments. There is a great deal of difference between the number of years of service required for each level and the number of hours accrued at each level. The table on page 24 provides the detailed responses.

The number of rates for sick leave is smaller, ranging from two to five. As with vacation leave, the criteria for each level are mostly years of employment. The table on page 25 provides the detailed responses.

Number of Ranges	Range	Mean	Median
Vacation and/or Personal Leave	2 – 9	4.4	3
Sick Leave	2 – 5	3.6	4

Leave Balances and Cash out

The survey asked how much leave could be accrued and carried forward, how much could be cashed out at termination of employment, and what were the eligibility requirements for cash out. All but six of the responding institutions (91%) allow some cash out of accrued vacation/personal leave, but only 17 (28%) permit cash outs of some amount of sick leave. The maximum balances, maximum cash out, and eligibility for cash out of vacation/personal leave varied widely among respondents as seen in the table on page 26. For sick leave, most respondents have no cap on the maximum balance that can accrue, though the amount of cash out and eligibility criteria vary considerably. Interestingly, the respondent's comments indicate that some portion of institutions permit librarians to apply sick leave balance towards qualifying service for retirement benefits.

Sabbatical and Professional Development Leave

At the majority of responding institutions (52 or 73%) librarians do not receive scheduled or dedicated research time as part of their regular assignment. At the 19 institutions that give such leave there is significant variance in the amount of full time equivalency (FTE) that is scheduled or dedicated to research, but the most commonly reported amount is 10 percent of FTE.

On the other hand, 62 institutions (87%) reported that librarians may apply for sabbaticals or professional development leaves. Respondents described a wide variety of leave durations. The majority (56%) use months as the basis of their leave duration; others are semester based. The most common durations for sabbaticals or professional development leaves are depicted in the following table.

Leave Duration	Responses
6 months or 12 months	12
1 year	9
1 semester or 2 semesters	6
6 months	4

The majority of respondents (53 or 77%) indicated that librarians on sabbatical or professional development leave continue to receive some level of salary;

45% pay the full salary. Respondent's comments convey that a wide variety of compensation designs are employed for sabbatical leaves. The most common feature is multiple levels of compensation based on percentages of the librarian's annual salary and with longer leave duration coupled with a lower percentage of salary. The most typical examples are 1 semester or 6 months at full pay, with a reduction to half salary for leaves with a duration of 12 months.

Other designs include leave with varying percentages of compensation based upon the librarian's length of service. In one example, after four years of service a librarian could take a 12 month leave at 60% of annual salary or 6 months at 75% or 8 months at 75%. After six years of service, a librarian could take a 12 month leave at 80% of salary or 6 months leave at 90%.

Leave for Conference Attendance

Only 10% of respondents (7 of 70) reported that librarians are required to use personal, vacation, or other leave to attend professional conferences that are primarily for their own personal professional development. (For the purposes of this survey, "personal professional development travel" does not include travel where the employee is conducting business on behalf of the library.) The respondents' comments indicate that a significant portion of this leave is from plans designated for professional development and not vacation or personal leave plans. Accordingly, institutional support for librarian attendance is considerable.

Financial Support for Conference Registration and Travel

Ninety-two percent of the responding institutions report some financial support for conference registration and/or travel and accommodations for conferences that librarians attend primarily for their own personal professional development. While only eight (11%) pay full registration and full travel expenses, half of the respondents pay at least part of the registration and travel costs. Only six respondents (8%) offer no financial support.

The respondents' comments show a wide variety of methods for establishing the amount of funding.

Many report that decisions are made by a staff committee. The allocation of a set annual allowance per librarian to be used for conferences or other professional development opportunities is prevalent; reported amounts range from \$300 to \$2,000. A variation on this method is the allocation of a set amount for librarians with more than one funding level based on tenure, permanent status, or rank. For example, one library provides \$1000 per year for non-permanent (non-tenured) librarians and \$800 per year for other librarians. Another method is to pay a set percentage of conference expenses. Percentages reported include 80 and 90 percent. The comments also indicate that the level of participation by the librarian at the conference is a common determinant of the amount of funding.

Personal Memberships for Professional Associations

Only 7% of respondents reported that their library pays or reimburses librarians for personal memberships to professional associations such as the American Library Association. Of those five, the comments indicate that librarians receive professional development allowances under a formal plan and may use those funds for a variety of purposes including personal memberships to relevant professional associations. Among those who don't pay, a number reported that payment or reimbursement for personal memberships to professional associations was prohibited by a state regulation or institutional policy.

Financial Support for College Credit Courses

The survey asked whether the library covered any expenses for college credit courses that are either job related or for personal development. The majority of respondents provide no financial support either for registration or books, materials, and equipment regardless of whether the course is job related or for personal development. Fifty-one percent of the respondents provide no financial support for registration expenses for either job-related or personal development credit courses. Seventy-one percent provide no support for books, materials, and equipment.

Just under half provide at least partial support for registration for job-related courses, but fewer than a third do so for personal development classes. Only 15

provide any support for books, materials, and equipment for job-related courses and only four of these cover books for personal development courses.

[The authors note that the amount of financial support for both categories of coursework may not include institution support beyond the libraries (at the university level, for example) and suspect there is more financial support in many instances than reported here.]

Thirteen institutions (23%) require job-related courses to be taken at the home institution; 12 (26%) require personal development courses to be taken at the home institution. Ten of these institutions cover expenses for these courses.

In the majority of cases (42 responses or 62%) time spent to attend job-related courses is treated as time worked, though a significant number of respondents indicated that the employee uses vacation/personal time or makes up the time. Only nine of the responding institutions (14%) treat time spent to attend personal development courses as time worked. In the majority of cases the employee uses vacation/personal time or makes up the time spent on these courses.

The maximum number of credit hours that librarians may take per session for courses that are either job related or for the librarian's own personal development is quite similar. In either case the minimum number reported is three and the maximum is "no limit." For those respondents who specified a number, the mean is about 6.5 and the median is 6.

[See the tables on page 15 for a detailed comparison of institutional support for job-related and personal development college credit courses.]

Financial Support for Internships

The survey also asked whether the library covered any expenses for internships that are either job related or for personal development. As with courses, the majority of respondents (39 or 60% for job-related internships; 56 or 89% for personal development) provide no financial support either for registration or books, materials, and equipment, or for travel regardless of whether the internship is job related or for personal development. Only 17 respondents (26%) cover any costs for job-related internships and only five of these cover costs for personal development internships.

[The authors note again that the amount of financial support for both categories of internships may not include institution support beyond the libraries and suspect there is more financial support in many instances than reported here.]

Only three institutions require that internships be taken at the home institution and all three of these cover at least some of the costs of the internship.

Sixteen respondents (41%) report that time spent on job-related internships is treated as time worked and only two (5%) treat time spent on personal development internships in this manner. There is some flexibility in work scheduling for internships that are either job-related or for personal development and the employee is either allowed to make up the time or use vacation/personal leave.

In most cases, internships may be six to eight credit hours per session, though a few respondents report there is no limit.

[See the tables on page 16 for a detailed comparison of institutional support for job-related and personal development internships.]

Comparison of Courses and Internships

A comparison of how the responding institutions treat the librarian's time away from his or her normal duties in order to attend job-related college credit courses versus to complete a job-related internship shows course time is more likely to be counted as work time and employees are more likely to have to use vacation/personal leave for internships. Eight institutions don't allow librarians to participate in job-related internships during normal assignment hours versus three that don't allow attendance at job-related courses.

A comparison of how the responding institutions treat the librarian's time away from his or her normal duties in order to attend college credit courses for personal development versus to complete internships shows that most either require the librarian to use vacation/personal leave or to make up the time away. A slightly larger number of institutions don't allow participation in either personal development courses (12) or internships (11) during normal assignment hours.

[See the tables on page 17 for a detailed comparison of the institutional treatment of time away from normal duties for credit courses and internships.]

Professional Certification Exams

The majority of responding libraries do not cover expenses for professional certification exams. Sixteen (24%) libraries do provide financial support, but only for job-related certifications. In most cases, the librarian's time away from his or her normal duties in order to prepare for or take professional certification exams is treated the same as personal development courses and internships; the librarian is required to use vacation/personal leave or to make up the time away.

Other Leave or Professional Development Benefits

Thirty-nine respondents (57%) reported that their institutions offer leave and professional development benefits beyond those described above. For example, a number mentioned that librarians are eligible for personal unpaid leave, flexible scheduling, and telework. Others receive tuition reimbursement for noncredit courses or travel support for job-related committee work.

Conclusion

The survey results indicated there is considerable variation in the leave programs at ARL member libraries. Relatively few use a Paid Time Off leave program or offer intersession leave. While there is a wide variation in leave balance and cash out policies, the total paid time off for librarians is considerable.

There is also considerable support for research and professional development activities, though programs for supporting professional development show wide variation in design and procedures. While relatively few libraries provide a regularly scheduled percentage of assignment time off, most offer some options for time away for research and professional development activities. Ninety percent forgive time away for conferences. Eighty-five percent offer some financial support for conferences, though there is little support for professional association memberships. There is mixed financial support for college credit and internships and little for certification, and there are a variety of methods used to determine funding. Nonetheless, there is significant support in allowance for flexible scheduling.

From this survey of typical leave program components (such as accrual rates, intersession leave, and cash out policies) and research and professional development program components (such as support for travel to conferences and participation in college credit courses), it is clear that ARL member libraries are able to offer a wide variety of leave and professional benefit options to their librarians. While leave benefits often are mandated by the parent institution, many times portions of research and professional development benefits are left to the discretion of library administration. This allows a certain flexibility for administrators to support a wide variety of training opportunities for their professional staff.

The depth and breadth of comments provided by the survey respondents, particularly in the areas of sabbaticals and “other” benefits, was remarkable. The authors strongly encourage readers of this SPEC Kit to carefully review the comments as they complement the statistics and together provide a much richer picture of the varied benefit options available to librarians. Finally, a thorough reading of the representative documents section is recommended, as the authors were deliberate in their selection of leave and professional development policies and procedures that represented a wide variety of practices and innovative designs.

Comparison of Job-related and Personal Development College Credit Courses

Expenses Covered

	Job Related N=72		Personal Development N=72	
	Responses	%	Responses	%
Full Registration	2	3%	2	3%
Full Registration, Full Books, etc.	6	8%	1	1%
Full Registration, Part Books, etc.	2	3%	—	—
Full Registration, No Books, etc.	6	8%	6	8%
Part Registration	3	4%	—	—
Part Registration, Part Books, etc.	6	8%	3	4%
Part Registration, No Books, etc.	10	14%	9	13%
No Registration	1	1%	—	—
No Registration, Full Books, etc.	1	1%	—	—
No Registration, No Books, etc.	35	49%	51	71%

Treatment of Time Away from Normal Duties

	Job Related N=68		Personal Development N=63	
	Responses	%	Responses	%
Counted as time worked	42	62%	9	14%
Employee uses personal time, e.g., vacation	24	35%	37	59%
Employee is allowed to make up the time	32	47%	37	59%
Not allowed during normal assignment hours	3	4%	12	19%
Other response	3	4%	1	2%

Maximum Number of Credit Hours Allowed per Session

	Job Related N=21			Personal Development N=19		
	Range	Mean	Median	Range	Mean	Median
Number of credit hours	3 – 16	6.7	6	3 – 16	6.3	6

Comparison of Job-related and Personal Development Internships

Expenses Covered

	Job Related N=65		Personal Development N=63	
	Responses	%	Responses	%
Full Registration, Full Travel	1	2%	—	—
Full Registration, Full Books, etc., Full Travel	5	8%	—	—
Full Registration, Part Books, etc., Part Travel	1	2%	—	—
Full Registration, No Books, etc., Full Travel	1	2%	—	—
Full Registration, No Books, etc., No Travel	1	2%	1	2%
Part Registration, Part Books, etc., Part Travel	5	8%	—	—
Part Registration, Part Books, etc., No Travel	—	—	1	2%
Part Registration, No Books, etc., Part Travel	1	2%	1	2%
Part Registration, No Books, etc., No Travel	2	3%	2	3%
No Registration, No Books, etc., No Travel	39	60%	56	89%
Other Response	9	14%	2	3%

Treatment of Time Away from Normal Duties

	Job Related N=39		Personal Development N=37	
	Responses	%	Responses	%
Counted as time worked	16	41%	2	5%
Employee uses personal time, e.g., vacation	17	44%	24	65%
Employee is allowed to make up the time	14	36%	21	54%
Not allowed during normal assignment hours	8	21%	11	30%
Other response	2	5%	—	—

Maximum Number of Credit Hours Allowed per Session

	Job Related N=7			Personal Development N=6		
	Range	Mean	Median	Range	Mean	Median
Number of credit hours	6 – 8	6.6	6	6 – 8	6.8	6.5

Comparison of Treatment of Time Away from Normal Duties for College Credit Courses and Internships

Job Related

	Courses N=68		Internships N=39	
	Responses	%	Responses	%
Counted as time worked	42	62%	16	41%
Employee uses personal time, e.g., vacation	24	35%	17	44%
Employee is allowed to make up the time	32	47%	14	36%
Not allowed during normal assignment hours	3	4%	8	21%
Other response	3	4%	2	5%

Personal Development

	Courses N=63		Internships N=37	
	Responses	%	Responses	%
Counted as time worked	9	14%	2	5%
Employee uses personal time, e.g., vacation	37	59%	24	65%
Employee is allowed to make up the time	37	59%	21	54%
Not allowed during normal assignment hours	12	19%	11	30%
Other response	1	2%	—	—

SURVEY QUESTIONS AND RESPONSES

The SPEC survey on Leave and Professional Development Benefits was designed by **Cathleen Martyniak**, Chair, Preservation Department, and **Brian Keith**, Assistant Dean, Human and Financial Resources, University of Florida. These results are based on data submitted by 73 of the 123 ARL member libraries (59%) by the deadline of August 4, 2009. The survey's introductory text and questions are reproduced below, followed by the response data and selected comments from the respondents.

This survey is for the human resource officer or other senior administrator responsible for policy decisions about the various leave and professional development benefits available to librarians. The benefits covered in this survey include sick, vacation, and holiday leave, and leave and financial support for professional development, employee education and training, and internships. The benefits not considered in this survey, but well represented in other surveys, include retirement and insurance plans. In determining the scope of this survey, the authors wanted to develop an understanding of the less researched and more varied plans currently offered to professional library staff and benefits over which library administrators would typically have some plan design authority. These benefits represent an area ripe for exploration.

While it is likely that the benefits within the scope of this survey are offered to librarians and other library employees, they will be most commonly afforded to librarians. Since the variance in the extent to which the benefits are offered to other categories of employees might make the responses to the survey more difficult to interpret, the survey authors have opted to narrow the focus of the survey to librarians (though respondents may include other staff who are eligible for the same benefits).

Results of this survey should help provide a better understanding of the prevalence of these leave benefits and identify typical plan components and design.

BACKGROUND

1. Please indicate the number of hours per week librarians must work to be considered full-time and to qualify for leave benefits. N=72

	N	Minimum	Maximum	Mean	Median	Std Dev
To be considered full-time	70	26	40	37.9	40	3.49
To qualify for leave benefits	63	1	40	22.6	20	7.91

Hours worked to be considered full-time	Number of Responses	Hours worked to qualify for benefits	Number of Responses
26	2	1	1
30	4	8	1
32	1	10	1
35	9	16	1
37.5	10	17.50	5
40	44	18.75	3
		19	1
		20	34
		26	2
		30	5
		32	1
		35	1
		37.50	1
		40	6

Hours worked to be considered full-time	N	Hours worked to qualify for benefits	N	Comments
26	2	26	2	AAUP-represented librarians appointed at 65% FTE or greater are considered full-time. If their appointment is between 50% and 64% FTE, they are considered Adjunct Librarians and receive part-time benefits.
30	4	17.5	1	
		30	3	
32	1	20	1	

Hours worked to be considered full-time	N	Hours worked to qualify for benefits	N	Comments
35	9	17.5	3	
		20	3	Leave benefits consist of FMLA and unpaid personal leave of absence.
		35	1	
		Other	2	Covering professional leave for part time librarians has never been raised as an issue. We only have 1 part time librarian and I don't know if she has ever requested professional leave.
				For part-time, benefits are pro-rated.
37.5	10	18.75	3	
		20	3	The library has no part-time professional staff.
		30	1	
		37.5	1	Professional employees are salaried and as such hours are not counted.
		Other	2	Librarians are faculty and hold 12-month continuing fiscal appointments. Only faculty who hold 12-month continuing fiscal appointments are eligible to earn or accrue vacation benefits.
				It depends on salary level. The 2008 minimum was \$ 12,120.
40	44	1	1	Leave accrual rates are proportional to the percentage of 40 hours per week.
		8	1	
		10	1	Insurances are prorated on greater than 50% or less than 50%, leave is prorated based on appointment percentage.
		16	1	
		17.5	1	
		19	1	
		20	27	See 40/20 comments below.
		30	1	
		32	1	University policy states that at 32 hours an employee can qualify for benefits. However, the library does not have any .75 FTE employees.
		40	6	The university allows benefits at 75%, however, we only hire full time employees into "regular" (not temporary) positions.
		Other	3	Benefit based on FTE.
				Staff members are eligible for leave benefits based upon the type and length of the appointment rather than the number of hours in the work schedule.

40/20 Comments

A benefits-eligible employee requires working 40 hours or more per week (.50 FTE) and is expected to be active for more than six months.

Faculty must be employed at .50 FTE or more and be on a 12-month or longer contract in order to be eligible for paid leave.

If staff has been in government 15 years or more, can work 10 hours per week to qualify for leave benefits.

Leave accrual is pro-rated for reduced FTE.

Leave is pro-rated according to contract hours.

Paid leave benefits are prorated by FTE for part-time faculty.

People who work 20 hours per week earn 1/2 leave benefits.

This applies to both academic and staff employees.

To be eligible for leave (sick and annual leave), employee must work at least .50.

Vacation and sick leave benefits are available for salaried employees who work 20 or more hours per week.

Other Comments

Administration and supervisor must approve leave time.

Librarians are faculty and do not work a 40-hour week. Librarians are appointed on an annual year basis (12 months) or academic year basis (August 16 to May 15). Both are eligible for leave.

HOLIDAY AND INTERSESSION LEAVE

2. How many days of holiday leave are awarded each year? N=67

Minimum	Maximum	Mean	Median	Std Dev
0	19	10.7	10	2.63

Number of Days	Number of Responses
0	1
7	4
8	5
9	8
10	20
11	5
12	8
13	9

Number of Days	Number of Responses
13.5	1
14	3
15	1
16	1
19	1

Comments

88 hours holiday leave for 1.0 FTE; hours are pro-rated for reduced FTE.

All University Holidays include the following: January-New Year's Day and MLK Day. May-Memorial Day. July-Independence Day. September-Labor Day. November-Veteran's Day and Thanksgiving (2 days). December-Christmas (2 days). Total paid holidays = 10 (or 80 hours).

Eight regular holidays are: New Year's Day; Martin Luther King Day; Memorial Day; Independence Day; Labor Day; Thanksgiving Day, Friday following Thanksgiving; Christmas Day. Election Day is observed as a holiday in even numbered years.

Holiday leave days vary, but usually between 12 and 15.

Holiday leave is prorated for part-time faculty with greater than .50 FTE.

Holidays are determined by our state legislature annually. Up to 17 days per year are allowable.

Holidays include 9 days plus 2 personal holidays that are accrued with vacation and are included in the 16 hours per month vacation time.

Includes 11 statutory holidays and 3 additional days during the Christmas break period.

Library staff on compressed schedules will be entitled holiday hours equal to the same number of hours in their normal workday (i.e., 9 or 10 hours).

Neither librarians nor any other university staff receive holiday leave.

Nine holidays are awarded plus two floating holidays.

On years containing a presidential election, that day is an additional holiday.

Our employees are employed by the state of Texas and earn the same number of holidays as all other state employees.

Pro-rated based on FTE (full-time equivalency).

The number of hours fluctuates depending on a person's work week.

The University observes the following holidays: * New Year's Day, January 1 * Martin Luther King Jr. Day, 3rd Monday in January * President's Day, 3rd Monday in February (movable holiday usually observed contiguous with Christmas Day) * Memorial Day, last Monday in May * Independence Day, July 4 * Labor Day, 1st Monday in September * Columbus Day, 2nd Monday in October (movable holiday usually observed the day after Thanksgiving) * Veterans' Day, November 11 * Thanksgiving Day, 4th Thursday of November * Christmas Day, December 25.

This includes the time between Christmas and New Year when the Libraries are closed.

This may change under a pending proposal that may require all university employees to take 21 furlough days per year; the furlough days may include some holidays.

University calendar provides for ten paid holidays plus three discretionary days to be awarded if an employee remains employed during the months of Feb, March and April.

We allow our employees 9 days for statutory holidays which are mandatory in Canada but we've never used the term "holiday leave."

3. How many days of paid leave are provided per year for intersession breaks? N=72

Minimum	Maximum	Mean	Median	Std Dev
0	12	1.0	0	2.31

Number of Days	Number of Responses
0	55
1	2
4	4
4 to 5	3
5	4
7	2
12	1
Varies	1

Comments

4 to 5: Depends upon the number of working days between Christmas and New Year.

4 to 5: Only applies between Fall and Winter term - actual number of days of paid leave is dependent upon dates.

4 to 5: Special Winter Vacation Policy: The Vice President for Human Resources announces the special winter vacation dates each year and occasionally this includes the day before Christmas or the day after New Year's in addition to the weekdays in between.

All staff members receive one paid "Governor's Day" between Christmas and New Year.

Brand new practice this year of the university closing longer over the winter holiday break. "Employees will receive paid leave for Dec. 28, 29, 30 and 31. The paid leave is in addition to the paid holidays of Dec. 24, 25 and Jan. 1." No other paid leave during any other intersession.

Campus does not shut down for intersession, but we do have holiday leave around Christmas. The library does stay open during part of this time.

However, it is not uncommon for administration to grant "special holiday closings" of 1 to 2 days surrounding Christmas and New Year's. Announcements of these closings are generally made 30-60 days in advance and do not count as part of the 12 paid holidays mentioned above nor are they charged to vacation.

Intersession hours between December and January are considered holidays and are included above.

Libraries' faculty are informally granted an extra week's leave at the winter intersession only.

Libraries' faculty are on annual, 12-month appointments, so they work through all intersession breaks, with the exception of all university holidays.

Must use accrued vacation leave.

Neither librarians nor any other university staff receive intersession leave.

Not applicable for 12-month employees.

Our librarians are paid on a 12-month cycle and are expected to work during breaks.

The five days are included in the 12 days of holiday leave reported above.

The library does not close during intersession breaks.

The university does not provide paid leave during intersession.

The University Libraries are open during intersession breaks.

The university closes between Christmas and New Year's. Most years this provides employees an additional 7 days of holiday pay. In a seven-year cycle, there are two years when employees receive 6 days of holiday pay between Christmas and New Year's.

These "special holidays" are the weekdays falling between Christmas Day and New Year's Day.

This is at Christmas; no other leave is paid.

We have 12-month contracts. There are no intersessions here.

LEAVE ACCRUAL

4. If there is one accrual rate for librarians, please enter the hours accrued per year for each type of leave below. [For the purposes of this survey Paid Time Off (PTO) leave is part of a leave plan that combines vacation, sick, and personal leave into a single bank of days for employee paid time off.] N=67

One Accrual Rate

Paid Time Off hours per year N=1

Number of hours: 168

Vacation and/or Personal leave hours per year N=48

Minimum	Maximum	Mean	Median	Std Dev
96	232	180.87	179	19.57

Number of Hours	Number of Responses
<150	1
150–159	1
160–169	8
170–179	14
180–189	4
190–199	14
200	3
>200	3

Comments

After six months of employment, 22 days per year; 176 hours or 1.83 days/month for each month worked.

15 hours per year of any purpose time (0-9 years); 22.5 hours per year of any purpose time (10+ yrs.)

Sick leave hours per year N=57

Minimum	Maximum	Mean	Median	Std Dev
54	1056	189.44	96	261.99

Number of Hours	Number of Responses
<90	3
90–99	23
100–119	3
120–129	6
130–139	1
140–149	2
150–159	0
160–169	2
170–179	1
180–189	1
190–199	0
200	1
>200	4
Other	10

“Other” Comments

As many as needed (2 responses)

No cap/limit (4 responses)

Unspecified

6 months of salary continuation

600. Not an annual amount; considered the maximum of hours of sick time before a long term disability plan kicks in.

There is no formal method of sick leave accrual or accounting for members of the Administrative and Sponsored Research staffs. A reasonable number of justifiable absences are paid in full.

- 5. If there are multiple accrual rates for librarians, please enter the number of levels, the criteria for each level, and the hours accrued per year for **up to four levels**. N=18

Multiple Accrual Rates

Paid Time Off N=1

Number of levels (e.g., 2, 4): 2

Criteria for each level (e.g., years of employment): Years of employment

Level 1 hours per year: First year of employment - 21 days

Level 2 hours per year: 1 day each year completed to a maximum of 26 day

Vacation and/or Personal Leave N=17

Number of levels	2	3	4	5	7	9
Responses	4	5	2	2	1	3

Criteria for each level:

Years of employment (16 responses)

Administrative assignment vs. Non-administrative assignment (11 month)

Number of hours:

	Level 1 hours	Level 2 hours	Level 3 hours	Level 4 hours
2 Levels	25 years of service or less: 16 hours/month (192 hours/year)	26 years of service or more: 18 hours/month (216 hours/year)		
	154	189		
	<20 years of service : 23 vacation days and 3 personal days per year	20 or more years of service: 28 vacation days and 3 personal days per year		
	Administrative = 176.04 hours/year	Non-administrative = 0 hours/year. Receive time off during fiscal year for 12th month.		
3 Levels	Accrue 120 (15 days) for first year of employment	Accrue 160 (20 days) for each year of employment after first year	Employees with 10+ years of service credited an extra 5 vacation days beginning on each anniversary of 10, 15, 20, 25, 30, etc. years of service	
	0–3 years earns 104 hours of annual leave per year	3–15 years earns 160 hours of annual leave per year	15+ years earns 208 hours of annual leave per year	
	1 through 17 years - 200 hours	18 through 22 years - 216 hours	23 and over - 240 hours	(These numbers are based on full-time employee.)
	0–3 years: 4 x 26= 104	3–15 years: 6 x 26= 156	15+ years: 8 x 26= 208	
	Fewer than 3 years of service, earn 4 hours	At least 3 but not less than 15 years, earn 6 hours	15 years or more, earn 8 hours	
4	120	176	216	240
	187.5 (25 days per year)	195 (26 days per year)	202.5 (27 days per year)	210 (28 days per year)
5 Levels	1.25 per month	1.335 per month	1.5 per month	1.667 per month and there is 1.75 for 7 or more years
	105	119	133	147
7	140 hours (See comment 1 below.)	175 hours	210 hours	210 hours + 35 hours (one time supplemental)
9 Levels	96	108	120	132
	<2 years----8 hours per month	>2 <5 years---9 hours per month	>5 <10 years---10 hours per month	>10 <15, add 2 hours per month, max 21 hours per month
	8/month - 96 hours annually (See comment 2 below.)	9/month - 108 hours annually	10/month - 120 hours annually	11/month - 135 hours annually

Comments

- 1. Years of employment: 1, 5, 8, 13, 18, 23, 33
- 2. Years of employment: 0–2; 2–5; 5–10; 10–15; 15–20; 20–25; 25–30; 30–35; 35+

Sick Leave N=7

Number of levels	2	3	4	5
Responses	2	1	2	2

Criteria for each level		Level 1 hours	Level 2 hours	Level 3 hours	Level 4 hours
2 Levels	Up to 6 months leave; long term disability leave	840 hours (6 months)	Long term disability leave		
		Some faculty under plan with 1040 hours of sick leave	Some faculty 25 days of sick leave per year		
3	Years of employment: 0–3, 3–15, 15	104	104	104	
4 Levels	Full Time	4 hours of leave for each pay period			
	Years of employment	80 during first year	308 during second year	616 during third year	924 after 3 years
5 Levels	Years of employment	1.25 per month for 0–1 year of employment	1.335 per month for 2 years of service	1.5 per month for between 3–5 years of service	1.667 per month for 6 years of service and 1.75 for 7 or more
	Years of employment	1st year: 75	2nd & 3rd year: 150	4th & 5th year: 315	6th –10th year: 487.5 at 100% pay 487.5 at 60% pay

Leave Balances and Cash out

6. For each type of leave below please enter the following information.

Maximum Balance: the number of hours of leave that can be accrued/awarded and carried forward. If there is no limit, enter "no cap."

Maximum Cash out upon termination: the number of hours of leave that can be cashed out. If there is no cash out limit, enter "no cap." If no cash out is permitted, enter 0.

Cash out Eligibility: Describe cash out eligibility requirements, if any (e.g., minimum of 10 years of service).

Paid Time Off N=2

Maximum Balance	Maximum Cash out	Cash out Eligibility
168	168	Effective after 6 months of service
288	no cap	Upon separation or retirement

Vacation and/or Personal Leave N=63

Cash Out N=57

Maximum Balance	Maximum Cash out	Cash out Eligibility
0	176	N/A
22	22	N/A
40	30	
40	30	30
165	165	1 Year of service
168	168	Successful completion of introductory period (typically 4 months)
173	No cap	After 6 months of service can cash out
240	240	Up to 240 hours paid upon separation
240	448	None
247.5	247.5	Only paid for unused accrued time to date/ minimum one year of service
256	256	N/A
262.5	262.5	None
280	280	
288	288	288
352	352	Minimum of 2 years of service
352.08	176.04	
360	360	No requirements
384	384	
384	384	
384	384	No minimum number of years of service required
384	384	No requirements
384	384 (Really a pay out upon leaving)	Remaining balance upon leaving university
388	40	Minimum 10 years
400	All	Resignation or retirement
480	352	None
480	480	Resignation or retirement
532	784	Have actually accrued that many hours of unused vacation

Maximum Balance	Maximum Cash out	Cash out Eligibility
1 year's entitlement	Up to 1 year of accrued vacation	Upon termination
120 hours/year up to 720 hours max.	720 hours max	N/A
168 Hours	168 Hours	None
2 weeks vacation can be banked and carried over to succeeding year only		
2 years vacation credit	2 years vacation credit	No requirements
23 or 28 depending on years of service	23 or 28 depending on years of service	
240 hours for all but executive level staff	No cap	Any balance at time of separation from federal service
240 hours of annual leave	240 hours of annual leave	No requirements
240 hours (0–25 years service); 264 hours (starting 26th year)	Same	
240; Hours in excess of 240 on 12/31 transfer to sick leave balance	240	2 years' service minimum for unreduced cash payout
260 hours	180 hours	
264 hours	Current rate of pay up to 176 hours	Current rate of pay up to 176 hours
264 hours (pro-rated based on fte)	176 hours (pro-rated based on fte)	Benefits-eligible (.50 FTE with six months continuous service.)
308 or 378 depending on length of employment	Either 154 or 189 depending on length of employment	Maximum of either 154 or 189
320 hours	173.33	N/A
352 (plus 8 hour personal holiday)	352 (Personal holiday may not be paid in cash)	Permanent, tenured or tenure-track appointments only
352 hours	352 hours	End of appointment
384 hours	384 hours	Upon termination of employment (resignation or retirement)
384 hours	No cap	N/A
40 days	40 days	None for vacation; personal time is not paid out
40 days + 5 day 5th week vacation credit	40 days + 5 day 5th week vacation credit	None
44 days	44 days	None
64 days	64 days	
66 days or 528 hours	All unused vacation hours	After 6 months of employment, all unused hours

Maximum Balance	Maximum Cash out	Cash out Eligibility
Annual accrual + 2 week carryforward allowed	Annual accrual + 2 week carryforward allowed	Annual accrual + 2 week carryforward allowed
Based on years of employment	Based on how many days were already taken	Based on agreement with employer
Depends on years of service		Yes (FTE leaving get vacation pay if not going to another state agency.)
No max balance but not paid at full salary range		
Varies depending upon years of service	Employees are paid for all unused vacation	Must have been employed at least 6 months.
Zero	22	N/A

No Cash Out N=6

Sick Leave N=61

Cash Out N=17

Maximum Balance	Maximum Cash out	Cash out Eligibility
1500 hours	30,000	At least 500 sick leave hours (Eligibility: 1) State employee hired on or after 7/01/08, 2) Accumulated at least 500 hrs. or more at time of retirement, 3) Apply for retirement within 14 calendar days upon separation from university, 4) Apply for Accumulated Sick Leave benefit within 180 days from retirement.)
300 days or 2,400 hours	25% of balance to a maximum of 240 hours	Cash out paid only at retirement.
N/A	30,000	500–749 hours @ 25%; 750-999 @ 33%; 1000-1500 @ 50%
No Cap	Can be counted toward service credit for retirement purposes.	N/A
No cap	No cap	Lost at resignation; converted to service credit if retiring.
No cap	240 hours	Only upon retirement, 1/4 of sick leave balance
No cap	15 days	Retirement
No cap	0 unless hired prior to 12/97	Hires prior to 12/97: no minimum number of years of service required; after 12/97 no cash out.
No cap	2000	Must be at least 55 years of age and is considered a retirement benefit.
No cap	30 days	Must be 62 or older
No cap		25% of hours balance

Maximum Balance	Maximum Cash out	Cash out Eligibility
No cap	No cap, but cash out payment is one quarter of hours	Permanent, tenured or tenure-track appointments only, at time of retirement only. No payment made at resignation.
No limit	30 days (1/4 of accrual)	Retirement with 10 or more years of service
No maximum balance	Longevity 1 day per year at University	
None	480	10 year service requirement
None	Max of \$2000	Only with retirement, not resignation
Unlimited	One-fourth of balance to maximum of 30 days	Resignation or retirement after minimum 10 years service
	136 hours	Retirement only, and hired prior to 2004

No Cash Out N=44

Comments

Can be counted toward service credit for retirement purposes.

Employees enrolled in state pension plan may apply balance toward retirement in accordance with plan formula; ORP (Optional Retirement Plan) participants are not eligible for this provision.

No cash out, but upon retirement accumulated sick leave may be converted to retirement service credit (no limit).

No cash out; if retiring sick leave is added to your service time.

None, but it is used to defray the cost of a medigap policy.

Only upon death; sick leave up to 336 hours goes to estate.

Sick leave is not paid out, but may be transferred to another state agency upon separation.

LEAVE TIME FOR PROFESSIONAL DEVELOPMENT

7. Do librarians at your library routinely get scheduled or dedicated research time as part of their regular assignment? N=71

Yes	19	27%
No	52	73%

If yes, what percentage of FTE? N=14

Percentage	N
5% to 10%	1
5% to 20%	1
5% to 25%	1
6%	1
10%	5
12.5%	1
40%	1
Negotiable	1
Not fixed	1
Varies	1

8. May librarians at your library apply for sabbaticals or professional development leave? N=71

Yes	62	87%
No	9	13%

Please explain the duration of such leave.

1 semester @80% salary after 3 years; 1 semester @100% after 6 years; 2 semesters@80% after 6 years

1 semester at full pay or 2 semesters at half pay

1 semester of sabbatical leave after 6 semesters of full time service

1 year or 6 months

10 weeks of paid leave

6 months

6 months at full pay; 12 months at half pay

6 months leave

6 months or one year

After 4 years of service, 12 months duration or 6 months duration or 8 months duration. After 6 years of service, 12 months duration or 6 months or 8 months.

After 6 years of full-time service, upon being tenured, sabbatical leave of 1 year at half-pay or 6 months at full-pay.

Any library staff member may request a leave of absence, generally for a period up to one year.

As non-tenure faculty, librarians are eligible for "scholarly assignment off campus" for 6 or 12 months. Librarians may also receive professional development leave and "release time" for conference attendance (normally 3 to 5 days

depending upon conference/meeting).

At this point, no librarians have asked for sabbatical. However, it is possible.

Can apply for professional leave to attend conferences/workshops/training; usually 1 to 3 days.

Can apply for research leave.

Duration of professional development leave depends on purpose of leave.

Durations vary; maximum is one year.

I. Eligibility: Those who have been employed as full-time librarians with continuing appointment status for at least six consecutive years, and who have not had a development leave in the past six years. Leaves may begin in the seventh year of appointment or the seventh year following a prior leave. II. Options: Leaves may be for one semester (4 ½ months) at full salary or one academic year (9 months) at half salary. The leave period need not correspond with a particular semester of the academic calendar, but the leave period must be continuous.

Here the term "professional development leave" applies to the time that librarians use to attend conferences and training. These are short-term leaves (generally 1 to 5 days). We do not have sabbaticals or lengthy professional research leaves.

It depends on the research or project; maximum is 3 months full pay or 6 months half pay (which allows a longer absence while remaining in a benefits eligible status).

It depends on their research request. It can be from one week up to one year off.

Librarians are not eligible for sabbaticals but may request professional development leaves, which are considered on a case-by-case basis.

Librarians may also request time off under a more informal "Time Grant Program."

Librarians may apply for leaves for Professional Development activities only (not sabbaticals).

Librarians who are tenured faculty are eligible for sabbatical leave of one semester at half pay after a minimum of six semesters of service, or one semester at full pay to two semesters at half pay after a minimum of twelve semesters of service. Untenured library faculty members and librarians who are administrative/professional staff are not eligible for sabbatical leave.

Librarians with Continuing Appointment may apply for 6- or 12-month sabbaticals.

Maximum of one year.

Negotiate professional development/research leave time. Sabbaticals are for six months or one year.

No policies developed; professional leave is quite limited (e.g., work at home for 2 weeks).

No sabbaticals, but we do have some leaves of absences available. Educational, Scholarly Activity and Personal LOAs seem to be most applicable. Most are limited to one year in length.

No set limits. Individual requests are reviewed by a Study Leave Review Committee, which is advisory to the University Librarian.

Normally a semester. Permission may be granted for a longer period of time.

Not to exceed one year; may be renewed for a second year with written request to department head (dean of libraries).

One month of leave for every year of service to a maximum of six months for Academic Activity leave; two weeks of leave for every year of service to a maximum of eight weeks for Study leave. Both type of leaves are considered Professional leaves.

One-year sabbatical every seven years.

Option #1: 136 calendar days in length with full benefits and 100% of the Faculty member's salary. Option #2: 272 calendar days in length with full benefits and 50% of the Faculty member's salary. NOTE: sabbaticals are frozen this year campus-wide due to budget problems.

Policy allows for flexibility dependent upon a number of factors such as librarian's productivity, quality of work, attendance and overall performance; scope of project; department plans for coverage of absence, etc.

Professional development leave only; there is no limit. Decisions are based on nature of the request and operation considerations.

Professional Development Time: 174 hours per year; sabbaticals: 3 months to 1 year.

Professional leave is granted for 6 months or 12 months.

Sabbatical: either 1 semester or 1 year; Research: from 2 weeks to 2 months.

Sabbatical leave duration: 6 months or 12 months; Professional development leave: 24 days/fiscal year.

Sabbaticals are 6 months.

Sabbaticals are generally for four, eight, or twelve months, and may be requested once every seven years. There is no limit on professional development leave for work-related conferences and/or training, within reason.

Shorter term professional leave is 2 months of leave; you need to have been with the university for 2 years. Sabbatical is 5 1/2 months of leave; you need to have been with the university for 6 years. Both leaves are full pay.

Six months at full pay or one year at half pay

Six months if taken at one time. May take over the course of 12 months (taken every other month).

Six months of sabbatical at full pay or one year of sabbatical at half pay

Tenured faculty are eligible only after completing six years of service in the bargaining unit.

The duration of the sabbatical leave is determined by the years of service. Professional Development leave is granted upon request.

There is university sponsored development leave. The library allows up to 24 days per year for development leave.

Two months during the summer

Up to 22 days of research leave is available. Do not have access to sabbaticals.

Up to a total of eight months

Up to a year

Up to one year

Up to one year

Up to two quarters; if two quarters, one will normally be a summer quarter.

Varies by employee based on length and purpose of leave request.

Varies greatly, has been approved for one year.

9. Do librarians at your library receive pay for any part of sabbatical or professional development leave time? N=69

Yes, they are paid in full for this leave time	31	45%
Yes, they are partially paid for this leave time	12	17%
No, they are not paid for this leave time	16	23%
Other response	10	15%

Comments

Paid in Full

1 semester at full pay or 2 semesters at half pay.

100% for PDT, Sliding scale for pay of more than 3 months for sabbatical

100% or 80%; See above.

50% if on one-year sabbatical

Full pay for six-month sabbatical. Half pay for full calendar year sabbatical.

If approved, they are generally paid in full.

Librarians are paid when the time is approved as official or administrative leave.

Policy allows full salary to be paid if employee is on sabbatical for at least one semester or six months; otherwise employee receives three-fifths of normal salary.

Sabbatical: 1 semester at full pay or 1 year at half pay; Research: full pay

Sabbatical for up to 6 months: 100% Salary; Sabbatical for 6 to 12 months: 67% Salary

See previous answer. 100% pay for half year. 50% for full year. NOTE: sabbaticals are frozen this year campus-wide due to budget problems.

They receive full pay while on professional leave.

Partially Paid

80% of salary for both types of professional leave

After 4 years, 12 months @60% or 6 months@ 75% or 8 months @75%; after 6 years, 12 months @80% or 6 months@90%

Full salary for one semester leaves; half-salary if leave is longer than one semester.

If a 6-month sabbatical is taken, the librarian receives full pay. If a 12-month sabbatical is taken, it is at half-pay.

If for one semester or less, full pay. Beyond a semester, 1/2 pay.

Librarians on professional leave for 6 months receive their full regular pay. Librarians on professional leave for 12 months receive 75% of their regular pay.

Paid for professional development/research time as negotiated. Sabbaticals are paid full salary for six months or one-half salary if one year.

Sabbatical at 4 months = 85%. Sabbatical at 8 months = 75%. Sabbatical at 12 months = 65%. Funding for professional development depends on rank of faculty member (i.e., pre-sixth year review), necessary skills or training needed by library, etc.

Sabbatical leave for 1 year will be at half-pay.

Sabbatical leave up to six months is paid at 100%. Sabbatical leave between six and twelve months is paid at 3/5.
<http://www.asu.edu/aad/manuals/acd/acd705.html>

Scholarly Assignment Off Campus is full pay for 6 months or half pay for 12 months. Note: This is RARELY used by librarians. Release time is at full pay.

Not Paid

Although they can apply for time with pay, it would likely not be approved.

If it is university sponsored, it depends. The 24 days for library professional development are paid days.

They can be pay if they elect to use annual leave for any portion or all of the leave of absence.

They may use banked "sabbatical" leave for this time if they choose; vacation time they have banked over the years (must have 10 years before can bank 40 hours).

This is not a simple yes or no and will again vary based upon the purpose and length of the leave request.

Other Response

Decisions are made on a case-by-case basis as to the level of remuneration. There is no set percentage.

It depends on the research or project; maximum is 3 months full pay or 6 months half pay (which allows a longer absence while remaining in a benefits eligible status).

Librarians who are tenured faculty are eligible for sabbatical leave of one semester at half pay after a minimum of six semesters of service, or one semester at full pay to two semesters at half pay after a minimum of twelve semesters of service. Untenured library faculty members and librarians who are administrative/professional staff are not eligible for sabbatical leave.

Negotiated when applied for research leave.

No, to sabbatical. Professional development leaves are considered on a case-by-case basis.

Sabbaticals up to 1 year at 67% pay, 6 months at 75% and full pay at 3 months.

See above - pay may be full or partial depending upon the length of the leave. I. Eligibility: Those who have been employed as full-time librarians with continuing appointment status for at least six consecutive years, and who have not had a development leave in the past six years. Leaves may begin in the seventh year of appointment or the seventh year

following a prior leave. II. Options: Leaves may be for one semester (4 ½ months) at full salary or one academic year (9 months) at half salary. The leave period need not correspond with a particular semester of the academic calendar, but the leave period must be continuous.

The amount of pay is determined by the years of services and the number of months requested.

They are paid in full for the first 12-month sabbatical, 80% for any subsequent 12-month sabbatical, 100% for a subsequent 6-month sabbatical.

Varies. All or part of leave may be funded for good cause.

10. Are librarians at your library required to use personal, vacation, or other leave to attend professional conferences that are primarily for their own personal professional development? [For the purposes of this survey, "personal professional development travel" does not include travel where the employee is conducting business on behalf of the library.] N=70

Yes	7	10%
No	63	90%

Please enter any additional comments about leave time for professional development at your library.

Yes

Librarians may request for official leave with or without pay for professional development.

Librarians use professional leave to attend professional conferences. The time is not deducted from the librarian's sick or vacation leave time.

Often a combined use of PDT and vacation

They have 20 research days a year which can be used to attend professional activities.

No

A percentage of the effort of librarians engaged in sponsored research and, therefore, a portion of their time with pay, is dedicated to work on the specific research project. Aside from sponsored research projects, librarians may arrange for release time from other responsibilities to work on research and scholarship in pay status. Librarians who are tenured library faculty members are eligible for university-sponsored faculty fellowships for study in a second discipline, with release time from teaching for one semester or one academic year, with full pay and \$3,500 per semester in the form of supply and expense support for travel, equipment, software, and other similar expenses. Untenured library faculty members and librarians who are administrative/professional staff are not eligible for the fellowship program.

All approved professional activities and associated travel, including transit days, which occurs on traditional workdays, is treated as paid release time. Release time is provided for approved travel even when funding is not needed or granted.

All funded professional development leave requires approval of either an oversight committee or library administrator.

Competitive fellowship leaves may be granted.

If approved, weekdays are counted as work time; weekends and/or holidays are on personal time.

If it's to learn how to knit, then yes, that would need to be vacation time but if it's to enhance professional skills, then the library would cover the time.

In general, attendance or participation in approved professional development programs are considered paid work time and would generally receive support to offset travel and attendance costs. There have been occasions where the professional development is not related to their current employment/role and those requests are treated for funding and time off on a case-by-case basis.

In most cases, time off is granted for professional development.

Librarians apply through a process administered by the Librarian Review and Development Committee. It must be approved by the Supervisor, University Librarian, and the Executive Vice President for Academic Affairs. They must submit a report upon the completion of their research and/or professional development leave

Librarians are granted release time for conference attendance. Librarians may use 4 hours of Professional Activity Time (PAT) per week. It may be accrued, up to 8 hours, to be used at once. Use is optional, but it is lost if it is not used. There is no payment for unused PAT.

Note that librarians are not on the tenure track at this institution; thus, we have less emphasis on research time/sabbaticals.

Professional leave is granted to attend meetings and conferences.

Research leave is granted by application to the Faculty/Staff Research Committee comprised of peers in the library faculty and classified staff.

Research time is negotiated based on need and made part of the annual work plan.

Short-term PD leaves of less than one semester duration are allowed at full salary.

Staff can take a maximum of 10 days (80 hrs) each fiscal year. Time may be taken in blocks of no less than 2 hours and must be pre-arranged. Time must be approved.

This is sometimes recorded as administrative leave, but we see activities such as this as part of the Libraries' faculties' jobs.

Up to 5 additional days for Professional Service Leave. Up to 10 additional days for Conference/Workshop Leave.

FINANCIAL SUPPORT FOR PROFESSIONAL DEVELOPMENT

11. Does your library pay or reimburse conference attendees for **conference registration and/or travel and accommodations** for conferences they are attending primarily for their own personal professional development? [For the purposes of this survey, “personal professional development travel” does not include travel where the employee is conducting business on behalf of the library.] N=72

	Conference Registration N=67	Travel and Accommodations N=68
Yes, the library pays/reimburses the full cost	25	8
Yes, the library pays/reimburses a part of the cost	36	54
No, the library does not pay or reimburse	6	6

Full Registration, Full Travel	8	11%
Full Registration, Part Travel	17	24%
Part Registration, Part Travel	36	50%
No Registration, No Travel	6	8%
Other Response	5	7%

Please explain the allocation method.

Full Registration, Full Travel

Conference registration and cost of travel and accommodations are considered together. Dependent upon the total amount of the request and the fiscal situation, full or partial reimbursement may be granted.

Each librarian is allowed \$1,500 per year for personal professional development. Will pay 100% of registration, travel and accommodations, etc., up to total of \$1,500.

Librarians are allotted a set dollar amount for Professional Development each fiscal year. The Dean determines the amount, and it is distributed universally to all Librarians. Once a librarian’s allotment is depleted, they are still provided release time to attend conferences or meetings, but at their own expense. The same Professional Development allotment may be used for conference registration, travel (including airfare, ground transportation, rental car, etc.), accommodations, and meal per diem.

Librarians receive an allocation of travel money at the beginning of the fiscal year. They may use as they see fit as long as the conference or professional development opportunity is related to their job.

Occasionally, a portion of travel/registration costs may come through grants or other external funding sources.

Two possible funding sources; The Professional Development Reimbursement Fund (entitlement is \$500 per year and can be carried forward for 3 years = \$1,500) or the Library Employee Development fund, through annual budgeting process. Only partial funding may be available for a second or third event, with costs shared by the library and individual librarian.

Full Registration, Part Travel

Administrative travel (i.e., representing the Libraries) and training are paid 100%. Professional development funds are allocated by a library travel committee based on the level of participation. Registration is normally paid at the "early bird" member rate. Administrative travel (i.e., representing the Libraries) and training are paid 100%. Professional development funds are allocated by a library travel committee based on the level of participation.

Allocated based on type of participation and available funds.

An annual dollar cap of \$1350 per librarian has been set for FY10. Financial support for professional activities undertaken, both local and non-local, must be managed within this dollar cap. Allowable, reimbursable expenses for which the professional activities/travel dollar cap may be used include registration, up to full reimbursement. An annual dollar cap of \$1350 per librarian has been set for FY10. Financial support for professional activities undertaken, both local and non-local, must be managed within this dollar cap. Allowable, reimbursable expenses for which the professional activities/travel dollar cap may be used include travel and accommodations with limits set for each: reasonable airfare, \$30 ground transportation, and \$100/night for maximum of 4 nights lodging.

Based on a variety of factors including budget. Reimbursement policy is currently under review.

Faculty apply through Travel & Research Committee and funding based on % depending on level of participation and/or requirement to attend workshop, conference/meeting.

Federal per diem rate for meals in the city where expenses incurred. Mileage is reimbursable when one-way distance from work location exceeds 50 miles. Maximum reimbursement rate for lodging is \$170.00 per night including taxes. Exceptions must be approved by the Dean.

It is a formula that we pay a percentage depending on what they are doing and what level of Librarian they are. The max is 80% or \$800 of the travel and accommodations.

Librarians are allocated an amount each year. Depending on their professional development opportunities, the amount may pay all or only a portion of their expenses.

Library pays full cost for up to two conferences. Each librarian has a set budget and is responsible for any cost over that budgeted amount.

Participant Travel: This category applies to staff actively participating in the event by presenting a paper, serving as an officer of a significant group, serving as a panel discussant, or other such duties. NOTE: Documentation of this participation must accompany the A3! * Transportation: Maximum of \$450, including local ground transportation of \$50 maximum. * Registration Fee: Full costs. * Hotel and Meals: Maximum of \$110 per day/night, of which no more than \$35 per day may be applied towards meals. Allocation is based on the number of days of professional leave awarded plus weekend days, if applicable. Total must not exceed \$440. Attendee Travel: This category applies to individuals attending a conference or event with no specific business obligations. Expenses are covered at the same rates as Participant Travel, but with a maximum of \$550 per event.

Priorities for travel funding support in FY10: Priorities will be conferences/meetings/training needed to: a) accomplish the essential work of the library in FY10, and/or b) support librarians in meeting criteria for probation obligations, and/or c) keep up with issues, trends, initiatives in essential areas, and/or d) contribute to the profession through paper presentations, leadership and/or service. Funding for priorities in "a" (see above) will be funded at 100% of all reasonable costs (see "Reasonable" guidelines below). Funding for travel in "b – d" (see above) will begin at a base of 50% of all reasonable costs (see "Reasonable" guidelines below) and increase according to levels described below: + 30% - librarian in probationary period, + 10% - individual contributing to profession through leadership and/or service,

+10% - individual contributing to profession through paper presentation. "Reasonable" guidelines: Airfare - 14-day advance coach fare. Lodging - roommate cost, up to \$100/night. Food - per diem of \$40 day. Registration – early bird rate. Rental car – allowable when use reduces airfare cost commensurately. Ground transportation and parking – none. Personal auto mileage – in lieu of airfare up to cost of 14-day advance coach airfare. Local events – registration only. International events – funding level based on location, case by case.

The library has a travel committee responsible for the travel budget. Depending upon the number of trips they have to fund and the amount of budget they have during a particular year, travelers receive are reimbursed a portion of the cost.

The library pays 80% of costs which are reimbursable under university guidelines.

The Training Committee adjudicates.

Various policies between each Library/department. Some do not pay for food; some ask for librarians to share hotel rooms; some will give a dollar amount maximum for each conference; some will allow only 1 or 2 conference per year per librarian.

While staff development and participation in the profession is principally the responsibility of the individual staff member, the library encourages such involvement by providing paid released time for approved Category Two travel along with some financial support. Local area: The full cost of registration for the conference, workshop, course or meeting. Out of area: Transportation by the most economical means to the destination (includes ticket or personal mileage incurred to/from the destination) and the full cost of "early bird" registration, plus a daily supplement to offset actual expenses for meals, hotel, parking (airport and destination) taxis, etc. An exception to this is when travel is not possible directly to the destination, i.e., a conference is in St. Augustine, FL, but the closest airport is Jacksonville. In this case, taxi, airport transport and/or a rental car may be authorized. The supplement amount, based upon the travel purpose, will be determined annually prior to the start of the new fiscal year. In order to be reimbursed for the supplement, expenses must be detailed on the Travel Expense Form and receipts must be provided for an amount equal to or in excess of the supplement payable for the entire trip. Current reimbursement is \$40/day for attendance and \$75/day for participation to cover lodging, meals, etc. University is currently reviewing its travel policies and may be shifting to a per diem system.

Part Registration, Part Travel

"Other" is the best answer. All librarians are allotted a set amount of "travel" money annually that they may use for conference-related purposes. Reimbursement or pre-payment of conference registration is an allowable expense.

\$1,200 total per year for each librarian: can be allocated for conference registration, travel or both as long as limit is observed. Can apply for an additional \$500 of travel funds from a special pool.

\$600 for non tenured per year; \$300 for tenured per year

\$800/year is available to library faculty for registration and travel. An additional \$200 is awarded for professional involvement such as chairing a committee, presenting a paper, or serving on a board.

1) Fund A will make up 60 percent of the total Faculty Professional Travel Budget and will be allocated proportionately among the faculty. Each member of the faculty will be notified by July 31 of the amount allocated for him/her to spend in Fund A for travel expenses at his/her discretion. 2) Fund B will make up the remaining 40 percent of the Faculty Professional Travel Budget. The FPTC will recommend funding for individual travel requests out of Fund B based on the tenure status of the traveler and his/her reason for traveling. Funding recommendations from Fund B will be made according to the following priorities: 1) Untenured tenure-track faculty presenting, conducting research, or serving as a member of a committee. 2) Tenured faculty presenting, conducting research, or serving as a member of a committee. 3)

Untenured tenure-track faculty attending a conference, workshop, or educational program. 4) Tenured faculty attending a conference, workshop, or educational program. Under no circumstances will an individual be awarded out of Fund B more than 25 percent of the original total amount of money in that fund in a single year.

1) If traveler is representing the university at event where presentation is required, he/she receives maximum funding (everything but meals); 2) If traveler has substantive involvement presenting, holding elected office, chairing a committee/group, he/she receives a maximum up to \$600 per trip; 3) If traveler is ranked faculty member who has not yet undergone sixth year review, he/she receives maximum up to \$800 per trip.

A request form is submitted justifying the requested expense. Department heads approve the funding based on travel budgets allocated and pertinence to the library. Overall approval is done at the next highest level.

A travel committee allocates based on the employee's activities at the conference. The lump sum amount the employee receives is tiered based on attendance with "Program or Service Responsibilities" v. "Attendance Without Program or Service Responsibilities" and the funds are used to reimburse the employee for travel and/or registration.

Annual exercise reimbursement based on conference location, cost, and overall institution budget.

At the moment, Librarian I receives a \$1250 annual allocation; Librarian II, III, & IV receive a \$1000 annual allocation. These allocations have recently been reduced due to budget constraints. The allocation can be used to cover registration, travel, and/or accommodation. Registration costs greater than \$175 are automatically paid for by the Libraries.

Each employee has a fund amount based on tenure status. Once the fund has been expended no reimbursements are made.

Each librarian is currently allotted \$2,000.00 annually for professional travel.

Each librarian is given \$500/year to apply toward registration, travel, accommodations, etc. Additional Administrative funds are sometimes available on a per request basis.

Each library faculty member and each non-ranked appointed professional is allocated a lump sum, currently \$1,100, to support professional development for the year.

Each year the University Librarian allocates a dollar amount to our Research and Professional Development Committee which solicits, evaluates, and approves funding. Generally, the amount corresponds to the overall budget divided by the number of librarians making requests. If you have a single, inexpensive request you may be fully funded. If you have one expensive or multiple conferences, you will be funded to the individual maximum amount.

Employees are not guaranteed that they will be reimbursed. They must apply to library committee and make a case.

For most conferences, the library uses a percentage reimbursement schedule based on level of involvement. For example, for a Chair of an ALA Committee, the Library will reimburse 90% of the standard amount calculated to attend the conference.

Full cost is reimbursed up to a limit that is set annually. Librarians without continuing appointment and librarians in the highest performance group receive a maximum of \$2,900/year; those in the second performance group receive \$2,700/year; those in the third performance group receive \$2,500/year; those in the fourth performance group receive \$2,300/year; those in the fifth performance group receive 20% of total costs.

Funds are distributed based on numbers of employees traveling and numbers of conferences attended, based on availability of funds, on an annual request basis.

Generally, if it is associated with one's professional responsibilities, we reimburse 50% for attendance, 75% if on a committee, 100% if presenting a paper.

In the past, the library has paid member rate for registration at ALA annual and midwinter conferences, ACRL, annual state library association conferences, and other related professional meetings. Future funding may change due to economic climate. Professional staff are currently allotted \$1,100 annually for personal professional development. Professional staff may choose which meeting or conference to attend. However, the meeting or conference must related to professional responsibilities at the library.

It's based on the available resources. Generally, 80% of actual cost.

Librarians are allocated a set amount for professional development for conferences or transportation or accommodations based on availability of funds.

Librarians are eligible to receive \$705 annually; additional funds may be awarded based on availability and nature of the request.

Librarians can be reimbursed up to \$1,120 per year for professional development activities, including conference registration fees, from central library funds. Librarians may also receive financial support from departmental funds, technology training funds, and/or from the Librarians' Association of the University of California.

Librarians receive an annual allocation to cover expenses associated with professional development registration.

Library Faculty are allocated a specific dollar amount per calendar year based on their tenured/untentured status and service on national/state/local committees. Level 1: \$1,000 - general Library Faculty travel base funding. Level 2: \$1,400 - officer of state or regional group; or presents paper/poster at state or regional meeting. Level 3: \$1,600 - serves on national/foreign committee. Level 4: \$1,800 - untentured faculty; chair of national/foreign committee; presents paper/poster at national/foreign meeting; or elected officer of national/foreign group.

Library faculty received an allotment of \$1200 in FY 09 for purposes such as these. Faculty can also compete for up to \$500 in additional funding each year.

Registration is at "member level" for the sponsoring organization. Half of "reasonable" airfare (coach with advance purchase is required); \$120 per diem for all other expenses, capped at \$850 for an attendee, and \$2100 for a participant.

Reimbursable expenses include train/airfare, accommodations, local transportation, conference registration and meals, generally not to exceed \$700 per fiscal year.

The library pays \$500 (plus paid time off) for conference attendees and \$750 (plus paid time off) for committee members.

There is no clear answer, every submission is looked at on an individual basis. It depends on a list of various criterion, such as the cost, the size of our fund, how often an individual has gone before, etc.

This is strictly a case-by-case determination. Not all personal professional development opportunities are funded by the library, although a good portion are. Depends on the specifics.

To encourage participation in professional associations and the presentation of papers at conferences, all expenses were met by the library for the past several years. Due to financial constraints, this is no longer possible. For the 2009–2010 fiscal year, every librarian (whether faculty member or administrative/professional staff) is eligible for up to \$1,000 per fiscal year from library funds to support professional development that includes conference registration, travel, accommodations, per diem, and other miscellaneous costs associated with attendance at professional meetings and

conferences. An additional \$250 is available for each librarian who is an untenured faculty member. Two international travel grants of up to \$1,000, administered by the library with funds from the university's office of the vice president for research, are available to provide additional funding for library faculty who will have an active role (presenting papers or serving as officials) at recognized international meetings on topics related to the library's strategic research areas.

When we have any travel money, a flat rate of money is awarded and can be used as the traveler sees fit.

Other Response

Each full time librarian receives funds which they can use for conferences, workshops or other research activities such as for equipment/software/hardware and for professional memberships. The libraries also provide support for select programs. Also, the university has allocated funds to the librarians as a group. These funds may be used use for research activities-giving papers and/or conducting research projects. The funds are distributed by a research and awards committee composed of peers.

It depends and requires Associate Director decision/approval.

Librarians are allocated funds for professional development. The funds are determined by the librarian's rank. Either response listed above is true depending upon the decision of the librarian to use his or her funds for that particular conference.

Librarians are awarded a set amount of travel money each year. This amount varies between \$1,000 and \$1,300 each year. This money may be used for registration, travel, hotel, meals as the librarian see fit within the general University Travel Guidelines.

Library provides \$1000/year for non-permanent (non-tenured) librarians and \$800/year for other librarians. They may use the funds as they wish, i.e., registration, travel, lodging, meals, etc.

12. Does your library pay or reimburse librarians for personal memberships in professional associations, for example the American Library Association? N=71

Yes, the library pays/reimburses the full cost of membership in professional associations	4	6%
Yes, the library pays/reimburses a part of the cost of membership in professional associations	1	1%
No, the library does not pay or reimburse librarians for memberships in professional associations	65	92%
Other response	1	1%

Comments

Pays full cost

In most cases, the librarian applies to the Professional Development Reimbursement Fund (above).

Administrative funds may be available for librarians requested/required to attend an event on behalf of the library administration.

The same Professional Development allotment may be used for membership fees for professional associations. Each Librarian chooses how to utilize their annual Professional Development allotment. It may be used for membership fees, conference registration, travel, etc., but when it is depleted, no additional funds are provided for Professional Development during the fiscal year with the exception of administratively approved travel. Administrative travel funds may be available when attendance is requested by administrators for an individual to attend a meeting, conference, etc. Administrative travel funds are over and above the Professional Development allotment.

Up to a maximum of \$1400 provided in a professional expense allowance, which can also be used for other purposes such as conference travel.

Pays part of the cost

Every librarian is awarded a professional development allowance and those funds can be used for membership purposes. It is at the discretion of the librarian to determine how they would like that money to be used. It depends on how much money is left from this fund to determine if there is enough for the membership fee.

Does not pay for memberships

Also eligible to receive global travel funds and Library Faculty Organization grants by submitting proposal.

Any membership comes directly from personal professional development funds. Library administration also tries to support some professional development activities; attendance at workshops and visiting speakers.

Besides the travel committee funding, the library has professional development and travel funds that can be used to attend certain meetings and trainings that are job-specific.

Full reimbursement is provided for travel on behalf of the Libraries. Reimbursable expenses include train/airfare, accommodations, local transportation, conference registration and meals.

Librarians are allocated funds for professional development. The funds are determined by the Librarian's rank. Either response listed above is true depending upon the decision of the librarians to use his or her funds to pay for membership in professional organizations.

Librarians may apply for campus faculty development funds.

Librarians may request additional funding if they are particularly active in an association or have an obligation to attend.

Librarians receive paid working time to attend professional development conferences.

Policy for financial support of travel associated with professional development and training was revised for FY10 in response to budget cuts.

Prohibited by state regulations. Note that for 2008/09 and 2009/10 travel has been strictly curtailed by the university due to budget reductions.

The library encourages professionals to attend webinars by paying the full cost of registration when Asst. Univ. Librarians deem the experience to be worthy of support.

The Library generally doesn't pay for personal memberships however, institutionally we may pay for membership which would allow librarians privileges. Librarians/archivists are also entitled to professional development support as part of their collective agreement, some of which is funded by our library. This support can be used for personal memberships in professional associations.

The Library holds institutional memberships in several professional organizations.

The library will only allocate \$1,100 for tenured librarians and \$1,300 for non-tenured librarians. Librarians can apply for additional monies; there is a \$500.00 cap on additional monies beyond the allocation that can be requested.

The union has a number of grants and so does the university.

This is strictly prohibited.

University policy does not allow reimbursement for personal professional memberships.

University policy does not permit payment for personal memberships in professional associations.

Untenured librarians and those presenting at conferences may apply for an additional professional development allowance.

We differentiate between travel mandated by the organization, which is reimbursed at 100%, from travel to attend conference for personal professional growth, which is reimbursed on a sliding scale of 100% (present a paper), 75% (participate on a committee), 50% (attendance). Training costs are reimbursed at 100%.

JOB-RELATED EDUCATION AND TRAINING

13. Does your library pay or reimburse librarians for registration, books, materials, and/or equipment expenses for college credit courses that are job related? N=72

	Registration N=72	Books, etc. N=66
Yes, the library pays/reimburses the full cost	16	7
Yes, the library pays/reimburses a part of the cost	19	8
No, the library does not pay or reimburse	37	51

Full Registration	2	3%
Full Registration, Full Books, etc.	6	8%
Full Registration, Part Books, etc.	2	3%
Full Registration, No Books, etc.	6	8%
Part Registration	3	4%
Part Registration, Part Books, etc.	6	8%
Part Registration, No Books, etc.	10	14%
No Registration	1	1%
No Registration, Full Books, etc.	1	1%
No Registration, No Books, etc.	35	49%

Please explain the allocation method.

Full Registration

Librarians receive a tuition waiver for university courses. The faculty member must hold an appointment of twenty-five percent or more of full time service. Librarians are allocated funds for professional development. The funds are determined by the librarian's rank. Either response listed above is true depending upon the decision of the librarians to use his or her funds to pay for books.

Will pay for registration of courses that are job related and approved by approving official.

Full Registration, Full Books, etc.

Library Human Resources PD fund or branch/unit budgetary process, or at the discretion of the respective Assoc. University Librarian or Professional Development Reimbursement Fund.

The library pays or reimburses librarians for costs related to college credit courses that are required by the supervisor for job-related training, whether offered by the university or by another institution of higher education. For employees employed half-time or more, the university provides a partial remission of fees for credit courses taken at any of the university's campuses; therefore, the employee pays a reduced tuition rate and the library reimburses this amount. No fees are charged by the university to an employee who registers for a course at the request of his/her supervisor for the purpose of job training and who does not receive academic credit for the course.

Full Registration, Part Books, etc.

Books may be purchased from their professional development fund; it all depends on how much is left from their account.

Normally registration is covered in full. Other expenses may or may not be reimbursed; depends on cost and how closely related course is to job duties.

Full Registration, No Books, etc

College credit courses that are taken here are fully reimbursed, but books, etc. are not. College credit courses taken at other institutions are not reimbursed.

Tuition assistance is available for 6 course units — tuition, general fee and technology fee — per academic year. A maximum of 2 course units are covered in both the Fall and Spring semesters and 2 units are covered during the university's 2 summer sessions. One course unit is equivalent to approximately 3 credit hours.

Tuition waiver applies.

University employees may use a course fee waiver to pay for university courses whether or not the courses related to the individual's professional responsibilities.

Part Registration

Considered on individual basis based on situation and relationship to job duties and/or library needs.

Part Registration, Part Books, etc.

Depends on budget, availability of funds.

Effective January 1, 2009, the following enhancements to the Employee Tuition Assistance Program will be implemented

per university policy: * There will be an increase in the amount of the benefit from \$5,000/calendar year to \$5,250/calendar year. * There will be an increase in the allowed number of courses, from two courses per semester/quarter to three courses per semester/quarter, with a maximum of nine courses per calendar year. * Participants can also request a waiver to take courses at accredited schools in other states if the courses are not offered in North Carolina or if the employee's primary work location is in another state. Library staff association offers a scholarship program that awards funds to offset the cost of course related books and materials that provides, pending available funding, \$150/per staff member per semester.

Librarians can be reimbursed up to \$1,120 per year for professional development activities, including course fees or books for job related classes. Librarians may also receive financial support from departmental funds, technology training funds, and/or from the Librarians' Association of the University of California.

Librarians may use part of their annual allocation or request other funds which are allocated based on availability and nature of the request and relationship to job duties.

Some courses and related expenses are covered by the library as part of our professional expense policy; others are covered institutionally by the university under an educational assistance policy.

The library has funded some courses that were not a part of our university (the university pays tuition/fees for one course each semester).

Part Registration, No Books, etc.

\$800 is available from the library; once that is exhausted, money can be allocated from departmental discretionary funds, if available and the department head is amenable. The university offers all employees a \$2,000 benefit for education.

75% of tuition and fees to a maximum of \$600 per annum.

For full-time staff (regular staff) working 30 hours or more per week. The staff member has been in such a position for three months before course registration. The university will pay tuition for undergraduate, graduate, or professional courses for staff as follows: Staff must be eligible for the benefit and enrolled in an accredited institution; financial assistance is provided for one course per semester, or three courses per academic year; upon satisfactory completion of the course at another college or university, the university will reimburse eligible staff 70% of the charge for tuition, up to an amount equal to 70% of what the university would charge for similar level coursework; for course work at the university, a 70% discount will be applied to charges for tuition upon registration; fees, books, the remaining amount of tuition, etc., are the responsibility of the staff member; staff members who apply to the university for coursework are subject to the same competition for admission as other applicants.

Individuals apply annually; Administrative Council approves on a case-by-case basis. When approved, tuition is covered at \$290 per credit hour.

Institute's tuition assistance plan reimburses up to \$5,250 for full-time employees per calendar year for eligible courses (prorated for part-time employees). Tuition assistance is provided for various areas of study. While most courses that qualify for reimbursement are academic courses taken for credit and a grade at an accredited college or university, certain other courses may qualify as well. The Plan covers some fees including registration, application, computer, library, lab, and curriculum support but does not cover books, materials or equipment.

Part of the overall university's tuition support program. 75% of tuition for university classes (up to 4 credits/term). At outside institution, up to \$1,428 per term or 75% of tuition and fees, whichever is less. Does not include PhD coursework, only undergrad and graduate level.

Strictly speaking, the cost of registration is not paid by the library; this is a university benefit for eligible staff and faculty.

The university covers 50% of the cost of registration as a benefit.

We reimburse at 0 to 100% tuition depending on the course and its relevance.

With special approval, a portion of tuition costs may be covered with the allocation described in question #7.

No Registration, Full Books, etc.

An endowed account has been established for any library employee pursuing an MLS. This account reimburses employees for the cost of their books.

No Registration, No Books, etc.

Although the library does not pay/reimburse the cost for registration, the university does grant full waiver of tuition and fees for undergraduate and graduate courses for all employees on pay status.

But, employees do receive tuition remission from the university for taking classes.

Librarians can attend courses at the university at no cost - this excludes professional programs such as Law and Business.

The Arizona Board of Regents provides reduced tuition for employees to attend classes at any of Arizona's three universities. The library does not provide additional assistance.

The library does not augment the university tuition benefits.

The library does not, but it is possible to attend a 3 credit hour course each semester free of charge. The union pays for it. It is also possible to take an additional 8 credit hours per semester at a reduced tuition rate. This reduction is a university program.

The library may pay for registration based on the situation.

The university (not the Libraries) has a tuition waiver program for all permanent employees. The employee pays a \$5 processing fee per academic term. Employees are responsible for their own books, materials, and/or equipment expenses.

The University System has a tuition reimbursement program (TAP) that covers registration.

Tuition waiver is available for up to 6 credits per semester.

University allows librarians to enroll for up to 6 credit hours with no payment other than a technology fee that all students pay. No payment for other expenses.

14. Must these job-related courses be taken at the home institution? N=56

Yes	13	23%
No	43	77%

Comments

Yes

All expenses would be covered (and time counted as work time) if course is required for the job (i.e., "assigned training").

If not offered at home institution, other institutions considered.

Preference is given to a job-related course offered at the home institution.

Tuition waiver at home institution

No

Classes may be taken at any state university. However, the waiver is not applicable to professional programs, i.e., School of Law or School of Medicine.

Courses may be taken tuition-free at either the home institution or at any other state-supported institution within our state.

Each employee is eligible to take university classes at 25% of the normal tuition cost.

For employees employed half-time or more, the university provides a partial tuition remission for credit courses offered by any of the university's campuses.

However, courses taken on campus or within the whole University System may be covered by a generous staff tuition reduction, and/or partially covered by the campus Employee Benefit Fund.

Librarians are eligible for a tuition waiver for three courses per year from any of the 16 universities in the University System. No credit hour limit is specified.

Most are MLS courses taken through online enrollment.

Our librarians generally have an MLS and a second master's degree or PhD. To my knowledge, it's uncommon for them to be taking for-credit classes that are job related unless they are perhaps language or technology classes. These classes are paid for by the employee unless they are taken here where tuition remission applies. If the classes were for a second master's degree the employee would also pay the cost.

Per previous question, attendance here is not required.

The course will be paid in full as long as the institution is recognized and used for the librarian's professional development.

The courses do not have to be job-related as part of the University Systems program, but they must be taken at the home institution unless the home institution does not have that particular major or course. Then it can be taken at another University System institution.

15. How does your library handle librarians' time away from their normal duties in order to attend college credit courses that are job related? Check all that apply. N=68

Counted as time worked	42	62%
Employee uses personal time, e.g., vacation	24	35%
Employee is allowed to make up the time	32	47%
Not allowed during normal assignment hours	3	4%
Other response	3	4%

Comments

Counted as time worked

- Can use professional development time.
- For college credit courses that are required by the supervisor for job-related training, the time away from normal duties is counted as time worked.
- If an employee is REQUIRED by the Libraries/CCP to attend a university class, full release time for class attendance will be given (e.g., three (3) hours for a three (3) credit class).
- Library managers determine whether requested classes are "job-related" or not.
- Requires supervisor's approval.
- Supervisors may approve work time if the course is determined to be related to professional responsibilities.
- The maximum number of credit hours is determined by the Graduate College.
- The university has a tuition waiver/reimbursement plan (employees qualify after one year of full-time service or 2 years of part-time service). An employee can take up to 2 credit courses per semester. If the classes are taken at the university, the tuition is waived. Employees must pay full price for credit courses taken at another school and upon successful completion of the course the employee is reimbursed at 80%.
- The university offers the College Program, an educational benefit available to all full-time, benefits-eligible employees to encourage their development through formal education. To participate in this program, employees must have completed at least six months of employment. The program allows full-time employees release time from work to attend college courses. In general, courses may be job-related, degree-related or for career development. A maximum of three hours per week can be allowed for course attendance, and requests to take courses at other college campuses may be approved. Prior to registering for a class during work hours, an employee must obtain written approval from his supervisor.
- This happens very rarely; classes must be VERY "job-related."
- This hasn't come up so it's hard to answer but generally if we would require someone to take a course to enhance their skills, then it would count as time worked. There is no maximum number of credit hours, but generally taking college courses is frowned upon during work hours.

Allowed to make up the time

As exempt employees, librarians are expected to use flexible scheduling to meet work obligations.

Case-by-case basis—decided by supervisor.

Personal time, Allowed to make up the time

All time away must be negotiated with the person's supervisor.

This is very rare for librarians and I would say that employees are allowed to make up the time only when the schedule change doesn't negatively impact work. It's much more common for support staff to be enrolled in for-credit courses.

Counted as time worked, Personal time, Allowed to make up the time

Depending on the reason for taking the course a variety of methods are used.

Employees can be granted 3 hours/week education time if supervisor/departments agrees. That time is considered work time. Time above and beyond that (if approved at all) is usually taken as vacation. Classes are encouraged to be taken that will not cause unreasonable disruption to the unit operations/staffing.

It varies. If a course is determined to be work related, then it can be counted as time worked. Normally, schedules are flexed to allow attendance at classes and occasionally, if the employee needs more time, they will take leave.

Provide for up to 2.5 hrs per week paid release time.

Really depends on employee's major assignment and what he/she wishes to do.

The library will allow up to 6 hours of paid release time per week. Approval is based on a quarter or semester basis and takes into account operational considerations.

This varies on the situation.

This is at the supervisor's discretion, but is normally counted as time worked if classes are during work hours.

All of the above

With approval, a librarian may carry an average of 4 credits a term for released time during no more than 3 consecutive terms, up to a maximum of 12 credits. Additional time may be handled with the other 3 options.

Other response

If a college course is needed for the job, it may be taken during work time (e.g., a language course), but in this case it is audited and not taken for credit.

Librarians normally do not clock their hours. Most work hours are flexible and often exceed a minimum required 35 hours per week.

University allows one course at a time to be taken on work time; additional courses are on personal time. No credit hour limit per semester; the limit is one course, regardless of number of credit hours.

16. Please indicate the maximum number of credit hours of job-related college credit courses that librarians may take per session. N=29

Credit hours per session

Minimum	Maximum	Mean	Median	Std Dev
3	No limit	6.71	6	2.83

Number of Hours	Number of Responses
3	2
4	1
6	12
7	1
8	3
9-12	1
16	1
No limit	8

PERSONAL DEVELOPMENT EDUCATION AND TRAINING

17. Does your library pay or reimburse librarians for registration, books, materials, and/or equipment expenses for college credit courses that are primarily for their own personal development? N=72

	Registration N=72	Books, etc. N=70
Yes, the library pays/reimburses the full cost	9	1
Yes, the library pays/reimburses a part of the cost	12	3
No, the library does not pay or reimburse	51	66

Full Registration	2	3%
Full Registration, Full Books, etc.	1	1%
Full Registration, No Books, etc.	6	8%
Part Registration, Part Books, etc.	3	4%
Part Registration, No Books, etc.	9	13%
No Registration, No Books, etc.	51	71%

Please explain the allocation method.

Full Registration

Librarians receive a tuition waiver for university courses. The faculty member must hold an appointment of twenty-five percent or more of full time service. Librarians are allocated funds for professional development. The funds are determined by the librarian's rank. Either response listed above is true depending upon the decision of the librarians to use his or her funds to pay for books, etc.

The university waives half tuition. The employee is responsible for the other half.

Full Registration, Full Books, etc.

Books and equipment: reimbursement and cost/sharing negotiable.

Full Registration, No Books, etc.

These are paid for only if they are taken here.

University employees may use a course fee waiver to pay for university courses whether or not the courses related to the individual's professional responsibilities.

Part Registration, Part Books, etc.

Librarians can be reimbursed up to \$1,120 per year for professional development activities, including course fees or books for personal enrichment classes.

Similar to question 8. Some courses and related expenses are covered by the library as part of our professional expense policy; others are covered institutionally by the university under an educational assistance policy.

The cost is taken from their professional development fund. Note: The registration is paid in full only if the course can be used for professional development.

Part Registration, No Books, etc.

\$800 is available from the library; once that is exhausted, money can be allocated from departmental discretionary funds, if available and the department head is amenable. The university offers all employees a \$2,000 benefit for education.

For employees employed half-time or more, the university provides a partial remission of fees for credit courses; therefore, the employee pays a reduced tuition rate.

Institute's tuition plan may be used for GED through Graduate Degree. Coverage of Job-Related: studies from which you gain knowledge that will enhance your performance in a significant amount of your current job OR Career-Related: studies or degree programs that prepare you for advancement in your current or another field of work in which realistic full-time employment opportunities exist at the institution. Note: Graduate degree programs must be taken as Career-Related Study to enhance on-the-job skills or to expand one's career opportunities at the Institute. Tuition assistance is available for all levels of study, from GED to graduate level.

Strictly speaking, the cost of registration is not paid by the library; this is a university benefit for eligible staff and faculty.

The institution waives the instructional fees (tuition); the Libraries cover 50% of general fees on a case-by-case basis.

The same policy in the previous section applies. Very few disciplines are not eligible to be refunded.

The university covers 50% of the cost of registration as a benefit.

Tuition waiver applies.

The university will assist with paying tuition for undergraduate, graduate, or professional courses for staff as follows: Staff must be eligible for the benefit and enrolled in an accredited institution; financial assistance is provided for one course per semester, or three courses per academic year; upon satisfactory completion of the course at another college or university, the university will reimburse eligible staff 70% of the charge for tuition, up to an amount equal to 70% of what the university would charge for similar level coursework; for course work here, a 70% discount will be applied to charges for tuition upon registration; fees, books, the remaining amount of tuition, etc., are the responsibility of the staff member; staff members who apply to the university for coursework are subject to the same competition for admission as other applicants.

No Registration, No Books, etc.

But, the university does give tuition remission to all employees.

Librarians can attend courses at the university at no cost. This excludes professional programs such as Law and Business.

The Arizona Board of Regents provides reduced tuition for employees to attend classes at any of Arizona’s three universities. The library does not provide additional assistance.

The library does not augment the university tuition benefits.

This information is the same as the previous information regarding job-related classes.

Tuition waivers are for any undergraduate or graduate course.

University allows librarians to register for free for up to 6 credit hours. Payment of a student technology fee is required.

18. Must these college credit courses be taken at the home institution? N=47

Yes	12	26%
No	35	74%

Comments

Yes

Employees may enroll in other institutions at their own expense on their own time.

The courses do not have to be job-related as part of the University Systems program, but they must be taken at the home institution unless the home institution does not have that particular major or course. Then it can be taken at another University system institution.

No

For employees employed half-time or more, the university provides a partial tuition remission for credit courses offered by any of the university’s campuses.

If the course is not required for the job, but of interest to the employee, for-credit courses can be taken free-of-charge through the university's tuition waiver program. (3 classes per year at any university system institution). Flex-time and paid personal leave are both available to cover time in class.

Librarians are eligible for a tuition waiver for three courses per year from any of the 16 universities in the University System. No credit hour limit is specified.

May be taken at any public institution in the state.

19. How does your library handle librarians' time away from their normal duties in order to attend college credit courses that are primarily for their own personal development? Check all that apply.
N=63

Counted as time worked	9	14%
Employee uses personal time, e.g., vacation	37	59%
Employee is allowed to make up the time	37	59%
Not allowed during normal assignment hours	12	19%
Other response	1	2%

Comments

Counted as time worked

Counted as work time only if at home institution.

Limits on the number of units of credit that may be taken by faculty are determined by the Graduate College.

Personal time

Employee might be allowed to make up time, depending on the circumstances.

Allowed to make up the time

As exempt employees, librarians are expected to use flexible scheduling to meet work obligations.

Case by case basis---decided by supervisor.

Employees DO need their team leader's permission to enroll in classes which meet during their normal work hours, and all missed time must be made up on a schedule approved by the team leader.

Librarians may adjust their work schedules to take college credit courses. With approval at the library and university levels, a faculty member may be granted a leave of absence without pay to pursue an advanced degree.

Personal time, Allowed to make up the time

All time away must be negotiated with the person’s supervisor.

In some cases, library may count as time worked.

No release time is granted for undergraduate courses at institutions other than the university.

Counted as time worked, Personal time, Allowed to make up the time

Staff taking skill-enhancing classes or classes that help maintain knowledge base are allowed 10% release time, with flexibility in work schedule.

This is at the supervisor’s discretion.

Other response

University policy is one course per semester may be taken on work time; additional courses are on personal time. There is no semester credit hour limit; simply one course on work time, regardless of semester credit hours.

20. Please indicate the maximum number of credit hours of college credit courses that librarians may take per session primarily for their own personal development. N=28

Credit hours per session

Minimum	Maximum	Mean	Median	Std Dev
3	No limit	6.3	6	2.69

Number of Hours	Number of Responses
3	2
4	1
5	1
6	11
7	1
8	2
16	1
No limit	6
Other	3

JOB-RELATED INTERNSHIPS

Internships are experience-based programs that are associated with the pursuit of an academic degree.

21. Does your library pay or reimburse librarians for **registration; books, materials, and/or equipment expenses; or travel and accommodations** for participation in internship programs that are job related?
N=65

	Registration N=56	Books, etc. N=55	Travel N=56
Yes, the library pays/reimburses the full cost	9	5	7
Yes, the library pays/reimburses a part of the cost	8	6	7
No, the library does not pay or reimburse	39	44	42

Full Registration, Full Travel	1	2%
Full Registration, Full Books, etc., Full Travel	5	8%
Full Registration, Part Books, etc., Part Travel	1	2%
Full Registration, No Books, etc., Full Travel	1	2%
Full Registration, No Books, etc., No Travel	1	2%
Part Registration, Part Books, etc., Part Travel	5	8%
Part Registration, No Books, etc., Part Travel	1	2%
Part Registration, No Books, etc., No Travel	2	3%
No Registration, No Books, etc., No Travel	39	60%
Other Response	9	14%

Please explain the allocation method.

Full Registration, Full Books, etc., Full Travel

This happens rarely, maybe one librarian per year. Individual decision by the Director.

Full Registration, No Books, etc., Full Travel

Policy allows for such experiences; they seldom occur.

Part Registration, Part Books, etc., Part Travel

Current experience with first such case based on unique circumstances and opportunity to feed sci-tech librarian pipeline. Library support staff member with science degree and commitment to obtaining MLS under agreement with Libraries to serve as liaison to particular library community and to pursue MLS. Commitment from Libraries to provide mentor, development opportunities, and supplemental financial support in addition to that provided by Institute tuition assistance plan.

Librarians can be reimbursed up to \$1,120 per year for professional development activities, including course fees or books for internships.

No allocation formula. The amount would be based on the overall expenditures.

This is handled on a case-by-case and decision is made by library Cabinet (decision-making group).

We have not had any such internships taken in the past 10 years that I can think of, however I'm sure the organization would consider some support depending on the specifics.

Part Registration, No Books, etc., Part Travel

These would require approval and be considered on a case-by-case basis.

Part Registration, No Books, etc., No Travel

75% of tuition & fees to a total of \$600 per annum.

If the internship is part of college credit and the staff member must pay for the course, the university will reimburse eligible staff 70% of the charge for tuition, up to an amount equal to 70% of what it would charge for similar level coursework. If the internship is not part of paid tuition, we do not pay or reimburse.

No Registration, No Books, etc., No Travel

Library faculty do not routinely participate in internship programs.

Not aware of internship programs for professional staff.

Our librarians might pursue additional degrees but internships are not part of the program.

The Arizona Board of Regents provides reduced tuition for employees to attend classes at any of Arizona's three universities. The library does not provide additional assistance.

Unless an internship is part of a course of study, then the time would not be reimbursed by the library or through the university's tuition assistance program.

We've never had anyone participate in internship programs.

Other Response

Basically, if we request a librarian to attend training or an institute, e.g., Frye Institute, we would pay all of the allowable expenses and the time away would be considered time worked. We have not had the experience of anyone in a job-related internship.

I have left all of the above questions blank. To my knowledge there would no reason for our librarians to be participating in internship programs. We sometimes have support staff who are in library school and they participate in internship programs.

In my time here, I have not dealt with this.

Librarians are allocated funds for professional development. The funds are determined by the librarian's rank. Either response listed above is true depending on the decision of the librarians to use his or her funds to pay for registration, books, etc. and travel.

No job-related internships associated with an academic degree have been requested by librarians; in the event of such a request, payment/reimbursement and details of the librarian's time away from normal duties would be negotiated.

The university provides funding for a number of faculty development opportunities, typically termed "fellowships," for which librarians who are faculty members are eligible. One of these, the Provost Fellows program, for faculty with demonstrated potential and interest in academic administration, includes opportunities to work with the office of the provost, the president, or the vice president for research. Appointments are up to 0.5 FTE for two semesters, with salary savings returned to the faculty member's department (e.g., the library).

Situation has never come up; decision would be on case-by-case basis.

This has not come up.

We have not had this kind of request.

We would pay for formal programs like ARL's RLLF.

22. Must the job-related internship take place at the home institution? N=31

Yes	3	10%
No	28	90%

Comments

If an internship is part of a university degree program requirement and is taken for course credit, tuition reduction benefit applies.

If not possible at home institution, other institutions may be considered.

Our state consortium encourages internships at sister institutions & has a mechanism in place to facilitate them, but they seldom occur.

23. How does your library handle librarians' time away from their normal duties in order to participate in internship programs that are job related? N=39

Counted as time worked	16	41%
Employee uses personal time, e.g., vacation	17	44%
Employee is allowed to make up the time	14	36%
Not allowed during normal assignment hours	8	21%
Other response	2	5%

Comments

Counted as time worked

Based on the direct relevance of the internship program with the librarian's responsibilities release time would be given or the librarian could negotiate for partial release time.

Our experience has been that only non-librarians have requested internships and we have tried to accommodate the requests (primarily for staff in library school) on a case-by-case basis.

Requires supervisor’s approval.

Allowed to make up the time

Case-by-case basis—decided by supervisor.

Personal time, Allowed to make up the time

All time away must be negotiated with the person’s supervisor.

An employee may request an unpaid leave of absence or a reduction in their assigned work hours in addition to the marked responses.

If the internship was not part of a for credit course, we would try to work with the employee to take leave and to flex their schedule.

Counted as time worked, Personal time, Allowed to make up the time

Based on supervisor’s assessment of workload, performance, employee obligations, etc. No max credit hours established.

Depends on the type and duration of the internship, service impact, etc.

Other Response

If full-time, the librarian may apply for professional development leave without pay.

No job-related internships associated with an academic degree have been requested by librarians; in the event of such a request, payment/reimbursement and details of the librarian’s time away from normal duties would be negotiated.

24. Please indicate the maximum number of credit hours per session OR number of hours per week librarians may dedicate to participation in internship programs that are job related. N=15

Number of hours per week N=2

3 hours, 10 hours

Credit hours per session N=13

Minimum	Maximum	Mean	Median	Std Dev
6	No limit	6.6	6	.98

Number of Hours	Number of Responses
6	5
8	2
No limit	5
Varies	1

PERSONAL DEVELOPMENT INTERNSHIPS

25. Does your library pay or reimburse librarians for **registration; books, materials, and/or equipment expenses; or travel and accommodations** for internships that are primarily for their own personal development? N=63

	Registration N=61	Books, etc. N=61	Travel N=61
Yes, the library pays/reimburses the full cost	1	—	—
Yes, the library pays/reimburses a part of the cost	4	1	1
No, the library does not pay or reimburse	56	60	60

Full Registration, No Books, etc., No Travel	1	2%
Part Registration, Part Books, etc., No Travel	1	2%
Part Registration, No Books, etc., Part Travel	1	2%
Part Registration, No Books, etc., No Travel	2	3%
No Registration, No Books, etc., No Travel	56	89%
Other Response	2	3%

Please explain the allocation method.

Part Registration, Part Books, etc., No Travel

Librarians can be reimbursed up to \$1,120 per year for professional development activities, including course fees or books for internships.

Part Registration, No Books, etc., Part Travel

We have not had any such internships taken in the past 10 years that I can think of, however I'm sure the organization would consider some support depending on the specifics.

Part Registration, No Books, etc., No Travel

If the internship is part of college credit and the staff member must pay for the course, the university will reimburse eligible staff 70% of the charge for tuition, up to an amount equal to 70% of what it would charge for similar level coursework. If the internship is not part of paid tuition, we do not pay or reimburse.

The libraries cover 50% of general fees for internships through the home institution.

No Registration, No Books, etc., No Travel

It would not matter if it were job relation or primarily for their own personal development. Unless an internship is part of a course of study, then the time would not be reimbursed by the library or through the university's tuition assistance program.

The Arizona Board of Regents provides reduced tuition for employees to attend classes at any of Arizona's three universities. The library does not provide additional assistance.

Varies based on individual situation; may be some level of support if related to job responsibilities; normally not.

We've never had anyone participate in internship programs.

Other Response

Librarians are allocated funds for professional development. The funds are determined by the librarian's rank. Either response listed above is true depending on the decision of the librarians to use his or her funds to pay for registration, books, etc. and travel.

We have not had a request for an internship of this type.

26. Must the internship that is primarily for their own personal development take place at the home institution? N=25

Yes	1	4%
No	24	96%

27. How does your library handle the librarians' time away from their normal duties in order to participate in internships that are primarily for their own personal development? Check all that apply. N=37

Counted as time worked	2	5%
Employee uses personal time, e.g., vacation	24	65%
Employee is allowed to make up the time	20	54%
Not allowed during normal assignment hours	11	30%

Comments

10% release time with flexible work schedule.

All time away must be negotiated with the person's supervisor.

Case-by-case basis—decided by supervisor.

Research leave or leave without pay may be applied for.

The librarian must use personal vacation time or Leave without Pay for personal development internships.

28. Please indicate the maximum number of credit hours per session OR number of hours per week librarians may dedicate to participation in internship programs that are primarily for their own personal development. N=11

Number of hours per week N=1

3 hours

Credit hours per session N=10

Minimum	Maximum	Mean	Median	Std Dev
6	No limit	6.8	6.5	.98

Number of Hours	Number of Responses
6	3
7	1
8	2
No limit	3
Varies	1

PROFESSIONAL CERTIFICATION EXAMS

29. Does your library pay or reimburse librarians for expenses for professional certification exams? N=66

Yes, but only if the certification is job-related	16	24%
No	50	76%

30. Does your library pay or reimburse librarians for preparatory course expenses or for books, materials, and equipment expenses for professional certification exams? N=62

	Preparatory Course N=62	Books, etc. N=62
Yes, the library pays/reimburses the full cost	6	5
Yes, the library pays/reimburses a part of the cost	7	4
No, the library does not pay or reimburse	49	53

Full Course, Full Books, etc.	5	8%
Full Course, No Books, etc.	1	2%
Part Course, Part books, etc.	4	7%
Part Course, No Books, etc.	3	5%
No Course, No Books, etc.	49	79%

Please explain the allocation method.

Full Course, Full Books, etc.

Librarians can be reimbursed up to \$1,120 per year for professional development activities, including course fees or books for internships. There are also funds for technology-related professional development activities which may be used for IT-related certification. Librarians may also receive financial support from departmental funds, technology training funds, and/or from the Librarians’ Association of the University of California.

Part Course, Part books, etc.

Depends on budget- availability of funds.

Must be paid through their professional development allowance, therefore it varies on how much funding is left from their account.

The only certifications sought have been for systems librarians needing certification on different hardware, software or programming languages. The amount and type of reimbursement has been on a case-by-case basis.

Part Course, No Books, etc.

75% of cost to a total of \$600 per annum.

May be covered under Institute’s tuition assistance plan.

The university covers up to \$2,000.

31. How does your library handle librarians’ time away from their normal duties in order to prepare for or take professional certification exams? N=43

Counted as time worked	14	33%
Employee uses personal time, e.g., vacation	24	56%
Employee is allowed to make up the time	18	42%
Not allowed during normal assignment hours	8	19%

Comments

Counted as time worked

Employee uses professional leave.

If library requires certification, then time away would be counted as time worked, otherwise employee may be allowed to make-up the time and/or use vacation leave.

Our IT librarian may need certification in some instances.

Requires supervisor approval.

Allowed to make up the time

Case-by-case basis—decided by supervisor.

Personal time, Allowed to make up the time

All time away must be negotiated with the person's supervisor.

Counted as time worked, Personal time, Allowed to make up the time

We would work with the employee for time away from normal duties.

Not allowed

Professional Certification is not currently required of our librarians. If we had a medical library and membership in the Academy of Health Information Professionals was required, this would be reviewed.

OTHER LEAVE OR PROFESSIONAL DEVELOPMENT BENEFITS

32. Does your library offer any other type of leave or professional development benefits to librarians?

N=69

Yes	39	57%
No	30	43%

If yes, please describe the benefit.

A librarian can request "special leave" from the university for a specific purpose, including attending a professional meeting and additional education, and length of time. Up to 30 days with pay with Provost approval; up to a year unpaid with further approval.

A professional development fund and travel allowance is allocated as part of our librarians and archivists collective agreement. Compassionate leave is also granted for bereavement, to attend to urgent or critical health needs of immediate family or other personal reasons requiring urgent attention.

Ability to apply for University Foreign Travel Grants or library-funded research grants.

As a consortium member institution, we select 3 to 5 librarians for, and fully fund attendance at, the TRLN Management

Academy, a week-long professional development and leadership program for mid-level managers in academic libraries. We also encourage and financially support other competitive development opportunities at the university, state, and national levels.

Bereavement Leave; Jury Duty Leave; Military and Military Training Leave

Bereavement or comparable emergency leave, civil leave (jury duty), military leave.

Courses related to or in support of one's position may be authorized and payment for course approved and paid for by the library.

Eligible for personal unpaid leave.

Flexible scheduling. Some work-at-home opportunities. Administrative travel support for job-related committee work, e.g., with the regional network, the consortium, etc.

Flexible Work Schedule; Telework; Credit Leave, Comp Time, Comp Time for Travel

FMLA Leave: A staff member who has met the eligibility requirements for FMLA may receive up to 12 weeks of leave in any rolling 12 month period. Non-FMLA Leave: Staff members who do not meet the eligibility requirements for a leave under FMLA may request a leave of absence for a self-qualifying medical event. Time away from work may not exceed six weeks in their first 12 months of service at Vanderbilt. This leave period for staff in their first 12 months of service is to be taken as continuous leave only. Also, a staff member with a serious medical condition who has exhausted leave available under the FMLA may request an extended medical leave, subject to the 6-month maximum leave period.

Personal Leave: An eligible staff member who has completed at least 12 months of service and who is in good standing may request personal time off for reasons such as educational opportunities, travel or to care for a family member or to spend time with a new baby or child placed in the home within the first 12 months in situations not covered by the FMLA. However, personal leaves are not granted for engaging in employment outside of Vanderbilt or pursuing an independent business venture. Leave time under this provision cannot exceed the six month maximum time available under any combination of leaves granted in any rolling 12-month period.

For employees employed half-time or more, the university provides paid parental leave (that does not reduce an eligible employee's balance of any other paid leave such as sick, vacation, or personal business days or personal holiday) at 100 percent of the employee's straight-time, regular pay, for the purpose of recovery from the birth of a child and/or to bond with a newborn or with a newly-adopted child under the age of 18. Birth mothers may receive up to 240 hours of paid parental leave; all other eligible employees who become parents of a newborn or newly adopted child may receive up to 120 hours. If both parents are eligible employees, the parents may elect to combine the total number of hours and allocate it between them. The leave applies to a male or female employee who is a birth mother; a father of the birth child; a same-sex domestic partner of the birth mother; a same-sex domestic partner of the birth father; an adoptive mother or father; a same-sex domestic partner of an adoptive mother or father.

Full-time librarians receive full tuition reimbursement to attend non-credit classes at the University of Chicago Graham School of General Studies. In addition, the University's Human Resources department offers work-related courses in their business and professional programs at no cost.

Leave Without Pay for professional development.

Leave without pay. "Sesqui" Leave: Each school of the University may administer a periodic program of academic leaves, often referred to as Sesquicentennial Associate ships. These are competitive awards. The purpose of a Sesqui Leave is to help faculty invigorate their research and teaching activities.

Librarians are eligible to apply for Education Release which allows them to take one day a week off for up to a year.

Funds are allocated to the librarian's department to pay for staff to fulfill librarian activities normally performed by the librarian on Education Leave. The maximum number of such releases in one year is three. Faculty are also eligible for Education Release and funds are used to provide "one course release" and pay for the delivery of the course normally taught by the person on education release.

Librarians are offered professional leave according to ranks. Tenure track librarians received 15 days with pay and Clinical track librarians receive 10 days with pay.

Librarians have leave of absence options under their collective bargaining agreement, some LOAs are with pay and many are without pay.

Librarians may also receive financial support from departmental funds, technology training funds, and/or from the Librarians' Association of the University of California. In addition, there is a special "Two-month Leave" which may be used for professional development activities, if approved.

Librarians may design their own unique professional development leave or project, then apply for library funding from a central fund; a committee of peers determines who receives funding. Examples of past projects include: Funding for travel to South America where documents were scanned and oral history interviews were conducted. Time-off was granted to complete research for a book (and later to write the book). Funding for travel to libraries around the state to examine items included in a bibliography.

Librarians receive separate funding for both professional development and training.

Librarians, as part of their union contract, are awarded an annual sum for professional development. Librarians use this allotment to attend conferences (such as ALA, SLA), workshops, etc., on behalf of the library and university

Occasionally we send librarians to leadership development programs like FRYE, Harvard Executive Program or internal training programs at Columbia. We have a series of Digital Initiatives talks that librarians are encouraged to attend. We regularly send librarians to Rare Book School.

On campus non-credit courses; In-house training programs; webinars

One day of release time per week per year up to 15 weeks for professional development purposes.

Professional and educational leaves, both without pay and up to one year. Military, medical, and FMLA leaves depending on the circumstances of the individual.

Research funds to support photocopy, mailing surveys, travel to other libraries, etc. There is a small allocation shared by all faculty and administered by faculty themselves through elected committee.

Research leave; leave without pay

Sabbaticals

The union and the university provide grants. One of them will give a person time off the tenure clock.

The University offers unpaid leaves of absence for employees. The Short-Term Leave of Absence for up to 30 work days (not to exceed six weeks) or University Leave of Absence for up to 12 months. Leaves must be approved by the staff member's department head (this includes verifying that the employee meets the eligibility requirements for a leave). The department must retain the staff member's position or a comparable position.

The university permits librarians to take up to nine hours of classes on a space-available basis. As regular faculty members, however, they are not permitted to earn a degree.

Time Grant Program for leaves of less than 240 hours.

Tuition waiver benefit; personal leave without pay; administrative leave

The university has a pilot program called Faculty Enhancement Opportunities (FEOs). FEOs are intended to be more flexible in nature and duration than traditional sabbaticals. Thus FEO funds are to be expended primarily for salary/benefit offset, travel costs and/or fees for conferences or similar learning experiences. FEO funds are generally not intended to fund such things as equipment/supply purchases, pilot studies, GRAs or similar items for which other sources of support are available.

University-wide opportunities that I mentioned earlier.

We have a robust training and professional development program which offers programs on a host of topics relevant to their duties. There is no charge for these programs and staff are paid when attending.

ADDITIONAL COMMENTS

33. Please enter any additional information about leave and professional development benefits for librarians at your library that may assist the authors in accurately analyzing the results of this survey.

Benefits for librarians are the same as those provided to the entire Smithsonian Institution.

Besides the formal programs, we would be willing to consider leave requests that benefit the librarian and the libraries. Any creative idea would be considered.

Due to budget restrictions, professional travel/leave funding is under review. How we allocate funding now may not be the same as how we do it in another year or so, and is not what we did a year ago (were more generous for post-sixth year review faculty). It's a moving target.

Librarians do not have a fixed amount of professional development money per librarian but rather get partial reimbursement for as many events as they want to attend each year.

Librarians each have 20 days a year which may be applied to work on research projects and/or attend conferences and workshops. Librarians may take university courses as their "sabbatical project" when they are on sabbatical leave.

Policies regarding sick leave, vacation, and tuition benefits are university policies available to all full-time and part-time staff.

The responses reflect policies that apply to all university staff. There are no special benefits for librarians, with one exception. The 80% reimbursement of travel costs and 100% reimbursement of registration fees is library policy, not university-wide.

There is considerable discretion for approving professional development activities at the branch/division head level. Benefits are identical to faculty for study leave/sabbatical leave, sick leave, professional development reimbursement fund.

When I keep referring to the professional development allowance, this means that all librarians are given a fixed amount each year for funding that would not be paid through our tuition assistance program or through travel expense. This includes, book and material costs, membership fees, electronic devices used for professional development (i.e., laptops). When their fund is used for the year and if there are more expenses it must be paid through the librarian's own pocket.

RESPONDING INSTITUTIONS

University at Albany, SUNY	University of Massachusetts, Amherst
University of Alberta	Massachusetts Institute of Technology
University of Arizona	University of Michigan
Arizona State University	Michigan State University
Auburn University	National Agricultural Library
Boston College	University of Nebraska—Lincoln
Brigham Young University	University of North Carolina at Chapel Hill
University of British Columbia	North Carolina State University
University of California, Irvine	Northwestern University
University of California, Los Angeles	Ohio University
University of California, Riverside	Oklahoma State University
University of California, Santa Barbara	University of Oregon
Case Western Reserve University	University of Pennsylvania
University of Chicago	Pennsylvania State University
University of Cincinnati	Purdue University
University of Colorado at Boulder	Rice University
Colorado State University	University of Rochester
Columbia University	Rutgers University
University of Delaware	Smithsonian Institution
Duke University	Southern Illinois University Carbondale
Emory University	Syracuse University
University of Florida	University of Texas at Austin
George Washington University	Texas A&M University
Georgetown University	Texas Tech University
University of Georgia	University of Utah
University of Hawaii at Manoa	Vanderbilt University
University of Houston	University of Virginia
University of Illinois at Chicago	Virginia Tech
Indiana University Bloomington	University of Washington
University of Iowa	Washington State University
Iowa State University	Washington University in St. Louis
Kent State University	University of Waterloo
University of Kentucky	Wayne State University
Library of Congress	University of Western Ontario
University of Louisville	University of Wisconsin—Madison
McGill University	York University
McMaster University	



REPRESENTATIVE DOCUMENTS

Travel Policies

Columbia University Libraries

Travel Support Categories and Levels of Funding

The policy of the Libraries is to encourage staff members to join and take an active part in professional and scholarly associations and to participate in scholarly and professional meetings. The Professional Development committee grants funding and leave for attendee and participant professional development travel, institutional development travel, and Junior Librarian and New Directions/Librarian III awards. Libraries Administration makes awards for administrative and bibliographer travel.

Requests for professional development, institutional development, administrative, and bibliographer travel are made using the **A3 Form**, formerly known as the "Lilac". Please consult the **A3 Instructions** in addition to the information provided below when completing the form.

Combined professional development and bibliographer travel

If a single trip will combine conference attendance and book-buying, both goals can be indicated on a single form. Your director should make clear that both types of funding are being requested. Financial Services will route such forms to both PDC and the Head of Collection Development, with both funding entities contributing monies.

Administrative Travel

This category applies to staff who are required to attend business meetings as an integral part of the job. Attendance is not optional. It also applies to necessary and required training.

- Transportation (to/from): Reasonable costs. Saturday stayover if feasible.
- Local Ground Transportation: \$50 maximum.
- Registration Fee: Full costs (although registration fee is not normally a factor).
- Hotel: Maximum of \$110 per night (costs over this limit must have prior approval).
- Meals: Maximum of \$35 per day (costs over this limit must have prior approval). Meal money may be applied to hotel costs to a maximum of \$145 per night.

Participant Travel

This category applies to staff actively participating in the event by presenting a paper, serving as an officer of a significant group, serving as a panel discussant, or other such duties. **NOTE: Documentation of this participation must accompany the A3!**

- Transportation: Maximum of \$450, including local ground transportation of \$50 maximum.
- Registration Fee: Full costs.
- Hotel and Meals: Maximum of \$110 per day/night, of which no more than \$35 per day may be applied towards meals. Allocation is based on the number of days of professional leave awarded plus weekend days, if applicable. **Total must not exceed \$440.**

Attendee Travel

This category applies to individuals attending a conference or event with no specific business obligations. Expenses are covered at the same rates as Participant Travel, but with a **maximum of \$550 per event.**

Institutional Development Travel

This category applies to individuals selected to attend a conference or training course that is identified as being of significant benefit to the institution, as well as to the person. It is anticipated that a maximum of six trips per year will be funded at this level

- Expenses are covered at the same rates as Administrative Travel.

Special Awards

The Professional Development Committee administers two special awards, the Junior Librarian Travel Award and the New Directions/Librarian III Travel Award. Application letters for these awards should accompany the A3.

The Junior Librarian Travel Awards provide financial support for professional development experiences to staff members who have been working five years or less as library professionals as of July 1st of the current fiscal year. They may be awarded for activities such as: attending a conference in order to become active in a national library organization; enrollment in an institute on a work-related subject; or a series of site visits to other institutions that will assist the librarian in current planning activities.

Each junior librarian is eligible for a total of two such awards. Junior librarians are contacted directly by PDC by letter, twice a year, and invited to apply for the awards. A short essay is required that details how the event would be of benefit to the staff member. Four awards have been granted each year.

- Expenses are covered at the same rate as Administrative Travel, to a total maximum of \$1000.

PDC awards two **New Directions/Librarian III Travel Awards**, one each half-year. These awards were originally made possible, in spring 1999, by a gift from the estate of Beatrice Rosenberg in memory of her aunt, Elizabeth Kamenetsky (SLS '15). The awards fund librarians of rank III for attendance at events that will provide new directions for the librarians' professional careers. The awards are not intended to fund standard professional conference attendance (for example, ALA), but rather conferences, workshops, site visits, or other events that will give librarians new views on their profession and work at CUL. Applicants are encouraged to think creatively.

Librarian IIIs are contacted directly by PDC by letter, twice a year, and invited to apply for the award. Each librarian III is eligible for one such award. An essay is required that details how the event would be of benefit to the staff member.

- Expenses are covered at the same rate as Administrative Travel (local ground transportation limited to \$50), to a total maximum of \$1500.

Travel and Staff Development Guidelines for Duke University Libraries

The following statements reflect the Library's continuing commitment to ensuring an equitable and meaningful approach to funding staff travel and to make the best use of limited travel funding. Library employees should take the initiative to seek out training and other opportunities to develop their job-related knowledge and skills. Likewise, they should pursue levels of participation in activities that will enable them to make contributions to the work of the Perkins Library System, the University, and relevant professional organizations. These guidelines are intended to supplement, not replace, University policies governing travel.

These travel guidelines apply to **all staff** ("all staff" refers to monthly and bi-weekly employees) of the Library, including those working part-time, on term appointments, and on grant funding that includes provisions for travel. Application may also be made for travel support for staff working on grants without provisions for travel, through their department head and/or Executive Group member.

CATEGORIES OF TRAVEL

Category One applies when the Library requires staff to travel to conduct or in support of the direct business of the Library.

This category of travel includes, but is not limited to:

- Attendance as an official representative of the Library at meetings of associations and other organizations in which the library holds an institutional membership
- Attendance at meetings where an individual has been designated to officially represent the Library
- Development/Fundraising: contact with outside funding agencies, meetings with donors, etc.
- Development of vendor relations: contract negotiations, demonstrations, etc.
- Site visits
- Training/Education required by the Library to acquire specific skills needed for essential functions of the position
- Acquisition of library materials or to arrange for such acquisition where normal means of acquiring materials are not available
- Other official Library business as defined by the University Librarian

Category Two applies when travel is undertaken at the initiative of the employee for the purposes of participation in professional associations, staff development and training/education.

This category of travel includes, but is not limited to:

- Conference participation: Defined as travel undertaken to present a paper or poster session, participate in a panel discussion, chair or moderate a session, serve as elected/appointed officer or committee member (or otherwise engaged in organization activities) of a professional library or scholarly association
- Travel by newly appointed staff: Defined as travel undertaken by a staff member with less than three years of library experience, or experience in a new position, to attend a meeting of a professional association
- Conference attendance: Defined as travel to a conference or meeting to broaden a staff member's perspective, to keep current in his/her field and in the profession as a whole, and to become involved in professional activities

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- **Training & Education/Staff Development:** Defined as staff-initiated travel to attend courses or meetings at which s/he will acquire skills to expand his/her knowledge or enhance his/her job performance. It is expected that training/staff development travel will be reflected in that employee's PEP

TYPES OF TRAVEL

Local area: Attendance at a conference, workshop or meeting within the RTP metropolitan area (Raleigh-Durham-Chapel Hill-Cary).

Out of area: Attendance at a conference, workshop or meeting outside the RTP metropolitan area.

FUNDING

Category One:

Local area: The full cost of registration for the conference, workshop, course or meeting.

Out of area: Full cost of transportation by the most economical means to the destination (includes ticket or personal mileage incurred to/from the destination) and the full cost of "early bird" registration, meals and lodging.

In order to be reimbursed, expenses must be detailed on the Travel Expense Form and receipts must be provided.

Category Two:

While staff development and participation in the profession is principally the responsibility of the individual staff member, the Library encourages such involvement by providing paid released time for approved Category Two travel along with some financial support.

Local area: The full cost of registration for the conference, workshop, course or meeting.

Out of area: Transportation by the most economical means to the destination (includes ticket or personal mileage incurred to/from the destination) and the full cost of "early bird" registration, plus a daily supplement to offset actual expenses for meals, hotel, parking (airport and destination) taxis, etc. An exception to this is when travel is not possible directly to the destination, ie a conference is in St. Augustine, FL, but the closest airport is Jacksonville. In this case, taxi, airport transport and/or a rental car may be authorized.

The supplement amount, based upon the travel purpose, will be determined annually prior to the start of the new fiscal year (Attachment A). In order to be reimbursed for the supplement, expenses must be detailed on the Travel Expense Form and receipts must be provided for an amount equal to or in excess of the supplement payable for the entire trip.

APPROVAL PROCESS

1. Submit *Administrative Leave Request* through supervisor to department head for approval and funding level/source (cost object, grant, etc). If the requestor reports to an Executive Group

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member, the leave request should be routed to that EG member for approval. If the requestor is not an EG direct report, then the department head is the authorizing official for the travel.

2. Authorizing official forwards approved forms to Area Support Center (ASC) to be entered into the Travel database. Once entered the original request is returned to requestor. ASC may keep copy of approved form for their file.
3. Once requestor has received approved *Administrative Leave Request* form they may proceed with making necessary travel arrangements.
4. Staff should notify their Department Head or Executive Group member and Business Services if there are any changes to a trip that was originally approved for funding.

TRAVEL ACCOUNTING

1. Travel arrangements should not be made until an approved Administrative Leave Request form has been received.
2. Receipts for airline tickets, registration, and/or other expenses incurred using a procurement card prior to actual travel should be submitted to departmental Paris administrator along with a copy of approved Administrative Leave Request form as soon as expense has been incurred.
3. Within **two weeks** of their return, employee should complete a Travel Expense Form and submit appropriate travel receipts to their Area Support Center (ASC).
4. ASC will review form and forward to the employee's department head or EG member (depending on who approved the travel) for approval.
5. ASC forwards approved form with receipts and copy of *Administrative Leave Request* form to Business Services for review and entering of final expense total into database.
6. Business Services returns documentation to ASC for processing.

REPORTING

It is expected that staff whose requests to attend special meetings or workshops are approved will share the benefits of their attendance with their colleagues in an appropriate form, i.e., 1) a written brief report describing the nature of their conference participation and its importance to the Library, which could be published in the IB or through e-mail; or 2) a verbal report at a departmental meeting, a meeting with interested parties, a brown bag lunch, etc.

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FY 2006/2007 Supplemental Payments for Category Two Travel

- Active Participation and/or Presentations at Conference: \$75/day
- Travel by staff with less than three years of library or position experience: \$75/day
- Conference attendance: \$40/day
- Training & Education/Staff Development: \$40/day

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Conference Funding for The Gelman Library Council of Librarians

Under the “D” (development) aspect of LRDC, the Committee has discussed its role in helping librarians “develop”, which is an aspect of promotion and at some ranks, continuing appointment.

Conference attendance and participation benefits Gelman and GW in these ways:

1. Brings new ideas to the Library. Helps the Library stay current.
2. Brings new ideas and “fresh thinking” to librarians.
3. Encourages professional development.
4. Assists individuals in promotion and continuing appointment.
5. Promotes the reputation of Gelman Library.
6. Promotes George Washington University.

The current formula of 33% in some ways is a dis-incentive rather than an incentive to be active in conference attendance and participation.

In order to create a support formula that encourages and rewards participation, LRDC proposes the following target funding for 1) new librarians and 2) all other conference attendance:

1. New Librarians

In order to encourage new librarians (defined as five years or less post-MLS experience) to become active in the profession, new librarians at Gelman will be eligible for one (1) full funded conference attendance grant in each of the first two years of Gelman employment.

2. Other Conference Attendance

100% funding When asked to attend by Gelman or when attending as the official representative of Gelman Library or GW;

90% funding Substantial contribution to the conference, such as

- Member of the Conference organizing committee;
- Attending as an officer of the organization (e.g., President of LITA);
- Making a major presentation (examples: keynote address, presenter at program which required acceptance by the conference, formal presentation, significant content session);
- Chair of a committee or chair of a section or equivalent level of responsibility;

75% funding Contribution to the Conference, but not as substantial as at 90% level, such as

Participant at the conference but in a more limited way, such as informal panel, or poster session;
Planning a program, but not presenting

60% funding Member of a committee

40% funding Attending for professional development or own edification

Covered expenses are defined as

For the 100% level, 100% of actual registration, transportation, hotel, transfer costs and food per diem

For other levels:

Registration

Transportation costs at an average rate that is reasonably available at a reasonable time such as quoted by the university travel agency and, for ALA, the ALA travel desk.

Average price conference hotel for a half a double rate, or other appropriate accommodations

Incidentals, such as taxi fares, airport transfers, etc.

Food per diem

Procedure for requesting funding:

Travel request form is submitted. Group leaders and AUL must approve and will make determination of funding and recommend a funding category. Final decisions are made by the Administration Group. This Group will resolve conflicting funding recommendations.

Obligations of attendees:

Regardless of funding level, the expectation is that conference and workshop attendees will bring information and knowledge back to Gelman Library and will share such information and knowledge with colleagues. Proposed method of sharing must be specified on the travel request form.

Effective Date: July 1, 1998 (FY99)

Accepted by Council: August 19, 1998

University of Georgia Libraries

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Travel and Funding Guidelines

[General Policy Statement with Definitions of Types of Funding](#)

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[Unexpended Funds](#)

[Procedure to Reserve a UGA Vehicle](#)

[Procedure to Request Reimbursement](#)

General Policy Statement

Staff and faculty training and development is a joint responsibility between the staff/faculty member and the Libraries. Individual staff/faculty are expected to take some financial responsibility for their own growth in knowledge and skill and also to take the initiative in identifying courses, workshops, conferences, and other educational, professional, or skills-oriented opportunities. Staff/faculty professional development is supported by the University Libraries through funding and/or release time from employment responsibilities. *Financial support for training, professional development and travel is based on the availability of funds.*

Types of Funding Areas

There are three types of funding areas: administrative, training, and faculty professional development. These are defined as follows:

- Administrative** activities are those for which one is asked to represent the University Libraries at a meeting, conference or other activity considered official business. Examples of administrative travel include the following:
 - o Representing the Libraries on user groups or boards, conferences, or other meetings of this type.
 - o Evaluation, inventory, or preparation for shipment of collections that have been purchased by or given to the Libraries.
 - o Negotiation with possible donors or sources for collections.
 - o Visitation to other libraries to relate the practices of another library for possible implementation at UGA.
 - o Meeting with other library administrators to conduct business germane to the functioning of the Libraries.
 - o Recruitment of Libraries faculty.
- Training** activities are usually career related, developing skills, knowledge and other qualifications which promote current awareness of advances in your field, or prepare you for additional assignments or positions within the Libraries. Training activities may also be related to current or future objectives of the Libraries in which case you may be invited to participate and asked to share skills learned with others.
 - o UGA Human Resources seminars which have a cost also fall into this category. Criteria for approving UGA Training and Development Seminars which have a cost include:
 - In most cases employees should have passed their probationary period.

Libraries Human Resources

[Employment Opportunities](#)

[Training and Development](#)

- Auditing of Classes by Employees
- Links to Resources
- New Employee Orientation
- Training, Conference & Travel Funding Guidelines
- Tuition Assistance Program

[Staff Resources](#)

[Libraries Events Calendar](#)

[Athens Information](#)

- Seminars should have direct application to their current job or possible future job
- There may need to be a limit per person per year

When requesting funding for a UGA Training seminar, complete the "UGA Training and Development Class Fee Payment Authorization" form http://www.hr.uga.edu/careerdev/fee_auth.pdf in addition to the [Training, Conference & Travel Funding Request](#) form. Forward both forms to [Becky Wortham](#) or [Connie Fuchs](#). Note the cancellation policy for UGA Training and Development Seminars <http://www.hr.uga.edu/careerdev/payinfo.html>. Those who fail to appropriately cancel a class may face consequences of not being able to take classes in the future.

3. **Professional development** activities are identified as those for personal professional advancement for Libraries faculty. This may include both attendance or more substantive participation at meetings, workshops, institutes, or conferences of professional organizations for the purpose of maintaining currency in the profession. The individual allocation for the fiscal year is determined as soon as possible following budget development, usually by June. Release time, subject to the limitation of maintaining schedules of library services to attend professional and committee meetings, is available to all faculty.

Funding Policy

Financial support for training, professional development and travel is based on the availability of funds.

1. Reimbursement for **administrative** activities is normally 100%. Travel under grants or contracts is considered "administrative" if it is chargeable to such grants or contracts.
2. Reimbursement for **training** activities can vary depending on the request.
3. **Professional development** activities are reimbursed by assignment of an equally distributed flat rate of funding each fiscal year. Decisions about which conference(s) to attend and what amount to spend on each are made by individual faculty members. In addition, a supplement in addition to the flat rate will be awarded to librarians who participate in a more substantive way than basic attendance. More substantive participation may include: presenting a paper, editing a publication, conducting a workshop, serving as an officer on a committee or participating in some other significant way in a meeting or conference.

A supplement must be expended for the conference for which it is awarded. Reimbursement for this category of travel is based on the amount the Libraries has designated that year to spend for travel. Funding for individuals under this category will not be affected by the availability of money from other sources, such as grants, compensation for teaching, or outside invitation.

Procedure to Request Funding and/or Permission to Travel

1. Complete the [Training, Conference & Travel Funding Request](#) for any type activity, regardless of whether-or-not funding is requested.
2. Route the form and any accompanying documentation or forms to the Department Head for approval and signature.
3. Route the approved form(s) to Becky Wortham or Connie Fuchs in the Libraries' Administrative Office for administrative approval and encumbrance of funds no later than **two** weeks prior to in-state travel; **four** weeks for out-of-state travel. Requests made after the deadline may result in rejection of the request.
4. Unless one is contacted by Becky Wortham or Connie Fuchs, one can assume that the request is approved.
5. When traveling out of state please complete the [Training, Conference & Travel Funding Request](#) form as you would for in-state travel and forward the form to [Becky Wortham](#) or [Connie Fuchs](#) in the Libraries' Administration Office. Out of state travel requires the submission of additional travel authority forms which will be completed by [Connie Fuchs](#) or [Becky Wortham](#). Copies of the completed additional travel authority forms will be emailed to you.
6. When staying overnight while traveling in-state, please remember to present a [State of Georgia Exemption of Local Hotel/Motel Excise Tax](#) form to Georgia Hotel/Motel operators.

Unexpended Funds

Funds are allocated on a fiscal year basis. If the flat rate of funding is not expended in one year, it cannot be carried over to the next fiscal year.

Procedure to Reserve a UGA Vehicle

For all requests, complete the [Request for UGA Vehicle form](#) and forward the form to [Becky Wortham](#) or [Connie Fuchs](#) in Libraries' Administration.

1. You must use a UGA vehicle for travel, unless a vehicle is not available. Check with [Becky Wortham](#) or [Connie Fuchs](#) on availability.
2. If you must use your personal vehicle (a UGA vehicle is not available) the mileage rate is reflected on the current [UGA Travel Expense Statement](#).
3. If you use your personal vehicle when a UGA vehicle is available the rate is reflected on the current [UGA Travel Expense Statement](#).

Procedure to Request Reimbursement

Within two weeks of completing travel, a [Travel Expense Statement](#) must be completed and sent to [Connie Fuchs](#) in the Libraries' Administrative Office. In completing these forms for the University policies regarding travel, per diem, etc., attention is directed to the [University of Georgia Travel Regulations](#).



Last Updated: 9/22/2009
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<http://www.libs.uga.edu/humres/training/travelguidelines.html>



Faculty Development Allocations Committee

[FDAC Home](#)

FY 2010 Professional Staff Development Fund Guidelines

FY 2010 Allocations

Rank	Amount
Tenured and Tenure-track faculty:	\$1500
Clinical faculty:	\$1000
Academic professionals:	\$750
Full-time visiting appointments: (includes residents, professional library associates):	\$500

Guidelines:

1. The faculty funds will be administered by the FDAC. The academic professionals and visiting appointment support will be handled by the University Librarian.
2. Funds are FY2010 and cannot be carried forward after June 30, 2010. All unspent monies revert to the library administration.
3. Faculty should apply for funds before they travel or make other expenditures, and they should make every effort to expend funds or tell us of the intent to use funds (e.g., ALA annual) by June 1, 2010.
4. Allocations for the fiscal year are pro-rated for faculty members and academic professionals who start their appointments on or after October 1 or who resign their positions prior to April 1. For faculty members and academic professionals with less than full-time appointments, FDAC funds will be apportioned accordingly.
5. The Library Business Office will monitor each staff member's allocation. Staff members may ask for itemization from time to time to review their balance, and may call errors to the attention of the Business Office staff. If there is a difference that cannot be resolved, the records of the Business Office are the official record.
6. All activities must be approved as bona fide professional activities by the FDAC and the University Librarian. Funding amounts are determined by the staff member.
7. The funds may be used to support professional travel, conference attendance, research or purchase of equipment for the individual's research or professional work; note that all equipment is the property of the library and must be surrendered upon separation from the university. Equipment purchases will be coordinated and selection of brands restricted by library policy. Equipment prices are guaranteed as maximum prices. Any savings realized through bulk purchases or rebates will be passed on to the 'buyers,' and increased prices, surcharges, shipping costs will be absorbed by the Library. Any added features, peripherals, memory requested by the buyer will however be charged to the staff member's fund.

8. Items eligible for funding include: professional dues, certification costs, registrations, airfare and ground transportation, hotels, per diem, students' hours for research, photocopying and postage above the nominal amounts, support by library administration, publications, software, equipment and peripherals (brands determined by library), telecommunications costs and continuing education. All normal university and state business policies apply to these expenditures. *If* the hotel in which you stay is *not* a conference hotel *and* the cost exceeds the lodging allowance, the faculty or staff member must provide a travel exception request signed by their unit head. See the details on [OBFS News & Announcements](#). Also, see the [Lodging Allowance Rates](#).
9. To reduce processing of reimbursements, the library prefers to pay for the item on behalf of the faculty/staff member rather than reimburse the faculty/staff member. The Library's MasterCard can be used by the Business Office for most purchases including conference registration. To take advantage of this possibility, complete the necessary paperwork, except for the credit card and signature information and submit the paperwork (or Web printout) to lib-bus@uic.edu with your FDAC or University Librarian approval. Payments are usually processed within 5 days of the completed request being received.
10. If a faculty or staff member makes arrangements to attend a conference and then is not able to attend, any conference or airline cancellation penalties must be paid out of the faculty or staff member's personal funds. FDAC funds cannot be used to cover cancellation fees.
11. A faculty or staff member may not delegate their funds to another faculty or staff member. If a faculty or staff member will not use their funds in a given year, the funds will return to the library but will not be redistributed to other faculty or staff members.
12. Joint equipment purchases are not permitted but research expenses (such as poster expenses or student hours) may be shared by two or more faculty or staff members. Research expenses can be shared in any manner specified (i.e., a 50/50 percent split or a 75/25 percent split.)
13. REMINDER: Effective July 1, 2006, reimbursement vouchers submitted more than 60 days after the completion of travel or the expenditure occurrence will be reported as taxable income unless a Reasonable Justification form has been submitted and approved by University Payables. The reimbursed amounts will be subject to federal withholding of 25%, state withholding of 3% and, if applicable, Medicare withholding of 1.45%. This withholding will reduce the amount of the employee's net income in a subsequent pay period. For more information visit the [OBFS Travel Reimbursement page](#).

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URL: <http://www.uic.edu/depts/lib/staff>*

[STAFF PAGES HOME](#)

University Library
University of Illinois at Chicago
801 S. Morgan, M/C 234
Chicago, Illinois 60607 USA
Administration: 312-996-2716

ISU Library Travel Policy

PURPOSE

The purpose of this policy is to support the Library in conducting its work and the active participation by the library faculty and staff in professional meetings, workshops, and seminars that will be beneficial to the University, the Library, and to the individual staff member. Library travel and reimbursement for travel are subject to general University-wide regulations as well as specific Library regulations. [Complete information regarding University regulations](#)

FUNDING

It is the policy of the Library to support work-related travel as fully as possible within budgetary limitations and without significantly impairing library operations or services. All funding amounts are established by the Library administration and allocated on the calendar year. Encumbered allocations carry over to the next calendar year for final payment. Unspent allocations do not carry over to the next year.

TYPES OF TRAVEL

The following categories comprise the travel support program:

A. Faculty Professional Development and Research Travel

- **Faculty** travel that promotes professional growth, professional knowledge and/or permits the individual to contribute to the profession
- Conference and library-related professional organizations (e.g., ALA, ILA/ACRL, SLA, etc.) or subject-based organizations
- The annual budget allocation also provides financial support for faculty research projects as overseen separately by the Travel and Research Funds Committee
- Faculty requests are submitted through and approved by the Travel and Research Fund Committee who will solicit information about individual travel plans and research projects for the fiscal year
- Individual funding allocations for travel are based on the following:

Level I

General Library Faculty travel base funding - \$1,000

Level II

Faculty members who:

- a. are officers of state or regional groups, or
- b. present a paper/poster at state or regional meetings – an additional \$400 or \$1,400 total

Level III

Faculty members who serve on national/foreign committees – an additional \$600 or \$1,600 total

Level IV

Faculty members who:

- a. are untenured, or
- b. chair a national/foreign committee, or

- c. present a paper/poster at national/foreign meetings, or
- d. are elected officers of national/foreign groups – an additional \$800 or \$1,800 total

B. Staff Development Travel

- **Merit and P&S** employee training and travel fund administered through the Staff Development Advisory Committee
- Denotes need for training/updating skills
- Requests submitted throughout the year as announced and will be considered until budget funds are exhausted
- Funding and release time must be approved by immediate supervisor, department head, and AD (see Travel Procedures and Guidelines) and will adhere to all appropriate union contract rules
- Full or partial reimbursement based on yearly funding and criteria established by the Advisory Committee (see Staff Development Advisory Committee on Intranet)
- Funding may also be used for training opportunities brought into the Library

C. Business Travel

- **All faculty and staff** travel undertaken as a requirement of the position, the faculty and P&S recruitment process, or because of the value or need of such travel to the Library in conducting its work
- Educational and professional opportunities to improve/conduct the Library's work and/or meet departmental/library operational goals. Funding may be used for training opportunities or speakers brought into the Library. Examples include:
 1. IT/computer/systems training
 2. Workshops and training directly related to position responsibilities or special assignments
 3. Recruitment and diversity
 4. Conducting library/departmental work
 5. Board of Regents/inter-institutional or state-wide activities representing the library
- Annual allocations are determined by the library administration
- Each division is also allocated a focused operational travel budget to fund travel and staff development opportunities (e.g., local workshop fees, partial funding for staff development proposals, and matching funds for larger business travel requests). The ADs are responsible for managing these budgets.
- Staff should be vigilant in looking for external funding opportunities (full or partial) through liaison departments, grants, or other outside sources
- Approval of business travel requests will be based on the following:
 1. Benefit to Iowa State University. Enhancement of the library's ability to support the teaching and research goals of the university
 2. Relevance of the event to the person's job responsibilities or special assignments
 3. Direct benefits to the library or the academic liaison department
 4. Support of supervisor/department head/AD
 5. Meeting more than one of the above criteria will increase chances for reimbursement

D. Administrative Travel

- **Dean's, Administrative Cabinet's, and library development activities and travel**
- Required by position assignment, special assignment representing the library, conducting the business of the library, or the library development program. Or, supports personal professional service and/or research activities.
- Can be requested, but is designated by the administration

TRAVEL PROCEDURES AND GUIDELINES

- A. All travel requests must be submitted for approval by completing the "ISU Library Travel Request Form for Faculty and Support Staff." (See Intranet > Forms > Travel Request) On-campus, free workshops/seminars, consisting of less than four (4) hours of work time do not need a Travel Request Form but must have supervisor approval
- B. Staff must apply for funds **before** traveling – without prior approval, purchases with personal funds will not be reimbursed
- C. Staff should submit completed Travel Request Form to the Dean's office staff at least two (2) weeks prior to travel (all authorizations must be noted)
- D. Completed Travel Request Form and registration form should be submitted to the Dean's office staff for pre-payment of registration fees, three (3) weeks prior to the registration deadline
- E. Staff requesting travel money must address the purpose of the travel – "place visited, purpose of trip and nature of involvement" on form. Funding levels are dependent on nature of travel and established criteria
- F. The University Library generally follows established University guidelines for reimbursement of travel expenses – **please work with the Dean's office staff and the Web Travel system for specific reimbursement questions prior to travel.** For assistance calculating mileage, see the university's [Mileage Guide - Iowa](#) or [Mileage Guide - Out-of-State](#).
- G. Once travel has been approved, you will receive a notice of approval or denial of funding (if requested), and what **original** receipts will be required for reimbursement
- H. Travelers should submit reimbursement receipts to the Dean's office staff within five (5) days of travel
- I. All staff receiving travel money for training or professional development should expect to report back to their department or staff at large any knowledge or expertise gained
- J. Staff who have received approval but do not travel, should notify their department head, AD and the Dean's office as soon as possible so funds can be recovered.

Approved by Dean's Council 9/14/05

Approved by Dean of the Library 9/15/05

Policy and Procedures for Funding Travel/Professional Activities

The MIT Libraries place significant value on the growth and development of its professional/administrative staff. It is expected that librarians, archivists, and administrative staff will take the initiative to develop their own personal and professional skills and pursue a level of commitment that enables them to make meaningful contributions to the work of the MIT Libraries, the Institute, and their profession. The MIT Libraries provide support and encouragement for professional growth through established career path guidelines (in the case of librarians and archivists), counsel from senior professionals, and some level of financial support for appropriate training, development, and professional participation.

This policy has been updated to reflect the current financial climate and resulting cuts to the Libraries' travel budget. It also attempts to dispel misconceptions, standardizes practices that have been taking place informally, and institutes new features based upon staff input and current practice at similar institutions. This policy also represents an effort to allocate travel and development funds both wisely and equitably.

The MIT Libraries' Travel Policy is based on parameters set forth in the MIT Travel Policy.

Guidelines/justification for requests: Before initiating travel/activity requests, staff must discuss their plans with appropriate supervisors or department heads. When approving requests supervisors, department heads, and associate directors will consider and weigh factors which include but are not limited to:

- The potential impact of the event on the staff member's professional development
- Career development planning outlined in performance reviews or promotion plans
- The potential impact of learned skills or knowledge on the MIT Libraries, both locally and system-wide
- The potential impact of the staff member's absence on department activities and other department staff
- The amount of travel (funding and release time) the staff member has engaged in over the past year

An annual dollar cap of \$1350 per professional staff member has been set for FY10. Financial support for professional activities undertaken between July 1, 2009 and June 30, 2010, both local and non-local, must be managed within this dollar cap. All requests must be justified* and supported by appropriate local administrators in order to be eligible for funding, and requests forms must be received and approved PRIOR to participation in the event. Expenses incurred without prior approval will not be reimbursed.

*An informative and compelling justification must be provided for each trip (in the "Justification for Attendance" section of the Travel/ Professional Activity Request Form). While this statement may be relatively brief, travelers are required to document their active involvement in or attendance to the event. Useful information here would be: 1) as member of ____ committee, will attend meetings to ____; 2) will attend [*insert specific program title*] to learn more about ____ for my work on ____; 3) will use opportunity to informally meet and network with other professionals who are working on ____ to determine best practices, new models, ____, etc.; 4) will be presenting a paper or poster session on ____; 5) will visit vendor exhibits to learn more about ____; etc.

The \$1350 dollar cap applies to activity in FY10; the cap will be reviewed and adjusted for the following fiscal year if appropriate. This spending cap approach has been implemented in order for the Libraries' to plan and manage the travel budget responsibly within tighter financial constraints and to ensure equitable distribution of funds among eligible staff.

There will be a small pool of funds available to accommodate extenuating or special circumstances associated with professional development funding requests that may exceed the per person cap, or for unanticipated or unique opportunities that may arise after an individual has met his/her spending limit. Approval for these types of occurrences must still be requested using the MIT Libraries Travel/Professional Activities Request Form. The requestor must provide an explanation for requesting funds over and above the individual dollar cap in the "justification" section of the form.

Levels of participation: Participation in an event may be described as either 'active involvement' or 'attendance.' *Active involvement* describes activities or roles such as committee officer or member, panelist or presenter, poster session presentation, program planner, etc. *Attendance* describes activity supporting early career development, exposure to current issues and best practices, and elective skill development. Active involvement will be funded as a high priority. However, attendance is acknowledged to be of vital importance to professional growth. For example, entry-level staff need time to become engaged in organizational work. Also, an event such as a subject specialist's academic organization may be attended for its informational value. A balance between active involvement and attendance should be represented both in individuals' career development plans and in the allocation of travel support across the system.

Paid release time: All approved professional activities and associated travel, including transit days, which occurs on traditional workdays, is treated as paid release time. Release time is provided for approved travel even when funding is not needed or granted.

Covered expenses: Allowable, reimbursable expenses for which the professional activities/travel dollar cap may be used are:

- **Registration.** Normally, registration is reimbursed at the membership rate. However, membership in an organization cannot always be expected. Subject specialists, systems staff, and others may attend events, which are not library-based but relevant to their jobs. In such cases, non-membership rates may be funded.
- **Transportation.**
 1. Airfare. It is expected that 'lowest available airfare' will be sought. Business class fares may be considered for professional travel only in extenuating circumstances. Contact the Libraries' Financial Administrator in advance of making reservations to see if circumstances meet the criteria and funding parameters.
 2. Rail. Train travel is an approved alternative to air travel and travelers may elect to business or coach class. However, reimbursement of the train fare will be capped at the cost of a reasonable roundtrip airfare between Boston and the event location.
 3. Auto. Use of personal vehicles will be reimbursed at the standard Institute rate per mile, plus parking and tolls. If requesting funding approval for the use of a rental car, contact the Libraries' Financial Administrator in advance for information about Institute restrictions.
- **Other ground transportation.** Transportation to and from airports, including reasonable tips, and airport parking, is reimbursable up to \$30 per event.
- **Accommodations.** Hotel and other accommodations are funded at a maximum of \$100 per night. In general, a four-night maximum is acceptable. If organizational

duties justify additional nights, they may be requested; an explanation of the need to exceed the maximum lodging allowance should be provided.

- **Internet Access Fees.** Online access fees incurred for business purposes will be covered, per day, as reasonably assessed by the hotel or other provider.
- **Agent Fees.** Fees for travel agents may be reimbursed.
- **Extra Bag Fees.** Fees charged by airlines for extra baggage may be covered.
- **Telephone Calls.** Telephone calls are not covered for domestic travel. For international travel, one telephone call per week is covered.

Not funded: Meals, receptions, tours.

Travel advances: Expenses that may need to be paid in advance may be requested (see MIT Travel Policy).

Local events: Events that take place within the Boston Metropolitan Area will be funded within the individual cap. Typically, registration, transportation and parking fees are covered. Overnight accommodations are not covered unless an applicant can justify the need for an overnight stay (e.g. officer or planner in charge of an event, very early morning start time, etc.).

International events: With proper justification, travel outside North America is eligible for funding. Many foreign destinations are sometimes less expensive than domestic locations. However, international trips that incur especially high expense may receive only limited funding.

Supplemental Department Funding: In some circumstances, Department Heads may elect to provide supplemental funding to staff for expenses not covered or only partially covered by the Libraries' travel budget, expenses not normally covered under the Libraries' travel policy, expenses that exceed the per person dollar cap or side-trips or site-visits. The Libraries' Financial Administrator should be consulted in advance to ensure that expenses proposed to be covered by individual department funds are allowable under the MIT travel policy.

Combining Personal/Leisure with Library-Funded Travel: It is possible to combine personal or leisure travel with travel that is undertaken at the Libraries' expense. However, it is important to contact the Libraries' Financial Administrator prior to submitting the "Travel/Professional Activities Request Form" to clarify restrictions and determine logistics and appropriate procedures.

Trip changes and cancellations: Penalty fees will be covered by the Libraries when changes or cancellations result from family emergencies, workplace demands, or other unavoidable circumstances. The requestor will cover penalties that result from a simple decision not to attend an event. It is the responsibility of requestors to notify the Financial Administrator about cancellation or significant funding-related changes.

Requesting Funding and Approval: The "MIT Libraries Travel/Professional Activity Request Form" is available in both .pdf and Excel formats on the Administrative Services page of the staff web, under the Travel section and the Forms section. This form should be used for all support requests; instructions are included.

1. The form should be completed and then routed via e-mail to department heads and associate directors for approval, ultimately ending up in Administrative Services via travel-lib@mit.edu.

2. It is important to provide specific and compelling justification for events as this is the basis on which Department Heads and Associate Directors will approve requests.
3. Associate Directors in approving requests will also confirm/ designate the appropriate travel type.
4. Administrative Services will assist in tracking individual spending cap balances

Requesting Reimbursement: Reimbursement should be requested using the standard "Travel Expense Voucher". Individuals have the option of managing their own allowable expenses within the dollar cap and may not necessarily request reimbursement for all incurred expenses. Individual caps will be monitored in Administrative Services and expenses deducted from individual "accounts" according to the Travel Vouchers submitted.

Revised 06/15/09

Revised 02/11/08

Approved by Library Council 6/5/02

NCSU LIBRARIES TRAVEL AND TRAINING GUIDELINES AND PROCEDURES

July 2008

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I. Purpose and Eligibility

The NCSU Libraries encourages professional involvement and work-related development for library staff. Continuing development and education benefit the Libraries, the university, the profession, and the individual. Travel funding and release time provide support for this facet of a dynamic library program. Travel must be in accordance with state and university policies.

Library personnel may request funds to provide assistance to attend professional conferences, workshops, courses, seminars, symposia, etc. (the term "meeting" will be used in this document to refer to all of these events). Employees in regular positions who have at least half-time appointments are eligible to request travel support. Support for professional development that requires international travel is normally limited to reimbursement of registration. The Libraries does not support travel within 3 months of an employee's separation from the NCSU Libraries.

Those requesting funding and/or release time for travel must demonstrate that meetings attended are work-related and will enhance job performance, competence, or professional growth. Because the benefit of the experience is shared by the Libraries and the individual, and because funds are limited, the cost of travel for development is usually shared by the individual and the library. Travelers are expected to exercise the same care in incurring expenses that a prudent person would exercise if traveling on personal funds. Excess costs, circuitous routes, upgrades and luxury accommodations, as well as costs incurred for convenience or personal preference, will not be funded.

Non-exempt staff attendance at training and development meetings must be strongly related to position responsibilities, as time attended is considered time worked under the Fair Labor Standards Act. Non-exempt employees must include travel time to and from meetings as time worked. Non-exempt staff and supervisors considering requests for travel authorization outside the Triangle should consult with Personnel Services for guidance on calculating and recording time worked to prevent unauthorized accrual of overtime.

Essential travel: Occasionally, due to budget constraints, travel may be restricted to that which is considered essential. The Libraries considers travel to be essential when the requester is the chair, officer, or member of a major committee or of the sponsoring organization; is listed as a speaker or awardee on the published program of a professional meeting; is attending a meeting that has been approved as a primary meeting; or when the sponsoring agency is covering the traveler's expenses. The state or the university may impose more restrictive limitations.

II. Categories of Travel

Administrative Travel	Travel to serve as an official representative of the Libraries as authorized by the Vice Provost and Director of Libraries.
Digital Library	A subset of Administrative Travel, to further digital library programs and services.
Fellows	A subset of Administrative Travel to support NCSU Libraries Fellows. ALL Fellows travel and training must be paid from this stipend; Fellows are not eligible for other travel/training categories. See Appendix 2 for Guidelines.

Training	A subset of Administrative Travel for training in skills that are directly related to an employee's current position.
IT Training	A subset of Training, to further information technology services.
Distance Learning	Training and travel for Distance Learning initiatives and projects.
Developmental Travel	Travel that is beneficial but not critical to maintaining library operations and that is integral to the Libraries' strategic directions. Meetings for staff members to gain new knowledge, deliver papers and presentations, participate in panels, manage workshops, or serve as organizational officers, chairs, or committee members. The minimum for reimbursement for exempt staff is \$20; travel with expenses less than \$20 should be treated as Release Time Only. There is no minimum reimbursement for non-exempt staff.
NC LIVE	Training for NC LIVE staff and projects; restricted to staff paid from NC LIVE budget or working in an official capacity for NC LIVE.
Regularly Assigned Duty Travel	Travel by those in positions whose regularly assigned duties require travel, <i>e.g.</i> , travel to evaluate collections for potential donation, travel to deliver instruction to NCSU distance learners, travel by NC LIVE staff to member libraries. Employees in such positions should complete a blanket authorization request at the beginning of each fiscal year. <i>See Appendix 3 for Guidelines</i>
Release Time Only (RTO)	This category applies to exempt staff only for work-related travel that does not require the use of leave, but for which there is no reimbursement of expenses.

III. Review and Approval of Travel Requests

The Libraries Travel Request Form must be completed in its entirety and submitted with **all** required documentation in order for an employee to receive authorization to travel (except for Regularly Assigned Duty travel). The requestor should submit the form at least three (3) weeks before travel begins, to allow adequate time for the review process, registration, and to ensure best airfares. Travel without prior approval through all levels may make the employee personally liable for all costs associated with the travel.

In general, travel requests pass through the following review process: 1) department head, 2) assistant/associate director for division, 3) Library Travel Committee (LTC) (Developmental only) *or* AD responsible for funding source, and 4) Director of Libraries. Reviewers should route requests promptly to assure that travelers can take advantage of early registration, airfare, and lodging options.

Supervisors/administrators will review requests to determine the benefit of travel to the Libraries and to the individual, and to consider the effect of travel on departmental

staffing and divisional needs and priorities. Each reviewer certifies that s/he has verified that all required documentation accompanies the request, provides comments, and indicates the priority level of the request and whether it is or is not supported. Once the review process is completed, the applicant will be notified of the action taken by return of a copy. With the exception of library-assigned travel, expenses are approved on a line-item basis unless otherwise noted. **Employees will be responsible for expenses that exceed approved amounts.** If circumstances beyond the traveler's control increase the anticipated cost of travel beyond any approved 20% revision to airfare expense as described in Section V, the traveler should contact his/her department head or assistant/ associate director immediately AND submit a revised Travel Request Form.

Note: Finance and Business will not incur any expenses (such as pre-paying airfare or registration) until an approved Travel Request Form (with all signatures) is on file.

Type of Travel	Approvals Needed, Based on Type of Travel				
	Dept. Head	AD for Unit	Asst/Assoc. Dir. Responsible for funding source*	LTC**	Director
Administrative, Digital Library, IT Training, Fellows, NC LIVE, Distance Learning	X	X	X		X
Developmental	X	X	X	X	X
Training	X	X	X		X
Release Time Only	X	X			X
Regularly Assigned Duty	X				

*Administrative – Vice Provost and Director of Libraries
 Digital Library, IT Training, – AD for Digital Library
 Training, IT Training, Developmental, Fellows – AD for Organizational Design and Learning
 Distance Learning – Deputy Director
 ** LTC - consult the NCSU Libraries Intranet to determine the current chair of the Library Travel Committee

IV. Guidelines for Expenses

Staff are expected to seek the most reasonable fares and accommodations, allowing for safe travel. Guidelines apply to "normal and predictable" types of travel. In cases where an urgent need does not permit planning in time to receive reduced fares, or in case of an emergency that necessitates excessive or unusual cost, a thorough explanation of circumstances is required.

A. Transportation. Travel should be by the most economical, direct, and usually traveled route and method.

-- **Air fare** should be at the best available advance purchase coach rate. Travelers who prefer to have tickets paid directly by the Libraries may book tickets through the Libraries' approved travel agent and may include the agent's booking fee. Travelers who purchase their own tickets may submit paperwork for reimbursement in advance of travel. Proof of completion of the flight is required after the trip.

--Employees may use a **state car or personal car** for travel within the state or to neighboring states when that is more economical than air travel. For out-of-state travel, cost comparison with air travel must include lodging and extra time away from work required when driving instead of flying.

--To estimate the cost of a **state vehicle**, check the University Motor Pool at Fleet Services, <http://www.ncsu.edu/facilities/fac-ops/mp/index.php>.

--When the Libraries is paying for a state vehicle(s) to transport staff to a meeting, there will be no reimbursement to travelers who choose to use a personal car when space is available in the state vehicle.

--Family members (who are not library employees) may not travel in state vehicles without prior approval from the Vice Provost and Director of Libraries.

--Travelers are not normally permitted to request reimbursement for **rental cars** (See Appendix 1).

--Parking, toll charges, taxi/shuttle fares, and other related expenses must be requested and approved in advance.

B. Lodging. Travelers should seek safe and reasonable lodging. Lodging should be close to the meeting site, such as in a conference hotel, to reduce commuting expenses. When possible, rooms should be shared, but a supervisor may not share a room with a member of his/her staff. Expenses for family members or other non-library employees sharing a room are not eligible for reimbursement.

C. Registration. Registration fees will normally be paid/reimbursed at the **advance registration member rate**.

D. Meals. Reimbursement for meals may be requested in accordance with current state subsistence rates:
<http://www.ncsu.edu/policies/finance/travel/REG07.65.8.php>.

V. Revisions, Cancellations, Accidents

Due to the volatility of airfares, funders may designate approval of requested fare plus 20%. The traveler may then book the ticket at the fare available at the time travel is authorized, up to that amount. If the only flight available exceeds that amount, the

traveler must immediately notify the divisional AD to find out whether the Libraries will fund the excess cost of the ticket.

Funding for any other increases to projected and approved expenses must be requested in advance through a revised Travel Request Form.

If an exceptional/unavoidable situation occurs **during** travel that will increase the cost of the trip beyond that approved (for example, a flight cancellation forces the traveler to spend an extra night in a hotel), the traveler should contact, via phone and email, his or her assistant/associate Director and the Director of Finance and Business to explain the circumstances. Outside business hours, the traveler must use his/her best judgment in keeping with the reasoning of a "prudent person traveling on personal funds."

A traveler who **cancel**s an approved trip must **immediately** notify the department head, the assistant/associate director, and the Director of Finance and Business. If costs have been incurred by the Libraries (e.g., registration or airfare) the employee will make every reasonable effort to gain a refund. The employee will be expected to repay non-refundable expenses unless the cancellation was at the request of the Libraries, with prior approval of the Vice Provost and Director of Libraries. In the event of an accident, serious illness or emergency, the Director may use her discretion regarding payment of charges and penalties. To confirm cancellation, the traveler should return his/her copy of the approved Travel Request Form to Finance and Business. If the cancellation results in an unused plane ticket, reimbursement may be delayed pending use of the ticket at a later date for another approved trip, subject to repayment of any extra costs incurred in rescheduling.

All motor vehicle accidents involving university-owned vehicles and rental cars used for official university business must be reported to the police, NC State Insurance and Risk Management (<http://www2.acs.ncsu.edu/insurance/>), the Director of Finance and Business, and the rental car agency, no matter how small the cost of damage or who is at fault. See the Motor Vehicle Insurance and Risk Management Regulation (http://www.ncsu.edu/policies/finance/ins_risk/REG07.35.3.php) for information on insurance coverage for state, personal, and rental vehicles.

VI. Separation from the Libraries. Unless waived in advance (as indicated by the Vice Provost and Director of Libraries on the Travel Request Form), the Libraries expects employees who travel within three months of a voluntary separation to repay travel expenses.

VII. Library Travel Committee

The Library Travel Committee (LTC) is a standing committee that administers the Libraries' **Developmental** Travel budget. LTC members review all requests in the category of Developmental Travel. The Assistant Director for Organizational Design and Learning (ADODL) is the Directors Council liaison to the LTC. The ADODL informs the committee of the total amount of developmental travel funds expected to be available for the fiscal year.

Committee Composition/Eligibility. The LTC is composed of five librarians, elected to staggered three-year terms by the library faculty. All library staff holding regular EPA appointments, with the exception of members of the Directors Council, are eligible to serve and to vote on the LTC.

Elections. Elections are conducted each February by the NCSU Librarians Association. Nominations must be submitted to the Librarians Association by the end of January (self-nomination is encouraged). Voting is by secret ballot. All terms are for three years (July 1 through June 30). If a seat is vacated before the end of a term, a special election will be held for a replacement, who will serve the remaining term. The LTC elects a committee chair annually from among its members.

Meetings. The LTC meets quarterly or more frequently if deemed necessary by the chair. The LTC meetings are closed, and discussions held in confidence. Travel requests are reviewed regularly by the committee. Information about LTC meeting dates is issued by the LTC chair.

Funding Priorities. The LTC will consider applicants' purposes for traveling, previous awards, expected benefits for the Libraries, number of staff attending the same meeting, and other pertinent factors in making its recommendations. The LTC bases its decision on the following priorities (in order):

1. Those presenting a paper or address, those with workshop, training, or teaching obligations, and panel members.
2. Those who hold organizational office or are committee chairs.
3. Those who are committee members or those attending workshops or courses pertinent to providing important and up-to-date library services.
4. Those attending a primary professional meeting in their discipline.
5. Those attending meetings for professional development.

The LTC may give special consideration to those who have not previously received travel funding.

Funding Formula. The LTC reserves the right to differentiate proportions funded, based on library priorities.

This document is maintained by the Libraries Office of Personnel Services
Revised 07/22/08 WLS

Travel Policy

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POLICY

Professional involvement by exempt staff is important to the Northwestern University Library. Attendance at and participation in professional meetings is recognized as beneficial to the Library organization and to the University as a whole. Making contributions to the field of librarianship and to scholarship, enhancing the collections and services at NUL and furthering cooperation with other libraries are important professional activities. Through its exempt staff, the Library seeks to influence and contribute to regional and national library developments that will enhance our ability to support the teaching and research goals of the University.

Therefore, the Library Administration is committed to assisting attendance and participation in professional activities to the maximum extent possible in order to enhance professional growth and development of the exempt staff membership. This assistance is given through financial support of travel and release time to attend professional activities. Professional travel should be viewed as the shared responsibility of the University Library and the staff member, and the individual is expected to share some of the costs.

GENERAL GUIDELINES

Professional travel includes attendance at and participation in professional workshops, institutes, conferences, seminars, and other specialized meetings conducted on a local, state, regional, national or international level; visits to vendors; visits to other libraries for the purpose of examining specific operations, applications, etc.

Funds allocated annually to the travel budget will be used to provide financial support for these professional activities. Each exempt staff member will be eligible for travel funding as described in this policy.

The travel policy should be reviewed by the Assembly at least every three years (or more frequently as needed); recommended revisions should be submitted to the Library Administration for approval.

The travel policy adheres to all University Travel Policy guidelines.

CATEGORIES OF TRAVEL

I. Administrative travel:

This category includes travel initiated by Library Administration for the purposes of conducting general library business and approved by the University Librarian. Up to full reimbursement of University-allowed expenses is given. This category includes:

- 1) Attendance as official representative of the Library at meetings of associations and other organizations in which the Library holds an institutional membership (e.g. ARL, CIC, OCLC)
- 2) Attendance at meetings where an individual has been designated to officially represent the Library
- 3) Professional development required by the University Library in training sessions which directly increase the Library's ability to perform its mission

- 4) Other official NUL business, such as:
- Contacting outside funding agencies or meeting with prospective donors
 - Development of vendor relations or
 - Site visits

II. Non-administrative travel

This category encompasses all professional travel not undertaken for the purpose of conducting general library business. This includes:

Conference participation and attendance: travel undertaken to present a paper or poster session, participate in a panel discussion, chair or moderate a session, serve as elected/appointed officer or committee member (or otherwise engaged in organizational activities) of a professional library or scholarly organization.

Professional development initiated by the staff member: travel to a conference, meeting, workshop, etc. undertaken to broaden a staff member's perspective, to keep current in their field and in the profession as a whole, to become involved in professional activities, or to promote, improve or enhance job-related skills.

“Blended” proposals, in which both administrative and non-administrative travel occur in one trip, can also be submitted. This might occur, for instance, if a staff member attending ALA also attended a pre-conference workshop directly related to job duties. If approved, the expenses for the pre-conference might be reimbursed as administrative travel, while the remaining conference expenses would come out of the staff member’s annual travel allowance.

PROCEDURES

Administrative travel:

Employees will be reimbursed for 100% of approved expenses for administrative travel. Reimbursement for local Administrative travel will include registration, transportation, parking and any meal which is a part of the travel.

Using the travel request form, all requests for Administrative travel must be approved by the staff member’s immediate supervisor, division head, and the University Librarian. This approval is for consideration of the necessity of the travel as well as the consideration of the time off. The employee should make every effort to turn in the request as early as possible. When approved, a copy of the travel request form will be forwarded to the Business and Finance Office by the office of the University Librarian. The employee approved for administrative travel will follow University guidelines with regard to air travel, car rental, hotel, registration, per diem for meals, and any other expenses related to travel.

Staff will notify their supervisor if not taking a trip for which approval was granted and notification will be conveyed to the Business and Finance Office.

Within four weeks of the completion of the travel, the employee should complete a travel expense form and submit appropriate travel receipts to the Business and Finance Office to obtain reimbursement. In accordance with University policy, the signature of a supervisor is needed in order to submit the request for reimbursement.

Non-administrative travel:

In order to support the autonomy of the individual professional and the department, financial support for non-administrative travel will be handled through an annual travel allowance. The amount of the travel allowance available for non-administrative travel will depend on the available travel budget and will be determined by the University Librarian in consultation with the Assembly of Librarians. A memo with the specific amount of the travel allowance will be sent to exempt staff in July for the fiscal year which begins September 1.

In addition to the base, additional funds are provided for one of the following:

- Librarians new to the profession will be given an additional \$200.00 per year for 5 years after completing the MLIS.

- Employees whose salary is in the lower 15% of salaries and who are not new librarians will be given an additional \$200.00 per year as long as the salary remains in the lower 15%.

Employees who are eligible for either provision will be notified of their status in the annual travel memo, which will include the total amount of the allowance (base + supplement) available to them.

All requests for non-administrative travel must be submitted using the travel request form. A request for travel may be made at any time during the year and is submitted to the immediate supervisor for approval. This approval is for consideration of the relevance of the travel as well as the consideration of the time off. Each eligible employee is free to use his or her travel allowance for any travel which:

- is relevant to the individual's employment;
- is in compliance with University guidelines for travel; and
- has been approved in advance by the supervisor.

Within the parameters of the travel allowance, employees are not limited to a specific amount of money per single trip provided the expenses for which reimbursement is expected follow University guidelines for travel. Exempt employees are free to choose to spend the total travel allowance on one trip or spread it over a number of trips. There is no roll over of funds to the next year nor is there borrowing from one year to pay for travel in the previous year.

Staff will notify their supervisor if not taking a trip for which approval was granted.

Within four weeks of the completion of the travel, the employee should complete a travel expense form and submit appropriate travel receipts to the Business and Finance Office to obtain reimbursement. In accordance with University policy, the signature of a supervisor is needed on the request for reimbursement.

International travel:

International travel is funded either as administrative or non-administrative travel, whichever is appropriate. Employees traveling internationally should use the procedure for the type of travel they are requesting, as described above. No extra funding will generally be available for non-administrative international travel. However, if the employee can demonstrate that part of the trip fulfills the criteria for administrative travel, the employee may submit a blended proposal for reimbursement of expenses for the administrative portion.

REPORTING

It is expected that employees who engage in travel for which there is either time off or funding given, will share the benefits of their attendance with their colleagues in an appropriate form such as a written brief report or a verbal report at a departmental meeting, a meeting with interested parties or other forum. Not all meetings, such as annual ALA meetings need to be reported on in detail, however, sharing relevant information from the ALA or other similar professional meetings is always welcomed.

Historical notes: Originally issued Dec. 15, 1976. Revised: April 30, 1993 and August 29, 2002. Issued as Policy & Procedure Manual p. 90-95A (Chapter II). Modified: August 29, 2002. Revision submitted to the Assembly for approval: April 2, 2007. Revisions approved by the Assembly: April 16, 2007. Administrative Committee approved Policy: June 19, 2007

Professional Development/Sabbatical/Short Leave Policies

Brigham Young University

FACULTY LEAVES POLICY

29 August 2005

PROFESSIONAL DEVELOPMENT LEAVE

Professional Development Plan

Professional development involves an ongoing plan to enhance professional expertise, increase creativity, and produce more proficient scholars and teachers. Professional development includes a balanced program of professional leaves, reading, improvement of teaching technique, innovative course development, creative work, research, artistic production and involvement in community service and/or activity in professional organizations. Upon returning from a Professional Development Leave, the faculty member is expected to provide a summary of his or her experience for the benefit of colleagues and other interested parties. Guidelines set forth by the department or college determine how and when this summary is to be presented.

Each faculty member should formulate a professional development plan. This plan may include Professional Development Leaves. The department chair should review the professional development plan as part of the faculty member's Annual Stewardship Interview. (See the [Rank and Status Policy](#), Section 3.1.4.)

Granting of Professional Development Leaves

Generally, a Professional Development Leave is approved for up to one year. Under special circumstances, a Professional Development Leave may be extended. The faculty member is guaranteed employment at BYU at the conclusion of a Professional Development Leave, unless terminated for cause. A request for Professional Development Leave requires written justification for the leave and initial approvals at the department and college levels. (Refer to the Leave of Absence Application form.) After the initial approvals are obtained, the dean forwards the request along with the written justification to the Associate Academic Vice President Faculty who determines if the request should be submitted for final approval. Final approval is granted by the President and the Office of the Commissioner of Church Education.

Purposes of Professional Development Leaves

Purposes which may justify the granting of a Professional Development Leave include:

A significant extension of professional knowledge, experience, or skills beyond those already possessed in research, creative activities, informational competency, or teaching ability,

A renewal of professional knowledge or skills in the faculty member's field,

Publication of scholarly or creative work or other exposure to an appropriately critical audience,

Attaining licensure, certifications, or an advanced degree recognized as the terminal degree in the faculty member's discipline, or one which would bring enhanced competence to the faculty member's assignment,

Opportunities for collaboration with scholars at other institutions or for consultation or employment at agencies or institutions which would enhance the faculty member's professional skills, stature, or productivity,

Opportunities for carrying out research or creative work at sites outside the university when this contributes to the quality of the work.

Written justification for a Professional Development Leave should include:

A description of the leave opportunity and its potential contribution to the expertise or productivity of the faculty member,

A description of the scholarly or pedagogical products likely to result from the leave,

A statement of likely benefits to the university, and

A detailed justification of any request for support funding.

Funding for Professional Development Leaves

University funding for Professional Development Leaves generally comes from budgeted funds allocated by colleges and departments. Leaves may also be supported with non-budgeted funds as appropriate.

Generally, a Professional Development Leave for one semester is funded by the university at full salary. Professional Development Leaves for two semesters normally are funded at half salary. ... Short-term Professional Development Leaves, including leaves during Spring and/or Summer term, which do not take faculty members away from campus, may be approved by the department chair and dean without submitting a formal Leave of Absence Application form.

Professional Development Leaves for which a faculty member's salary is funded by an outside source should not also include salary funded by BYU. However, faculty may receive university support in addition to that provided by outside sources for salaries, travel, relocation, or project costs not funded by the outside source when such support will prevent financial loss to the faculty member. Occasionally, an arrangement may be considered where the university and the hiring institution share the cost of the salary for the faculty member. The university will make a reasonable attempt within policy and available resources to facilitate Professional Development Leaves judged to have merit. The object is to make the leave possible as an investment in the faculty member's professional development and productivity. It is inappropriate for the

university to provide funding in addition to that available from outside sources if it results in a double salary, or in an unusual financial gain for the faculty member.

Benefits During a Professional Development Leave

Faculty members will qualify for full benefits during a Professional Development Leave approved and funded by the university. In cases where a faculty member receives salary and benefits from another institution during a Professional Development Leave, he or she should work with Benefits Services to make sure benefits can be fully reinstated without penalty upon return to the university. If a faculty member receives full or partial salary from another institution but not benefits, BYU benefits should be requested on the Leave of Absence Application form, and will normally be provided by the university. Time spent on Professional Development Leave will be counted as benefit credit for retirement purposes. Faculty members going on leave should contact Benefits Services to confirm whether the leave may impact their DMBA benefits.

Evaluation of a Professional Development Leave

Post-evaluation of Professional Development Leaves is essential. Each faculty member returning from a Professional Development Leave should submit a written report to the department chair. This report should refer specifically to the proposed objectives which led to the granting of the leave and show how and to what extent the objectives were achieved. Preferably, time in department meetings or special meetings should be given to report to the entire faculty of the department and other interested parties on the scholarly products and faculty development achieved as a result of the leave. Nevertheless, how and when the summary is to be presented should be determined by the department or college.

Rank and Status Implications and Salary Increases During Professional Development Leaves

As provided in the [Rank and Status Policy](#), Section 4.5, time spent on Professional Development Leaves is counted as part of the probationary period leading up to the final review for CFS. Thus, a Professional Development Leave does not stop the clock, or alter the schedule of rank and status reviews. A CFS review will occur on schedule even if a faculty member is on Professional Development Leave during the time of the review. The faculty member bears responsibility to prepare and submit the required materials prior to or during the time of the leave. A review for rank advancement may occur while a faculty member is on leave. When a Professional Development Leave is granted for the purpose of pursuing a graduate degree, consideration for promotion in rank will be given after, rather than before, the leave. A faculty member going on Professional Development Leave will receive the same increase in salary base as if the faculty member were not on leave.

Conflict of Interest During Professional Development Leaves

A faculty member on Professional Development Leave remains an employee of BYU, and he or she is bound by university policy, including policy governing conflicts of interest. A BYU faculty member shall not accept tenure nor agree to a continuing employment relationship with

another academic institution while on leave from BYU unless written permission to do so is given by the chair, the dean and the Academic Vice President. Otherwise, such an arrangement constitutes conflict of interest. (See the [Conflict of Interest and Conflict of Time Commitment Policy](#).) To enter into such an agreement with another university without such written permission constitutes a resignation of the faculty member's continuing faculty status and his or her employment.

Subsequent Employment Requirement

A faculty member granted a Professional Development Leave is required to return to the university for one year of regular employment immediately following the leave. Faculty members who choose not to return for a minimum of one year employment immediately following such a leave will be required to reimburse BYU for all associated costs paid by the university during the Professional Development Leave. Additionally, in such case, the Professional Development Leave will be counted as Personal Leave and the period of the leave will not count as benefit credit for retirement purposes. The university, at its sole discretion, may elect to waive the subsequent employment requirement. Authorization to waive the requirement is granted in writing by the Academic Vice President.

Professional Development Leave Partial

While uncommon, occasionally a professional development opportunity arises which only requires a part-time commitment and allows the faculty member to remain in the local area. Under these circumstances, a partial Professional Development Leave may be appropriate. Often it may be granted by the department chair and approved by the dean without having to follow the formal leave application process. The granting of a partial Professional Development Leave only requires the same approval process as a regular Professional Development Leave if the faculty member will be away from campus for a period of more than two weeks during a semester or term. (See the subheading, **Granting of Professional Development Leaves** in the **PROFESSIONAL DEVELOPMENT LEAVE** section of this policy.) A partial Professional Development Leave does not stop the CFS clock. (See the [Rank and Status Policy](#), Section 4.5.)

**UBC LIBRARY GUIDELINES FOR HEADS & SUPERVISORS IN
MANAGING AN EMPLOYEE'S DEVELOPMENT
Revised April 2009**

A. WHAT IS EMPLOYEE DEVELOPMENT?

Employee development can be broadly defined as a learning opportunity that enhances an employee's knowledge or work performance, contributes to career progression or results in personal growth.

There are numerous methods available for learning. These include: conferences, workshops, coaching, web-based learning, secondments and temporary promotions, and experiential learning.

The benefits of employee development include opportunities which allow employees to increase their knowledge and skills to meet the requirements of their position, to contribute to career progression, to network to exchange ideas and advice with other specialists in their field of expertise, to gain knowledge that would enhance their ability to respond to workplace demands and to obtain greater personal enrichment.

For UBC Library, having all employees engaged in both professional and personal development means having employees who are, engaged in the workplace, knowledgeable, competent, poised for new position opportunities and able to be more effective in their positions.

The Library is responsible for ensuring that all staff have ongoing access to relevant training opportunities. Each Branch Head or Unit Manager is responsible for assessing the training needs of their employees for the coming fiscal year and allocating the funds to meeting these needs.

Library Human Resources' role is to support training by acting as a resource to staff, supervisors, Branch Heads and Unit Managers.

B. HOW ARE NEEDS FOR A LIBRARY EMPLOYEE'S DEVELOPMENT GENERATED?

Needs for employee development may be identified in several ways including:

1. Employee initiated
2. Library initiated as result of changes in the position or operational needs.
3. Library initiated as a result of the performance review process
4. Library initiated as a result of organizational change.

1) Employee initiated

These training requests may include learning opportunities such as:

- Development of new knowledge or skills to enable advancement and promotion. This new knowledge and skill set may or may not be directly applicable to their current position.
- Exploration of a field of interest that may enhance performance in the current position
- Enhancement of knowledge and skills and work performance
- Personal growth
- Enhancement of well-being and wellness.
- Networking
- Presentation at a conference

In general, recreational courses are not funded however, if there is a component to the employee's request that will enable the employee to better perform their duties, it may be supported.

2) Library initiated as a result of changes in the position or operational needs

Generally, UBC Library provides employees with specific training required to be competent in their positions as well as when their job duties have been impacted by technology upgrades or changes in policies and procedures. Examples of these training activities would include:

- Safety and job orientation,
- Library policies and work procedures,
- Software upgrades

Some of these training activities are library wide and some of them may be specific to a division or branch.

3) Library initiated as a result of performance review process.

During a performance review, an employee's performance in a number of areas is assessed, position objectives are reviewed from the previous year, and new objectives are set for the coming year. A few ways in which employee development will be identified as a result of the performance review process include

- While establishing objectives for the coming year, the supervisor and employee may identify that training will be required to meet the set objectives and a developmental plan for the coming year will be developed.
- During the assessment of the employee's performance there may be skill and knowledge gaps identified. Training may be identified that will assist the employee in being able to bridge these gaps.
- The supervisor may ask the employee to identify their particular goals with regards to skills development.

4) Library initiated as a result of organizational change

The Library may identify a need for education and training as a result of significant organizational changes. These may include:

- System wide implementation of new technology or
- Changes in organizational structure that significantly impact on work flow and
- Changes in procedures, roles or responsibilities of staff.

C. HOW IS EMPLOYEE DEVELOPMENT FUNDED AT THE LIBRARY?

UBC Library funds:

Through the annual budgeting process, the UBC Library reserves a specific amount of funding to staff training and development.

A portion of this budget is allocated to use for library wide training initiatives such as people-centered training programs, system upgrade training, health and safety initiatives, software changes, policy compliance training. Library wide training initiatives and the corresponding budget is administered through Library Human Resources.

Additionally, each branch or unit receives a budget amount for employee training based on an equitable distribution of the Library's remaining training budget. These funds are to address specific employee development needs within each branch and not intended for library-wide training.

Lastly, discretionary funds are available through each AUL to support requests when other funding sources are not available.

Generally, training that is initiated by UBC Library will be funded by UBC Library. Individual requests by employees for training funds are to be considered on a case by case basis and are funded either fully or in part by the branch/unit or AUL.

Other funding sources:

Additional sources of funding are available to employees through their respective association/bargaining unit funds. In order to access these funds, the employee must make application following the established guidelines as outlined.

Some general information about each fund is as follows. More detailed guidelines pertaining to each fund are available on the UBC HR website www.hr.ubc.ca/odl.

1) AAPS Professional Development Fund

- Available to M&P employees.
- Subject to availability of funds, a maximum of \$750/employee per year (July 1 to June 30)
- Amount is pro-rated for part-time employees
- Employee must apply; applications cannot be made by the department.
- The employee's application is for reimbursement and must attach original receipts and include the supervisor's approval confirming that the application is eligible for professional development funding.
- Application is subject to UBC Human Resources review and authorization for reimbursement.
- To access funds, employee must follow procedures found at www.hr.ubc.ca/odl

2) 2950 Job Skills Training Program (JSTP)

- Available to CUPE 2950 employees
- Subject to availability of funds, a maximum of \$1,000/employee per year (April 1 to March 31)
- Employee must apply for funding approval
- The application must include the supervisor's authorization
- Application is reviewed by UBC Human Resources who will provide approval of funding and notify the employee.
- This fund is administered centrally by UBC Organizational Development and Learning and funding for the Library may be capped at \$20,000 per year depending on fund usage throughout the university.
- To access funds, employee must follow procedures found at www.hr.ubc.ca/odl

3) Faculty Professional Development Reimbursement Fund (PDR)

- Available to Librarians
- Entitled to \$500/year (July 1 to June 30th) for expenses related to professional development
- Unused balance at the end of each year will be added to the entitlement for the next year up to a maximum three year accrual or \$1500 maximum.
- Librarian must apply for reimbursement and must attach original receipts and include the supervisor's approval confirming that the application is eligible for professional development funding.
- Once approved, the Librarian will submit to Financial Services for reimbursement.
- Librarians must follow procedures found at www.hr.ubc.ca/faculty_relations/compensation/pdrfund.html

D. WHAT TO DO WHEN A TRAINING REQUEST IS RECEIVED?

Employees will be asked to submit their training requests to the Branch Head or Unit Manager. These requests should be in writing and include the following information:

- Type of training
- Dates the training
- Location of training
- Cost of the training – for example - registration fees
- Travel and accommodation costs
- Brief explanation on how taking this training will contribute to the employee's overall effectiveness and ability to perform their job

The Branch Head or Unit Manager will consider the employees request and provide approval to proceed, in considerations of the following factors:

- How will this support the employee's overall effectiveness and their ability to perform their job?
- How will this support the employee in building a set of transferable skills for career progression?
- Is the request part of the identified developmental plan as part of the performance review process?
- Is this training need something that will be addressed library wide?
- Does the branch have funding available to support the request?
- Will the employee be applying for funding through their respective development funds?
- Will the branch be able to meet its operational requirements if the employee attends training during normal working hours?
- Will the training be done on the employee's own time?
- If this specific request is not feasible, is there another way to meet the employee's need?
Consider brainstorming with the employee regarding a different methodology, location or time.
- How often is this learning opportunity offered? i.e. quarterly, annually.
- Where is the learning opportunity offered? i.e. Locally, rotating host cities.
- Consult with Human Resources, AUL or employee's supervisor if required.
- Coverage in branch/unit

Managers will advise the employee of the status of their request for training in writing. It is the UBC Library's responsibility to balance staff needs to the ongoing financial and operational objectives. Staff, heads, managers and AULs are encouraged to discuss ways in which requests can be accommodated. If the training request is not approved, the reasons for not proceeding with the request must be fully shared with the employee.

E. HOW IS AN APPROVED TRAINING REQUEST PROCESSED? HOW ARE THE BILLS PAID?

Once a training request is approved, an employee may proceed with registration for the training activity. Procedures for registration will vary according to the training provider. In most cases, payment is required in order to reserve a spot.

For payment to external training providers, an employee may:

1. Arrange for payment through the Library Finance Department
2. Pay first and apply for reimbursement through the Library Finance Department

For courses offered by UBC through Organizational Development & Learning or Continuing Studies, payment may be made by a Journal Voucher (JV); again arranged through the Library Finance Department.

In all cases, requests to process payment must be accompanied with the following:

- Manager's written authorization to process payment
- Amount of cheque including applicable taxes
- Cheque payable to
- Complete address of where the cheque is to be mailed
- Include completed registration form if is to accompany the cheque.
- Any additional receipts relating to the training claim.

A photocopy of receipts should be retained for personal record

F. WHAT IS THE ROLE OF LIBRARY HUMAN RESOURCES IN DETERMINING TRAINING?

Library Human Resources is a resource to staff, supervisors, Branch Heads and Unit Managers with respect to training. HR supports employee development by:

- Scanning the Library environment and identifying library wide trends and patterns for skill development
- Planning, developing and implementing programs to meet demand or as part of regular a Library initiative for on-going staff development and support.
- Acting as a resource to staff and supervisors regarding available career training resources.
- Providing advice and consultation for needs assessment, performance review.

G. BRANCH/UNIT RECORD KEEPING AND FUTURE TRAINING NEEDS OF THE LIBRARY

Annually, each branch/unit is required to submit an employee development summary to Library Human Resources reporting all training and development activities for the April 1 – March 31 period. This information will be used to form the basis of an annual report to staff and to Senate; to track trends in training and development; to inform discussions regarding library-wide future training initiatives.

A standard form has been developed to facilitate this record keeping and is attached to this guideline. Each employee should keep this information for use by their manager in preparing the consolidated report. Alternatively, the Head or Manager may choose to centralize the record keeping activities.

GUIDELINES FOR DISBURSING THE LIBRARIANS' SUPPORT GRANT FUNDS

Approved by the Bloomington Library Faculty Council

March 19, 1990

Amended by BLFC December 4, 1991; July 14, 1993; August 14, 1996;

July 3, 2000; April 3, 2002

Operational Guidelines:

1. The Bloomington members of the IULFC Sabbatical Leaves Committee shall constitute a Research Leave and Support Grant Funds Committee having responsibility for recommending awards from the Librarians Support Grant funds. Awards shall support research, professional development, and/or service. Teaching will not normally be supported, as tuition-producing courses are supported by the unit receiving the tuition income.

2. The term of service on this committee shall be the same as the term for the Sabbatical Leaves Committee. The Libraries' Fiscal Officer shall be advisory to the Committee.

3. Each year that there are funds to allocate, the Ruth Lilly University Dean of University Libraries shall inform the Committee of the amount of money available. The Committee shall invite librarians to prepare proposals for the use of this money and establish a deadline for receiving proposals and a calendar for reviewing them (hereinafter referred to as a funding cycle). Depending on the availability of funds, there may be more than one funding cycle in a calendar year. Currently there are four funding cycles, with deadlines **September 15, December 15, March 15, and June 15**.

4. The Committee shall review each proposal received and shall make recommendations for the amount of funding to be authorized. It is possible for the Committee to recommend partial funding for a proposal. The recommendations shall be delivered to the Ruth Lilly University Dean of University Libraries for implementation. Currently, the maximum award is \$750.00.

5. The Committee shall be responsible for monitoring and reviewing the use made of funds awarded in previous years, asking for reports and documentation, as needed. The Committee shall notify the recipient of the deadline date, two years from the date of the award, by which the grant money must be spent. The Committee shall prepare an annual report and evaluation for BLFC.

6. Use of the grant money is restricted to the purpose(s) for which the Committee awarded it. The Committee shall follow all University rules and regulations regarding the allocation of these funds and the disposition of equipment as stated in the latest edition of the University's Research Policy Manual.

7. Any Committee member who plans to submit a proposal for funding may not serve as a Committee member during that particular funding cycle.

8. Applicants shall be notified within one month of the funding-cycle deadline regarding the disposition of their application. Whenever possible, applicants should submit a proposal far

enough in advance to allow them adequate time to make plans dependent on the outcome of the grant. Applicants should attempt to avoid applying for grants that are needed within one month of the funding-cycle deadline.

Eligibility Guidelines:

1. Only tenured/tenure-track librarians in libraries on budgets administered by the Ruth Lilly University Dean of University Libraries are eligible to apply for support grant funds.

2. When appropriate, applicants should demonstrate that other available funding sources have been considered and/or approached.

3. Applicants should fill out the Librarians' Support Grant Form. This form requires a description of the project, a detailed budget, a statement of the project for which funding is requested, and other supporting information, including reports for past librarians' support grants.

4. Applicants may include letters of support from individuals who are knowledgeable about their project and/or other supporting documentation. They should also demonstrate that their proposal has the support of the appropriate supervisor if it requires a special commitment of resources from the department or unit where the applicant works.

5. Upon completion of a grant, a librarian is expected to provide a brief report, copies of which should be sent to the Ruth Lilly University Dean of University Libraries, the Libraries Human Resources Officer, and the Chair of the Research Leave Committee.

Categories of Support:

1. Seed support to develop a larger proposal.

2. Equipment or materials.

3. Travel, including grants for: a) research, b) attendance to one-time workshops or institutes, and c) presentation of papers.

4. Publication subsidies.

5. Library acquisitions needed to support the project.

6. Other needs not defined above, such as copying, secretarial services, preparation of graphics for publications, computing services, registration fees for workshops, interlibrary loan costs, postage, and telephone.

Priorities for Awarding Librarians' Support Grant Funds:

The highest priority shall go to requests for grants that serve as seed money to generate larger-scale grants, awards, or fellowships; that assist librarians to establish their reputations; that

are career-oriented in character; and/or that help the Libraries improve services. Multiple submissions within the same fiscal year will be accepted, but the second application must be made during the last funding cycle, i.e., for the May 15 deadline. If a second application is for an additional funding for a previous grant, it is important to indicate exactly what progress has been made in the meantime.

**IUB LIBRARIES
GUIDELINES FOR RESEARCH LEAVE PROGRAM**

Approved by the Bloomington Library Faculty Council: March 19, 1990

Amended by BLFC: July 14, 1993

Amended by BLFC: June 18, 1997

Amended by BLFC: July 3, 2000

1. The Research Leave Program is organized and run by the IUB Libraries as an internal program in support of the on-going research of librarians in libraries on budgets administered by the Ruth Lilly University Dean of University Libraries. The Libraries encourage the support of supervisors and colleagues in making research time available. The Research Leave Program is intended to aid research by IUB librarians by making research leaves available to them in suitable circumstances.
2. The Bloomington members of the Sabbatical Leave Committee serve as the IUB Research Leave and Support Grant Funds Committee. This committee reviews applications and makes recommendations to the Dean.
3. The question of coverage during the librarian's absence is handled in a way similar to the approach taken for sabbaticals — i.e., it is the supervisor's responsibility to make arrangements. The supervisor's signature on the Application for Research Leave attests that such arrangements have been made.
4. A research leave may be from two weeks to two months in length.
 - A. Non-tenured librarians in a tenure-track position are eligible for up to five months of research leave in the period between appointment and application for tenure.
 - B. Tenured librarians are eligible for up to seven months of research leaves, in addition to a sabbatical leave, within each seven-year period.
5. The Application for Research Leave is submitted to the librarian's supervisor, who signs (to denote approval of the proposal and the provision of adequate coverage) and forwards it to the appropriate administrator. The administrator prepares a recommendation and signs the form before forwarding the application to the Libraries Human Resources Officer, who distributes it to the Research Leave and Support Grant Funds Committee. The Committee makes its recommendation to the Ruth Lilly University Dean of University Libraries.
6. There are no deadlines for applications for research leaves. Nevertheless, it is strongly recommended that an application be submitted at least six weeks in advance of the proposed beginning date for the research leave, or in any case as far in advance as possible, to give time for the application to be processed and evaluated by all concerned.

7. The following information is used to evaluate the proposed research projects:
 - a. Statement of objectives and general description of project.
 - b. Method and plan of work.
 - c. Significance of the project to the library profession or the specific field in which it is undertaken.
 - d. Applicant's vita.
 - e. Preliminary work completed and evidence that the project can be completed within the requested time.
 - f. Plan for communicating results of the research to a local, regional, or national audience.
 - g. Dates of requested leave.
 - h. Reports from previous research leaves.
8. Upon completion of the research leave, the librarian must provide a brief report describing the progress of his/her research to the Chair of the Research Leave and Support Grant Funds Committee. The Committee chair shall forward copies of the report to the librarian's supervisor and the Libraries Human Resources Officer and shall also submit information from the reports for publication in *IUL News*.

Home > Department > Library Human Resources > Staff Manual: Staff Development

Staff Manual: Staff Development

Revised 12/05.

Policy

The Library Staff Development Program provides staff members with support for acquiring the knowledge and skills necessary to perform effectively in current and future assignments in the Library.

Staff development includes three components:

Orientation

New employees are introduced to the unit and Library organization and working environment, and to the University.

Training

Employees are familiarized with knowledge and skills necessary to perform specific responsibilities effectively.

Development

Employees are introduced to broad concepts and general background and techniques necessary to assume new and higher level responsibilities and to respond positively to change.

Activities in the Program are both formal and informal. Typical activities include orientation sessions, training workshops presented in the Library, programs offered by the University Human Resources Development Office (HRD) or Information Technology Central Services (ITCS), and course-work supported through the Tuition Refund Program (see above).

Supervisors are responsible for developing training plans that provide structure and direction to their job-training activities. Samples of training plans from the University Library and from other libraries are available for supervisors in Library Human Resources. Copies of training plans should be distributed to the trainee as well as to others involved in the training program.

The Library Staff Development Program offers helpful and timely workshops in the Library. These workshops are conducted by Library staff members, HRD personnel, or other qualified persons and are announced in flyers and in the Newsletter. Persons interested in attending workshops offered in the Library should consult with their supervisors and register with Library Human Resources.

When a staff member requests support to participate in any staff development activity, the employee and the supervisor review information about the activity, and discuss what the person hopes to achieve by participating. This discussion provides an opportunity for the staff member and supervisor to determine the relevance of a particular activity, and after participating, its effectiveness.

Process

Activities Held In The Library

Employee

- Discusses the activity with the supervisor and identifies specific results desired from participation. (For example, in attending a workshop on writing effective instructions, a staff member may wish to develop skills in organizing and writing directions clearly.)

Supervisor

- Approves request (or explains denial).

Employee

- Registers for approved activity through Library Human Resources.

Note: An employee must notify Library Human Resources as soon as possible if he/she cannot attend an activity for which they are registered.

Activities Held Outside The Library (HRD & ITCS)

Employee

- Discusses the activity with the supervisor and identifies specific results desired from participation.

Supervisor

- Approves request (or explains denial).

Employee

- Completes the Request for Funding of Staff Development Activities Form and submits it to the supervisor.

Supervisor

- Completes the supervisor's section of the form and forwards the document to the Staff Development Officer for funding approval.

Note: The supervisor and/or attendee should not register themselves.

Staff Development Officer

- Reviews the request, considering the quality of the activity based on previous participants' evaluations, the cost of the activity, and the frequency of the activity's (or similar activity's) availability.
- Approves request (or denies request, so notifying the supervisor).

Staff Development Office

- Notifies staff member of approval and completes necessary registration paperwork.

Employee

- Attends activity.
- Submits a written evaluation of the activity to the Staff Development Office, 413 Hatcher North, within two weeks.

All Other Staff Development Activities

Employee

- Fill out Travel Request Form appropriately and obtain required signatures.

Tue, 12/02/2008 - 09:16 | Ken Varnum

Access this page at: <http://www.lib.umich.edu/node/15355>

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Professional Development Leave
September 1991
University Libraries

Professional Development Leave is made available for */_all library staff members_/* who desire to enhance their professional status through scholarly pursuits, either by publication or through participation at professional meetings and conferences. Although it is anticipated that staff members will also use their personal time for preparation, pressures of time and the scope of individual projects will often require the use of library work hours.

Professional Development Leave is defined as time required to complete work on one or more of the following:

1. A formal book-paper-article, chapter in a book--to be submitted for publication.
2. A formal presentation at a library related state, regional, or national conference.
3. Preparations involved with a committee assignment at a library related state, regional, or national conference.

For each staff member, a maximum of 10 days (80 hours) is made available each fiscal year. The time may be taken in blocks of not less than 2 hours and must be pre-arranged with the staff member's immediate supervisor and Department Chair, and be approved by the Associate Dean for Administration.

The granting of Professional Development Leave assumes a responsibility on the part of the staff member for the completion of the particular project. Evidence of completion must be submitted to the Associate Dean for Administration by an agreed upon date. Failure to provide such evidence will influence the granting of any future requests for Professional Development Leave from that staff member.

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<mailto:webinput@unlnotes.unl.edu>

Time Grant Program

Program for staff for release time to work on scholarly, writing or research activities

Time Grant Program

Supports research, writing and scholarly activities for libraries staff

Introduction

The University of Washington Libraries recognizes the value of research, writing and scholarly activities as of great benefit to the Libraries and to staff member development. In order to encourage and support such activity the Libraries offers a Time Grant Program to librarians, professional and classified staff members.

Time Grant Program Guidelines

Definition. A time grant is time during which a staff member or group of staff members is released from normal work duties and compensated at the regular rate of pay in order to pursue a goal of writing, research or other scholarly activity. Activities should be of benefit to the Libraries and result in a product, such as an article, bibliography, presentation or the like. If two or more staff members are working on a joint project, they may apply for time grants as a group. The time grant program is administered by the Libraries Staff Development and Training Coordinator.

Eligibility. Time grants are available to any staff member who has been employed at the University of Washington Libraries for a period of one year. Part time permanent employees are eligible for time grants. Temporary staff are not eligible.

Duration. Staff members may apply for time grants of various duration depending upon the individual activity. The total number of hours for a time grant will not exceed 240 hours. Applicants may apply for amounts and configuration of time that suit the scholarly activity and are in keeping with the needs of the work unit. For example, after consultation with a supervisor, one staff member might apply for a one week grant while another might apply for 8 hours each week for ten weeks. Time grants do not have to fall within one quarter, but may bridge more than one quarter.

Limitations. Time grants are not available to pursue a degree.

Use of Libraries facilities and resources. During the time grant, the staff member may use Libraries facilities, supplies, equipment, and services on a reasonable and occasional basis. The Libraries relies on the common sense and good judgment of the individual staff member to keep usage reasonable. Facilities, supplies, equipment and services that can be used judiciously include:

- Photocopying
- Postage and mailing
- Faxing documents
- Long distance telephone calls
- Use of workstation computer/printer
- Paper
- General office supplies

- Other resources as appropriate

Application procedures. A staff member may apply for a time grant at any time through the supervisory line to the appropriate Assistant or Associate Dean who will review the request and forward a recommendation to the Dean of University Libraries. An Assistant or Associate Dean who would like a time grant shall apply to the Dean of University Libraries. A copy of an approved time grant application will be sent to the Libraries Staff Development and Training Coordinator. Once an application for a time grant has been submitted, it must go through the entire process. A negative decision at any stage prior to review by the Dean does not stop the request from proceeding to the next stage.

There is no formal application form. A staff member(s) should negotiate the time grant with the immediate supervisor(s) and prepare a **brief** written request that includes:

- Staff name(s), job title(s), unit(s)
- Amount and configuration of time grant with beginning and ending dates
- Description of writing, research or scholarly activity
- Benefit(s) of the project to the Libraries and to the individual's development
- Expectations for use of Libraries facilities and resources
- Anticipated travel time, if any (Travel funding policies and procedures are available on the Libraries staff web.)

If two or more staff members want to apply as a group, each person must negotiate with their immediate supervisor. The group may submit one application signed by all supervisors or each group member may submit an individual application.

Supervisors should take into consideration the effect of the time grant on the work of the unit. It is the supervisor's responsibility to ascertain what activities or tasks might be curtailed or reassigned and to make arrangements for such. Supervisors may request, through the supervisory line, resources and/or funding to continue appropriate levels of operations for the duration of the time grant.

Report of time grant. The staff member(s) must prepare a brief written report of the results of the activity within a month of the end of the time grant. Included with the report should be a copy of the resulting product, such as an article, bibliography, presentation or the like. The report should be submitted to the immediate supervisor, the appropriate Assistant or Associate Dean and the Libraries Staff Development and Training Coordinator. A copy of the report will be linked from the Time Grant page on the Libraries Staffweb.

Additional Leave Programs

Librarians. Professional leave with salary may be granted to librarians with permanent or continuing status for up to one year during a seven year period. The leave may be taken all at once or at different times within the seven year time period. A librarian granted professional leave must agree, in writing, to return to the University of Washington Libraries for a period of one year after the leave. (Librarian Personnel Code, Guidelines for Professional Leave).

Professional staff. Professional leave with pay is available to professional staff who have been at the University of Washington for at least 6 years. Leave is available to acquire knowledge and/or experience which will enhance contributions to the University. Professional Staff leaves are not available for the purpose of working towards a degree. Leaves provide salary support from full salary for three months to two-thirds salary for leaves exceeding six months. The program is administered by the University of Washington Office of Human Resources. More information is available in the Professional Staff Program document on the UW Human Resources web site.

Education/Tuition/Training Policies

Scholarship Program

From AldenStaff

Contents

- 1 Statement of Purpose:
 - 1.1 Definitions
- 2 Overview
- 3 Procedure
 - 3.1 MLIS scholarship
 - 3.2 Ohio University course scholarship

Statement of Purpose:

The Libraries' has instituted a Scholarship Program, to assist Ohio University Libraries' staff members pursuing Master's degrees in Library and/or Information Science; or classes at Ohio University that are related to one's assignment. Support provided by this scholarship does not commit the Libraries beyond the scope of the scholarship program: to provide educational support to the Libraries' employees.

Definitions

- Qualified Staff: Any employee of the Ohio University Libraries (Athens Campus) employed at least ½ time, and who (if a classified employee) has completed the initial probationary period.
- Related courses: Courses taken at Ohio University which are a requirement of the employee's position, or which serve to maintain and/or improve the skills required to perform job assignments.

Overview

- The Libraries provide financial assistance to qualified staff who are pursuing a Master's Degrees in Library and/or Information Science; as well as assistance with General Fees for related courses taken at Ohio University.
- Position responsibilities take precedence over coursework; class schedules shall be approved by the department head and time spent in class may be required to be made up. With supervisor approval, an employee may take only one course per quarter/semester during regular work hours. (See Ohio University Policy 40.015 (<http://www.ohio.edu/policy/40-015.html>))
- A Scholarship Committee will be constituted to review applications and to make recommendations of financial support to the Dean of Libraries. The Committee will be chaired by the HR Librarian, and will include the Budget Unit Manager, a representative from Library Council, and other members as appointed by the Dean.
- Successful completion of courses is required for continued participation in the scholarship program.

Procedure

- Individuals wishing to participate in the scholarship program are to submit an application for support prior to the start of the academic quarter or semester. Awarding of financial support is granted on a course-by-course basis, not for entire degree programs.

Applications will be accepted throughout the year, as the applicants receive the supporting documentation from their schools. Applicants are encouraged to apply as soon as the information becomes available to facilitate review by the Scholarship committee.

Submit Application materials to D. Daniels, co-chair of Scholarship Comm.

Ohio University / Hocking College

1. OU Educational Benefits Request form (Excel)
(http://www.ohio.edu/hr/forms/upload/Ed_Ben_Employee.xls)
2. OU Educational Benefits Request form (PDF)
(http://www.ohio.edu/hr/forms/upload/Ed_Ben_Employee.pdf)
*with supervisor signature.

Library Scholarship

1. Scholarship Application form (Excel)
2. Narrative statement explaining reason for taking class.
3. Copy of invoice*
4. Letter of acceptance to a Library and/or Information Science Program*
(*as applicable)

- Recommendation for approval of the application is made by the Scholarship Committee. After receiving and reviewing the applications, the Committee will report in writing to the Dean the names of the eligible employees and the recommended level of financial assistance proposed for each. Final determination of support rests with the Dean.

MLIS scholarship

For those cases where financial assistance is awarded, each applicant requesting support for a Library Science program may receive a maximum of 50% of expenses, 25% at the beginning of the quarter/semester, and 25% at the successful completion of the class. The actual amounts awarded will be based on the number of approved applicants, the number of credit hours being taken by each and the financial resources available.

*Upon completion of class, forward a copy of grade report to Budget Unit Manager with request for balance of scholarship.

Ohio University course scholarship

Financial assistance for staff taking classes at Ohio University may cover up to 100% of general fees for full-time employees, or be pro-rated accordingly for qualified part-time employees, based on available resources and the degree to which the class is required.

Retrieved from "https://staff.library.ohiou.edu/wiki/index.php/Scholarship_Program"

Category: Policies

- This page was last modified 14:28, 31 December 2008.



POLICY NO: 406
EFFECTIVE DATE: 11/01/2008

TUITION ASSISTANCE FOR FACULTY AND STAFF

The University offers full-time faculty, regular full-time staff and limited service staff the opportunity to pursue knowledge and to advance their personal and professional development by providing tuition assistance for credit courses at the University of Pennsylvania.

The faculty/staff member is responsible for managing his/her tuition benefit in accordance with the policies and procedures below.

[Click here](#) to begin using the online tuition management system. With this easy-to-use online system you can apply for tuition benefits, as well as track the status and view the history of requested tuition benefits.

- [406.1 ELIGIBILITY](#)
- [406.2 HIRE/TERMINATION DATES](#)
- [406.3 JOB RESPONSIBILITY](#)
- [406.4 TUITION AMOUNT](#)
- [406.5 APPLYING FOR BENEFITS](#)
- [406.6 TAX LIABILITY](#)
- [406.7 PROGRAM PARTICIPATION](#)
- [406.8 HEALTH INSURANCE](#)

406.1 ELIGIBILITY

All full-time faculty in a benefits-eligible title, regular full-time staff and limited service staff are eligible for tuition assistance benefits in any school of the University of Pennsylvania to which they have been admitted.

All staff members affected by position discontinuation and eligible for benefits in accordance with Policy 628, who were participating in the tuition assistance for faculty and staff benefit at the time of notice of position discontinuation, will receive tuition benefits through the end of the semester in which notice of separation was given.

Retired University faculty and staff who meet University eligibility requirements and retirement criteria, as verified by a retirement specialist within the Division of Human Resources Benefits Office, are eligible for the same faculty and staff tuition benefits for which they were eligible immediately prior to retirement.

A visiting member of the instructional staff is eligible for tuition assistance only if specified in the minutes of the Provost's Staff Conference.

In the case of faculty/staff eligible for the tuition benefit, the following special situations may affect a faculty or staff member's continued eligibility:

- **Leave of Absence without Pay:** Faculty and staff on a leave of absence without pay are not eligible to receive tuition benefits during the leave.
- **Workers' Compensation:** Faculty and staff on workers' compensation will continue to be eligible for the tuition benefit for one year from the date workers' compensation began.
- **Long-Term Disability (LTD):** Faculty and staff on long-term disability are eligible to receive the tuition benefit for as long as the faculty/staff member continues to qualify for long-term disability per the University of

Pennsylvania's LTD policy.

- Faculty/staff who are active, but not being paid, may be considered ineligible.
- Family and Medical Leave (FML) or Short-Term Disability (STD): Faculty and staff on approved family medical leave or short-term disability are eligible to receive the tuition benefits they are normally eligible for as follows:
 - If a faculty/staff member is on approved family medical leave (FML) or short-term disability (STD) and the end date of his/her leave is before the eligibility cutoff date for the semester, the faculty/staff member must return to work on his/her approved FML or STD end date and work past the eligibility cut-off date for the term, or continue to be out on official FML or STD. If the faculty/staff member is put on an unpaid leave of absence after family medical leave or short-term disability has been exhausted, but before the eligibility cut-off date for the term, s/he will not be eligible for tuition benefits.
 - If a faculty/staff member is on approved family medical leave or short-term disability and the end date of his/her leave is after the eligibility cut off date for the term, the faculty/staff member is eligible for the tuition benefit.

The benefits and policies for University of Pennsylvania faculty/staff who work in locations outside of Penn's main campus may be different from the benefits and policies set forth in this policy. Faculty/staff working outside of Penn's main campus should contact their Human Resources representatives for more information.

Tuition assistance benefits are administered by the Tuition Office in the Division of Human Resources. The Tuition Office makes final administrative determinations if any questions arise concerning an individual's employment relationship with the University and eligibility for tuition assistance under the program.

406.2 HIRE/TERMINATION DATES

Eligible faculty/staff hired on or before the cut-off date of a semester may obtain tuition benefits for the semester in which they were hired. Eligible faculty/staff hired after the cut-off date of the semester cannot receive tuition benefits until the start of the following term. Faculty/staff who terminate or become otherwise ineligible on or before the cut-off date of the semester lose their benefit. Faculty/staff who terminate after the cut-off date of the semester will receive the benefit through that semester.

The cut-off dates are:

Spring semester:	March 1
Summer Session I and 12-week Summer Session:	June 1
Summer Session II:	July 15
Fall semester:	October 15

406.3 JOB RESPONSIBILITY

Faculty and staff who elect to take courses and receive tuition benefits under this program must continue to meet the full responsibilities of their University positions. Faculty/staff may attend classes during their normal working hours provided they have received prior approval from their immediate supervisor and have arranged to make up the work and any time away from regular hours of business. A supervisor may deny a faculty/staff member's request to attend classes during normal working hours if the supervisor determines the faculty/staff member's presence during those hours is essential to the job or the needs of the department.

406.4 TUITION AMOUNT

Eligible faculty and staff may receive tuition assistance for six (6) course units of the tuition, general fee and technology fee over the academic year for credit courses and Math 101. Tuition assistance will be provided for a maximum of two (2) course units along with the above fees in both the Fall and Spring semesters. Tuition assistance

along with the above fees for up to a maximum of two (2) course units will be provided during the University's two summer sessions. Course units cannot be accrued. Some courses are more than one course unit. No fees are covered other than those stated above.

The benefit will not cover financial penalties associated with dropped courses. Financial penalties incurred for courses dropped after a faculty/staff member's educational program's official "course selection" period (usually ending approximately two weeks into a semester) are not covered by the tuition benefit. Faculty/staff should take note of their program's deadline to drop a course with no financial obligation or consult with the educational program about their course selection period before enrolling in courses. Any benefit payments made for courses that are dropped will be retracted near the end of the term, leaving a balance on the student account.

If a faculty/staff member receives a refund of a full or partial tuition benefit payment, s/he must return the payment to Student Financial Services and notify the tuition benefit office immediately or else will be held liable. Under no circumstances can the Penn tuition benefit be refunded to a faculty/staff member. Failure to refund the University of Pennsylvania is in violation of the University's tuition benefit policy and will result in the University taking appropriate actions to recapture the funds.

If a faculty/staff member enrolls in an executive or full-time program that does not calculate tuition on a per-course-unit basis, the faculty/staff member will still receive the coverage as outlined above. The tuition benefit office will calculate the benefit by using the per-course-unit tuition rate from the most closely related program that calculates tuition on a per-course unit basis. The program/rate used is determined at the sole discretion of the Tuition Benefit Office.

406.5 APPLYING FOR BENEFITS

To apply for tuition benefits, use the online tuition system at www.hr.upenn.edu/tuition. You should apply as soon as you have been accepted into a school's program or as soon as you have registered for courses. Application for benefits must be completed for every semester in which you wish to request the benefit.

You must use the online system to apply no later than the following dates:

Spring semester:	March 15
Summer Session I and 12-week Summer Session:	June 15
Summer Session II:	August 15
Fall semester:	November 15

Tuition benefits are contingent upon timely application using the online system. Failure to file for benefits in a timely manner may result in the application of late charges to the your bill, for which you are responsible. Benefits will not be approved for requests that are submitted after the deadline dates listed above for a specified term.

Faculty/staff are responsible for monitoring their student bills for balances and assume full responsibility for the entire bill until the benefit payment has been applied. Resulting balances due to fees not covered by the benefit such as late fees, program fees, lab fees or balances due to withholding are the responsibility of the faculty/staff member.

406.6 TAX LIABILITY

Faculty/staff are fully responsible for any tax liability incurred as a result of these benefits being treated as taxable income to the faculty/staff at any time. The University may report the benefit amount as income to any taxing authority and withhold taxes from such benefit amounts or from the faculty/staff member's other salary income. Under current law, graduate tuition benefits for faculty and staff are subject to federal income tax, FICA (Social Security tax), Medicare tax and city wage tax to the extent that the benefits exceed \$5,250 per calendar year. This "tax-free" exemption currently applies through calendar year 2010.

Any applicable taxes are withheld directly from the benefit and the net amount is awarded to the student as the benefit. The student will then be left with a balance on his/her student account that must be paid within the deadlines set by the University's Student Financial Services Office. The gross tuition amount subject to taxes and the taxes withheld are

reported to the IRS as a part of the faculty or staff member's earnings. The taxpayer is responsible for making appropriate W-4 adjustments, if desired. The taxpayer is also responsible for settling his/her tax liability on year-end tax filing.

406.7 PROGRAM PARTICIPATION

In order to take courses at the University of Pennsylvania, faculty/staff must apply, as would any outside candidate, and be accepted into the Penn program of interest. Eligibility for the tuition benefit does not confer acceptance into a Penn program.

Faculty/staff accepted into a program at Penn are considered students of Penn and are thus bound by all program and University rules and regulations. Faculty/staff may be limited in their access to certain programs by educational program regulations such as those requiring full-time status or program/course pre-requisites or restrictions. Educational program regulations are outside the scope or management of the Tuition Benefit Office and should be thoroughly researched by the faculty/staff member before embarking on any course of study.

406.8 HEALTH INSURANCE

The University requires full-time students to maintain medical insurance with coverage for inpatient care and catastrophic illness and injury. Student Health Services will automatically enroll and bill full-time students for the Penn Student Insurance Plan if they do not submit a waiver each school year showing that they have other health insurance. This includes faculty and staff members working at Penn. If you have health coverage through Penn's benefits program or through another source (e.g., spouse's benefits program), you must submit a waiver to Student Health Services each school year. Please refer to the Student Health Services website for more information (www.vpul.upenn.edu/shs/).

Applicability: Full-time Faculty, Regular Full-time and Limited Service Staff

Cross-reference: [Policy 407](#), [Policy 408](#), [Policy 409](#), [Policy 628](#)

Supersedes Policy Number(s): 406 (08/15/95, 07/01/97, 07/01/2004, 05/26/2005, 11/02/2005, 04/09/2007)

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Policy HR36 EDUCATIONAL PRIVILEGES FOR FACULTY, STAFF, AND RETIREES

POLICY'S INITIAL DATE: August 1, 1955

THIS VERSION EFFECTIVE: July 17, 2008

Contents:

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- [Employee Eligibility](#)
- [Service Requirement](#)
- [Where Courses are Offered](#)
- [Limitations](#)
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- [Credit Limits - 12-Month Employees](#)
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- [Graduate Degree Limitation](#)
- [County Agents, Home Economics Extension Personnel, Certain Continuing Education Personnel](#)
- [Amount of Fee Reduction](#)
- [Other Limitations](#)
- [Cross References](#)

PURPOSE:

To provide faculty, staff, and retirees the opportunity to advance their education by taking University courses at reduced fees.

EMPLOYEE ELIGIBILITY:

The following categories are eligible for educational privileges:

- a. A regular employee during active periods of employment and certain inactive periods of employment. See [HR16](#), [HR19](#), [HR34](#), [HR88](#), and [HRG11](#) for eligibility of regular employees during inactive periods of employment.
- b. A faculty or exempt staff member appointed on a full-time Fixed-Term II, or full-time, faculty Visiting Appointment for at least one semester or summer session, during any time covered by that appointment which encompasses both the beginning and end of a semester or summer session.
- c. A member of the armed services who is on the staff of the Department of
 1. Military Science

2. Air Force Aerospace Studies

3. Naval Science

d. A retired employee, provided the retiree meets the requirements for the continuation of benefits after retirement.

SERVICE REQUIREMENT:

Educational privileges are available for any semester or summer session in which classes begin on or after the faculty or staff member's date of full-time, regular employment.

Employees are not eligible for educational privileges for any semester or summer session in which classes begin after the employee's final day of fulltime, regular employment status. Also, the faculty or staff member must remain in regular employment status for at least one-half of the semester or summer session in order to maintain eligibility for the educational privileges. These limits do not apply to an eligible retiree as indicated in "d" in the section above.

WHERE COURSES ARE OFFERED:

Eligibility for University educational privileges for an employee applies at all University locations.

LIMITATIONS:

The educational privileges apply to all resident instruction and continuing education credit courses except the professional curriculum such as those offered at the College of Medicine at The Milton S. Hershey Medical Center, the Smeal College of Business Administration Executive MBA Program, and the Dickinson School of Law. Educational privileges do not apply at summer camps or workshops operated by the University unless University credit is given and regular tuition is charged.

REQUIRED APPROVAL:

Permission for a regular employee to schedule courses is a special arrangement and privilege, and should not be considered as a right. It is granted only when the supervisor believes that the scheduling of courses will not interfere with the efficient operation of the employee's regular University duties.

CREDIT LIMITS - 12 - MONTH EMPLOYEES:

Scheduling of classes by a regular employee on a twelve-month-service basis (including an academic employee), either for credit or to audit, is limited to sixteen (16) credits per academic year beginning with the summer session.

An employee (other than academic) can schedule up to a full schedule of credits during a semester or summer session that the employee is not working, provided that he or she is on vacation or layoff during the entire period of that academic session.

CREDIT LIMITS - TWO-SEMESTER EMPLOYEE

Scheduling of classes by a regular employee on a two-semester-service basis (including an academic employee), either for credit or to audit, is limited to twelve (12) credits during the two semesters in which the employee has worked within the academic year.

A two-semester-service basis employee can schedule up to a full schedule of credits during the summer session the employee is not working, provided he or she continues to receive payments on the salary payroll.

GRADUATE DEGREE LIMITATION:

No academic employee above the rank of Instructor, Research Assistant, or equivalent may receive from the University the Master's Degree or the Doctor's Degree in any graduate program where the faculty member has membership, teaches courses, serves on Master's or Doctoral Committees, or has other supervisory responsibilities which might give rise to conflicts of interest. The faculty member should inform his/her department head of his/her intention to pursue an advanced degree.

**COUNTY AGENTS, HOME ECONOMICS EXTENSION PERSONNEL,
CERTAIN CONTINUING EDUCATION PERSONNEL:**

A County Agricultural Agent or Home Economics Extension Representative (including those at the Assistant and Associate ranks), and certain Continuing Education personnel with the job titles of Assistant Director for Continuing Education, Area Director, or Area Representative, including Coordinators and Specialists in various subject matters or program areas, can schedule up to a full schedule of credits during a semester or summer session that the employee is not working, provided that he or she is on vacation, layoff, or leave of absence during the entire period of that academic session.

AMOUNT OF FEE REDUCTION:

The educational privileges include a reduction of 75% of the tuition payable per credit.

OTHER LIMITATIONS:

The educational privilege is a generous benefit provided to employees and additional Penn State funds should not be used to supplement the educational privilege benefit. Therefore, those receiving educational privileges are not eligible for University scholarships and also may not receive funding from other University sources (general, restricted or unrestricted miscellaneous funds), with the exception of endowed funds specifically established for the benefit of employees.

Note that [HR38 - University Courses for Training Faculty and Staff](#) covers situations where the department wants an employee to take a course as professional development. General funds may be used in these situations, but the department must pay 100% of the cost and the educational privilege (employee grant-in-aid) does not apply. Departments are not permitted to ask employees to enroll using the educational privilege, and then to reimburse the employee for the 25% of tuition not covered.

If additional support is provided through an endowed fund specifically established for the benefit of employees, the award to the employee must be posted in the ISIS system for all credit courses - no direct reimbursement to the employee is permitted. In addition, the application of these funds may only be used to cover remaining tuition - no refunds to employees may result from the application of these funds. All awards to employees must meet the eligibility requirement of the endowment and those

receiving the funding must be approved by the budget executive for the unit as well as for the budget executive for the employee's home budget, if not the same as the budget executive for the endowment.

CROSS REFERENCES:

[HR16](#) - Leave of Absence without Salary (Other than for Extended Active Military Service)

[HR18](#) - Graduate Study Leave of Absence

[HR19](#) - Leave of Absence for Active Military Service or Training

[HR34](#) - Employment Conditions for Staff Employees

[HR37](#) - Grant-in-Aid for Dependents of Faculty, Staff and Retires

[HR54](#) - Continuation of Group Insurance After Age 60, Age 65, and After Retirement or Death

[HR88](#) - Alternatives to Regular Twelve Month Staff Employment

[HRG11](#) - Family and Medical Leave

[HRG13](#) - Definition of Formal Study as Outlined in HR16

REVISIONS:

July 17, 2008

OTHER LIMITATIONS section added.

August 1, 2007

Clarification added to Limitations paragraph.

July 1, 2002

Limitations section - revised to include the Smeal College of Business Administration Executive MBA Program

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Policy UL-HR04 Release Time to Attend Academic Courses

HUMAN RESOURCES

Policy UL-HR04 RELEASE TIME TO ATTEND ACADEMIC COURSES

Contents:

- Purpose
- General Statement
- Course Eligibility
- Employee Eligibility
- Guideline
- Types of Work Schedule Accommodations
- Handling Time Spent Attending Course-Related Activities
- Approval Procedure
- Revocation of Release Time Privileges
- Cross References

PURPOSE:

These guidelines provide a framework for employees and supervisors to use in making consistent and equitable decisions regarding release time to attend a Penn State academic course.

GENERAL STATEMENT:

The University Libraries recognizes the importance of its employees and their contributions to the accomplishment of its mission. The Libraries' administration supports and encourages the continuing education of all its employees. It is understood that is not always possible for employees to select a course that is scheduled outside of their normal working hours. Therefore, supervisors are encouraged to grant release time or make work schedule accommodations, as work needs allow. The granting of release time or any other work schedule accommodation for an employee to attend a Penn State academic course is a special arrangement and privilege, and should not be considered as a right.

COURSE ELIGIBILITY:

Employees may request release time to attend any Penn State academic course.

Employees may also request release time to attend a graduate study course at another institution if that course meets one of the criteria listed below:

1. For employees at University Park and locations away from University Park:
 - a. The graduate study course is not offered by Penn State either traditionally or online and the other institution is located within a reasonable commuting distance of the work location.
2. For employees at locations away from University Park only:
 - a. The graduate study course is offered at Penn State, but is not offered at the employee's work location, any other Penn State campus within a reasonable commuting distance, and/or online.

Employees may not request release time to attend an undergraduate course at another institution.

EMPLOYEE ELIGIBILITY:

An employee must meet one of the categories below and have completed at least six months of employment in the University Libraries.

1. A regular, full-time faculty or staff member appointed on a standing or fixed-term I appointment.
2. A faculty member appointed on a full-time fixed-term II appointment.

GUIDELINE:

Libraries' employees may be granted paid release time to attend a Penn State academic course which is scheduled to meet during their normal working hours. Release time includes travel and class time and will not exceed a maximum of three and one-half hours per week for full-time staff; for staff on less than 100% full-time equivalency (FTE)

appointments, release time will be calculated on a pro-rated basis, based on their % FTE during the semester they are requesting to attend the course. Release time is not considered "time worked" in the computation of overtime.

Service needs of the department must take first priority. The immediate supervisor is responsible for ensuring that granting of an employee's request will not interfere with the service needs of the department nor the employee's job requirements. (See [Guidelines for Approving Work Schedule Accommodation Requests](#))

Employees who have received supervisory approval to either take more than one class or one that exceeds three hours per week, in any one semester, during normal working hours must either make-up the time missed, use vacation, or take a personal leave of absence without pay.

In cases where the granting of release time is not feasible due to service needs of the department, employees may request and supervisors may approve a work schedule accommodation.

TYPES OF WORK SCHEDULE ACCOMMODATIONS:

The following accommodations are possible and are at the discretion of the immediate supervisor:

Flexible Work Schedule:

There are two options that apply:

1. An employee may request to temporarily change their scheduled work hours during the semester in which they are attending a course, keeping in mind that they must still work the required number of work hours each work week (typically 40 hours for 100% FTE). (See also, Guideline HRG02, Alternate Work Arrangements)
2. A supervisor may grant release time during normal working hours but require the employee to make up the hours missed on an hour-for-hour basis within the same workweek, as scheduled by the supervisor. For nonexempt employees, hours made up in addition to a 40-hour workweek are subject to overtime compensation.

Personal Leave of Absence without Pay or Use of Vacation Time:

In some cases the needs of the department and/or employee are better served by allowing the employee to take a personal leave of absence without pay (see [Policy HR16, Leave of Absence without Salary](#)) or to use vacation time to cover their absences.

HANDLING TIME SPENT ATTENDING COURSE-RELATED ACTIVITIES:

Employees are not permitted to perform or attend course-related activities during normal working hours. Examples of course-related activities include studying, homework, research, field trips, group project meetings, study sessions, etc. Time spent performing or attending course-related activities outside of the weekly scheduled class meeting time should be done on the employee's personal time and may be charged to vacation, personal holiday, or compensatory time or made up at the discretion of the immediate supervisor.

APPROVAL PROCEDURE:

Employees requesting a work schedule accommodation to attend a Penn State academic course must submit their request, by completing the [Request for Release Time to Attend an Academic Course Form](#), prior to registering for the course. Approval must be granted by the employee's immediate supervisor with concurrence from the unit/subject head and department head.

Supervisors may request to see proof of enrollment and completion of courses.

REVOCATION OF RELEASE TIME PRIVILEGES:

Release time privileges may be revoked if the time away from work negatively affects operations in the unit or the employee's performance of their regular duties and responsibilities.

CROSS REFERENCES:

Other Policies in this manual should also be referenced, especially the following:

Guideline [UL-HRG15](#) Approval of Work Schedule Accommodation Requests

Form: [Request for Release Time to Attend an Academic Course](#)

Policy [HR18](#) – Graduate Study Leave of Absence

Policy [HR36](#) – Educational Privileges for Faculty, Staff, and Retirees

Policy HR65 – Graduate Study Grants for Exempt Staff Personnel who are Permanently Away From University Park to Support Study at Other Institutions of Higher Learning

Effective Date: September 19, 2005

Date Approved: September 19, 2005 (Dean's Library Council)

Revision History (and effective dates):

- December 2008 – Revised to include course eligibility requirements.
- September 19, 2005 – New policy (Formal)
- September 2002 – New policy (Interim)

Last Review Date: December 2008

University of Virginia Library *Professional Development Funding Policy*

In order to meet the challenges of today's academic research library environment and to better support the mission and goals of the Library, the University of Virginia Library encourages all employees to participate in professional development/education activities. Through its program of professional development/education, employees are equipped with the skills necessary to keep pace with changing user needs, master new technologies, and adapt to a workplace characterized by innovation and change. Professional development also provides networking opportunities for staff to contribute knowledge to the profession and keep abreast of developments in library or related fields.

General Policy

Based on the availability of funds, each employee has available a standard allocation per fiscal year for professional development/education activities. No formal written request is required to receive this standard allocation; however, all professional development/learning plans should be discussed with the employee's immediate supervisor and outlined in either the employee work profile or in the professional goals for the current year.

- ◆ Currently the standard allocation per Fiscal Year will be **\$800** for each faculty member and **\$500** for each non-faculty (classified & university staff) members, to be used to support professional development activities. Activities can include fees/ tuition/ travel expenses (**please note that there is a new \$2000 UVA funded Education Benefit for tuition and some non-credit courses/workshops/seminars – please check section outlined later in this document**). *An additional stipend of up to \$200.00 is available to support significant involvement, such as chairing a committee for a national organization or presenting a paper at a conference outside the University of Virginia. The maximum allocation under this policy will be \$1,000.00 for faculty and \$700.00 for non-faculty staff per fiscal year. These professional development activities should be documented in the reimbursement packet (credit card bills, invoices, and receipts, etc.) submitted to Financial Services.*
- ◆ Requests for funds *above the standard allocation* may be made at any time throughout the fiscal year. Employees should submit a statement to their supervisors that includes the following information: name, number of years worked at the Library, name of the development activity, conference, etc. and a brief statement as to how attendance will enhance individual development and/or contribute to departmental goals and objectives and/or contribute to the Library's mission, goals and objectives. Department heads have the discretion to fund the request with departmental funds or may seek additional funding to support the request from their AUL. Special consideration will be provided to newly hired library employees for whom additional funding will enable first-time involvement in professional development activities and for others with professional development goals that align closely with personal, departmental, or library goals and objectives. Approvals to receive additional funding for professional development above the standard allocation must be in writing. If travel is *involved, funding above the standard* allocation should be requested from your supervisor in advance. Additional approval of costs is based on the availability of funds.
- ◆ The *Pre-approval of Proposed Trip Estimate* form ("estimated expenditures") should be used to request the additional travel funding. If the total costs are within the standard allocation, pre-approval is not needed. For reimbursement after the trip, the *signed Pre-approval of Proposed Trip Estimate* form must be submitted to Financial Services with the Travel Reimbursement Request. Only preapproved costs above the allocation can be reimbursed.
- ◆ All newly hired library faculty members will be awarded double (\$1600) the standard allocation for their first two years of employment to support their involvement in professional development activities as new members of the UVA Library community

UVA Education Benefits (\$2000)

A full explanation of these benefits and how to enroll can be found at: <http://www.hrs.virginia.edu/benefits/educhen/edbenefitsprogram>. Further guidance can be provided by the Library Training Manager or by contacting UHR. The following is an overview from the UHR site:

Revised 11-12-08

“Tuition Benefits Program Overview A core component of the Education Benefits Program is tuition benefits, designed to provide Employees and their Schools and Departments with centrally-provided financial support for employee education, vocational and professional development opportunities, in accordance with State policy. Education Benefits may be used for academic degrees or courses at UVA and other accredited institutions, and non-credit courses, certificates and licenses at UVA and other education providers.

Schools and Departments may provide additional, departmentally-funded financial support for employee education, vocational and professional development, in accordance with State policy, by providing a PTAO that will be charged for the amount approved by the department.

While the Education Benefits program does provide funding for part-time employees the primary purpose of the program is to support full-time employees who are part-time students. The program is not intended to support the coursework of full-time students.”

If you have any questions about this policy contact UHR Benefits at 924-6954.

Library Tuition Benefits

**(This section is still under review in light of the University \$2000 Education Benefit):*

The Library will fund tuition reimbursements for a maximum of three classes per employee per year, or a maximum of \$3,000.00 per year per Library employee enrolled in a degree program depending on availability of funds. This is funding above the \$2000 Education Benefit provided by UHR. Employees should discuss enrollment in a degree program with their supervisors and need to request approval for the additional funding from their supervisor in order to ensure reimbursement. Once approved, the enrollment form for the UVA Education Benefit must be completed.

Revised 11-12-08

Funding/Release Time Policies and Procedures, Organization Development and Training

Policies and procedures for funding and release time for staff development activities.

University of Washington Libraries

Libraries Organization Development and Training

POLICIES AND PROCEDURES FOR FUNDING/RELEASE TIME

Funding and release time is available to the staff of the University of Washington Libraries through the Libraries Organization Development and Training (ODT) office. The funding is meant to encourage staff to develop their skills and capabilities and to help to create an environment in the Libraries where staff can thrive.

What types of training and development are covered by Organization Development and Training?

The following types of training and development are covered by ODT and release time and/or funding is generally available:

1. Libraries-sponsored training and development programs
2. University-sponsored staff training and development programs (non-credit) as offered by Professional and Organizational Development (POD); UW Technologies; Environmental Health and Safety; Police Crime Prevention Unit; and other such units.
3. E-Learning at a workstation and/or programs delivered through teleconferences, webcasts, or other electronic methods at a central location
4. Continuing education offered in the region by training and development companies, professional associations and other off-campus agencies.
5. Programs delivered through teleconferences, webcasts, podcasts or other electronic delivery

What is the difference between staff travel money and staff development funding?

Staff travel provides funds for librarians and professional staff to travel (transportation, food, lodging, registration fees) to professional and scholarly meetings and conferences. Staff travel will also support travel by classified staff members when travel is related to their position responsibilities in the Libraries.

ODT funding does not include travel (that is, transportation, food, and lodging). In some cases, a professional association will hold professional or scholarly meetings and conferences in the region and a number of staff would like to attend. In these cases, ODT funding may be used to cover registration costs only. Whatever the circumstances, the Dean of University Libraries, in consultation with the ODT, will strive to use various funding resources to best advantage.

Questions about whether to request travel money or Organization Development and Training funds should be directed to the Libraries Staff Development and Training Coordinator or the Director of Organization Development and Training.

Is there a funding limit for staff development funding?

Each request for funding is considered on a case-by-case basis with available funds kept in mind. The philosophy is to fund as many requests as possible within budget limits.

Who is eligible for funding and/or release time?

All fulltime, part-time and temporary employees of the Libraries are eligible for funding and/or release time.

Student hourly employees are not eligible for funding for University-sponsored or off-campus training. They will be paid at their regular hourly rate when attending Libraries-sponsored training.

There are three levels of requests:

Level 1: Release time only; not directly related to assigned responsibilities; or, long-range development and personal growth, or training is free.

Level 2: Release time and 50% funding; important to the performance of, or improvement of performance of assigned responsibilities; or, personal growth broadly related to responsibilities or career advancement.

Level 3: Release time and 100% funding; necessary for the performance of or enhancement of assigned responsibilities.

Where do I find the application for funding and release time for development?

Libraries Application for Funding can be found on the Organization Development and Training webpage at:

<http://staffweb.lib.washington.edu/staffdev/>. Questions should be directed to the Libraries Staff Development and Training Coordinator or the Director of ODT at staffdev@lib.washington.edu.

Where do I find the procedures, policies and application for travel funding?

The Libraries Travel Application and other materials can be found at:

<http://staffweb.lib.washington.edu/SWindexes/PolProc/LibTravel.html>.

How much release time can a staff member have to attend training events?

For University-sponsored training and development, the University Release Time Policy applies. Employees will be provided release time to participate in training or development up to a maximum of 24 hours per quarter plus travel to and from class. Part-time employees will have release time prorated (e.g., an employee working a 50% schedule, is eligible for 12 hours of release time per quarter).

Management directed (for example, required training) training is not included in this limitation on release time. For example, the UW Strategic Leadership Program or a computer course from UW Technologies that is required by the UW or the supervisor does not count in the 24 hours per quarter.

Release time for Libraries-sponsored programs does not count in the 24 hours per quarter.

If a staff member attends a training off-campus, it does not count in the quarterly allotment.

Employees should be granted release time whenever possible. It is the supervisor's responsibility to assure that the absence will not create an adverse impact on the operations of the unit.

What if a staff member needs only release time?

An employee wishing to attend a Libraries-sponsored or a free University-sponsored activity need only secure the supervisor's **verbal** approval for release time. Written release time approval is needed (for institutional liability purposes) for any off-campus activity even when the activity is at no cost or the employee is paying.

How does a staff member know when staff development funding has been approved?

Staff members should fill out the Organization Development and Training Application for Funding and give it to their supervisor. The supervisor will sign it and forward it to the next appropriate supervisory level. The application is then forwarded on to the appropriate Associate/Senior Associate Dean for approval. The Dean of University Libraries must approve any single requests of \$300 or more. Administrators will forward the application to ODT. When funding is approved by ODT, the staff member will be notified.

Staff members should contact the ODT office if approval is not forthcoming within 3 or 4 days.

What if the immediate supervisor denies a request for funding and/or release time?

A staff member's immediate supervisor may not deny a request for funding or time without consulting with the next level supervisor. The decision to deny time and/or funding should be fully explained to the staff member making the request.

How does a staff member pay for training?

Staff members should **not** register for training until their application for funding is approved. There are 3 ways to pay for training. When a request for funding has been approved, Libraries Staff Development and Libraries Accounting will work with the staff member to choose the most efficient method of payment.

Payment methods include:

1. Pay with budget number. For UW events, ODT will supply a budget number when the application is approved. This enables a staff member to register online for on campus classes. It is preferable to pay with a budget number on campus - some classes cost more if paid by check or credit card.
2. Pay with check or credit card and receive reimbursement. This is often the method of payment for off campus events. Save all receipts; contact Libraries Financial Services for reimbursement procedure.
3. Pay with a purchase order (PO) number. This is sometimes a payment method for off campus events. After the funding is approved, the staff member should contact Libraries Financial Services to obtain a PO number in order to register.

WASHINGTON UNIVERSITY LIBRARIES
TUITION REIMBURSEMENT PROGRAM

The successful operation of an academic research library requires a staff that is competent in all service and support areas. The staff must have up-to-date skills and knowledge that cover a broad range of library and educational activities.

COURSES AT WASHINGTON UNIVERSITY

Washington University has greatly enhanced its tuition benefit and now provides 100% remission for Washington University undergraduate courses and 50% remission for Washington University graduate courses. These courses may be taken in either the evening or day program as long as there is **no conflict with the normal work schedule**. All full-time library staff members are eligible for this benefit. Employees should register for the courses with the appropriate department and then submit, to the Benefits Office, the tuition assistance form available on the Human Resources website.

GRADUATE COURSES IN LIBRARY SCIENCE AT OTHER UNIVERSITIES

In compliance with the tax laws, current University policy permits the Library to pay for courses only if they are job related. In keeping with this, the Library will continue to assist staff members in their pursuit of the Master's Degree in Library Science.

ELIGIBILITY and CRITERIA

All full-time library staff members who have completed their orientation period and are enrolled in a graduate program in library science are eligible to participate in the program assuming satisfactory job performance is maintained. To participate, employees should complete and submit the *Application for Course Approval/Tuition Reimbursement* form prior to registering for the course.

RESTRICTIONS

The designated amount of reimbursement will be given for only one (1) three credit hour course during a semester or summer session. Prior approval of the Unit Supervisor, Head and/or Associate Dean, and the Associate Dean for Administration is required. Courses toward the completion of a doctorate degree are ineligible under this program.

REIMBURSEMENT

For graduate courses in Library Science, the Library will reimburse up to \$400. *Please note that tuition reimbursement for all graduate courses is taxable and is included in the employee's income for federal income tax purposes, under current IRS regulations, unless the course is REQUIRED for the employee's current job or satisfies certain express employer-imposed conditions for continued employment.* Reimbursement requests will be processed only after the course has successfully been completed with a grade of C or better and verification of the grade has been submitted to the office of the Associate Dean, Administration. A copy of the paid tuition receipt must be submitted along with the grade statement.

This statement is effective immediately and supersedes all other documents on this subject.

10/25/99
Revised 6/12/02

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2006-09 Contract: Article 28

Article XXVIII Tuition Assistance Program

A. Definition

A tuition assistance program for members of the academic staff shall provide tuition vouchers for students for up to two courses or six hours whichever is greater for each of two terms each fall, winter, spring/summer year and one course or four hours whichever is greater for one term each fall, winter, spring/summer year. This program applies to tuition only; incidental fees that may be charged are borne by the Academic-Staff member. Reimbursement for graduate tuition is subject to applicable federal tax. Participation under this program must be consistent with the University graduate and undergraduate academic policies.

B. Admissions

Admission to a degree program in the University, academic advising, registration, payment of fees, etc., shall be administered by the schools/colleges and service offices responsible for these functions.

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C. Enrollment

Academic-Staff members may enroll for credit courses in any school or college at Wayne State University for which they are eligible.

Article 2:

Article 2:
Article 2:
Article 2:
Article 3:

D. Eligibility

To be eligible for tuition assistance:

1. The Academic-Staff member must have been appointed prior to the last day of final registration for the term for which s/he plans to register.
2. College admission requirements must be met.
3. Total credit hours taken in a given term shall not exceed eight hours. Exceptions to this regulation shall be made only upon prior written approval of the chair and dean/vice-president of the unit where the Academic-Staff member is employed.
4. Academic-Staff members shall submit to Benefits Administration a signed Tuition Assistance Application (Form IO-780) at least five working days prior to registering. Failure to submit an application before the end of the term will forfeit eligibility under the program for that term.

Article 3:
Article 3:
Article 3:
Article 3:

Article 3:
Article 3:

E. Forfeit of Benefit

The Academic-Staff member will forfeit the tuition assistance benefit and must make prompt reimbursement of the full amount of tuition assistance to the University if:

1. A passing grade or mark is not achieved.
 - a. For the purpose of establishing eligibility for this program undergraduate grades of A, B, C, D and graduate grades of A, B, C shall be considered passing grades. Marks of P or S shall be considered passing.
 - b. Marks of "Deferred" (Y) must be resolved into passing grades within twelve

months following termination of the term in which the course was elected. An extension for an additional twelve months may be granted upon the written approval of the President or his/her designee. One-year extensions for the completion of "Deferral" (Y) marks for thesis or dissertation credit shall be granted by the President or his/her designee upon receipt of a written request from the Academic-Staff member countersigned by the appropriate graduate officer to verify continuance in an academic program.

- c. Marks of "Incomplete" (I) must be resolved into passing grades within twelve months following termination of the term in which the course was elected.
 - d. Marks of I or Y must be resolved into passing grades or marks prior to employment termination date.
 - e. Marks of I or Y must be resolved into passing grades or marks prior to certification of degree.
2. The Academic-Staff member does not remain on the active payroll for the entire term in which s/he makes application for the tuition assistance.

F. Course Work in Relation to Academic-Staff Working Hours

1. One course per semester may be taken during the Academic-Staff member's normal working hours, provided his/her chair/dean/vice-president is able to arrange adequate coverage of the position.
2. Time taken off is charged to vacation or additional hours are worked to make up the time taken off.
3. Prior written approval is sent by the dean/vice-president to the President or his/her designee with a statement of how the time is to be made up and is approved by the President or his/her designee.

G. Collection of Forfeited Tuition Assistance Amounts

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If an Academic-Staff member forfeits eligibility for tuition assistance under the Tuition Assistance Program and does not make prompt reimbursement of the full amount owed to the University, the University may use payroll deductions (of not more than 25% of the gross amount of each biweekly paycheck) or other appropriate means to assure prompt collection of all forfeited tuition assistance amounts.

H. Tuition Reduction for Spouses, Domestic Partners, and Children

1. The spouse or domestic partner of any bargaining-unit member and/or children less than twenty-six years of age who are admitted to the University through its normal procedures shall be permitted to enroll in Wayne State University graduate and undergraduate courses at a cost of fifty percent of the regular graduate or undergraduate tuition rate per credit hour according to their student rank. The spouse, domestic partner, and/or children shall be encouraged to apply for appropriate scholarships and/or fellowships, the funding of which will reduce the amount of University assistance. Incidental fees shall be charged to the spouse, domestic partner, and/or children for such enrollment.
2. Children less than twenty-six years of age, of bargaining-unit members holding tenure or employment security status who died or became disabled while employed at the University, who are admitted to the University through its normal procedures shall be permitted to enroll in Wayne State University graduate and undergraduate courses at a cost of fifty percent of the regular graduate or undergraduate tuition rate per credit hour according to their student rank. The children shall be encouraged to apply for appropriate scholarships and/or fellowships, the funding of which will reduce the amount of University assistance. Incidental fees shall be charged to the children for such enrollment.
3. The tuition reductions described in H.1 and H.2 do not apply to registrations of students in the School of Medicine who are seeking the M.D. degree, students in the College of Pharmacy and Health Sciences who are seeking the Pharm.D. degree, and students in the Law School who are seeking the J.D. degree.
4. The bargaining-unit member, or the eligible survivor of a deceased bargaining-unit member, must apply for tuition reduction by the end of the term for which the reduction is requested by submitting a completed application to Benefits Administration.

5057 Woodward Ave., Suite 3301
Detroit, MI 48202-4050

Development Awards



Individual Development Awards Program

Program Guidelines

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Program Guidelines

Objective

The Individual Development Awards Program is designed to support a variety of professional development projects or activities by assisting eligible employees to develop their full professional potential and to prepare for advancement. Full-time employees who accrue annual leave are not required to charge those credits for any project or activity funded by an Individual Development Award.

The Campus Professional Development Committee administers the Individual Development Awards Program on each campus. Proportional allocations are assigned to each Campus Professional Development Committee based on unit member population. The Campus Professional Development Committee is required to dedicate a minimum of 15 percent of the funds under this program to part-time employees. If applications from part-time employees amount to less than 15 percent of the total funds, then the remainder from the set aside amount can be reallocated to awards for full-time employees. On campuses where more than 35 percent of the faculty are part time, the Campus Professional Development Committee should consider increasing the portion of funds set aside for part-time awards.

The maximum amount that can be awarded for each employee under this program is \$1,000. Employees may only be funded for one project or activity per award period.

The types of support available include:

- Registration fees for conferences or workshops.
- Consumable and non-consumable supplies.
- Travel and related expenses (includes lodging and meals).
- Research-related supplies.
- Tuition at the maximum allowable SUNY rate at the time of application.

Eligibility

- Full-time or part-time employees.
- Full-time employees must be in the bargaining unit at the time of the award and during the dates of the project or activity. Part-time employees who meet the eligibility tests for 26 weeks coverage for health benefits, and are eligible for health benefits during the summer, will also be eligible for funding for a project or activity that occurs during the summer whether or not they are on the payroll.
- The proposed project or activity must:
 - Enable the employee to meet one or more of the criteria specified in the following SUNY Policies of Board of Trustees: Title A. Evaluation of Academic Employees, §4. *Criteria* (a) - (e); Title B. Promotion of Academic Employees, §2. *Criteria* (a) - (e); or Title C. Evaluation and Promotion of Professional Employees, §5. *Criteria* (a) - (e), of Article XII Evaluation and Promotion of Academic and Professional Employees, of the Policies of the Board of Trustees.
 - Meet particular areas of interest or activities within the categories eligible for support as identified by the Campus Professional Development Committee.
- Projects or activities must fall within the following categories:
 - Basic, applied, or historical research.
 - Curriculum or instructional material development.
 - Workshop, seminar, internship, or course work not covered by Article 46, Program for Tuition Assistance or SUNY tuition waiver.
 - Conference participation or attendance.
 - Preparation of material for publication.
 - Grant proposal development.
 - Artistic or creative endeavors.
 - Professional reading or independent study.
 - Other work-related professional development projects or activities.

Application Process

A completed **Application**, with attachments, must be submitted to the Campus Professional Development Committee. Each Campus Professional Development Committee sets its own application deadlines and priorities within the guidelines for awards. Campus committees will normally announce awards by May and November of each year.

Attachments:

- An updated brief curriculum vita.
- A description of the project or activity including:
 - Type of event, event site, and sponsor.
 - Whether the employee is presenting a paper or formally participating. If presenting a paper, the title of the paper and nature of the presentation must be provided.
 - A letter of acceptance of the paper being presented or other proposal. If acceptance is pending, the Campus Professional Development Committee should be notified of its receipt as soon as possible.
 - How this project or activity will further the employee's professional development or otherwise assist in preparing for advancement.
- A brochure, announcement, or other relevant material describing the project or activity. If material is not yet available, information should be sent as soon as possible.
- A list of other grant support for the project or activity.
- **Budget Summary**. Provide expenditures to be incurred to complete the project or activity.
- Additional information may be requested by the Committee.

Program Evaluation

There is no requirement to submit a Program Evaluation to the JLMC. Each Campus Professional Development Committee determines the type of evaluation to be submitted to the Campus Professional Development Committee upon completion of the project or activity.

General Program Information

The General Program Information section provides information pertaining to the disbursement of New York State/United University Professions Joint Labor-Management Committees' funds, including application follow-up, acknowledgement of committee funds, expenditure limitations, reimbursement of expenditures, equipment policy, and contacts.

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SELECTED RESOURCES

Books and Journal Articles

- Avery, Elizabeth Fuseler, Deborah A. Carver, Therrin C. Dahlin, and Library Administration and Management Association Staff Development Committee. *Staff Development: A Practical Guide*. 3rd ed. Chicago: American Library Association, 2001.
- Connor, Elizabeth, MLS. *An Introduction to Staff Development in Academic Libraries*. New York: Routledge, 2009.
- Creth, Sheila D. *Effective On-the-job Training: Developing Library Human Resources*. Chicago: American Library Association, 1986.
- Flaspohler, Molly R. "Librarian Sabbatical Leaves: Do We Need to Get Out More?" *Journal of Academic Librarianship* 35, no. 2 (March 2009): 152–61.
- Gaskell, Carolyn, American Library Association, Association of College and Research Libraries College Libraries Section, and Allen S. Morrill. *Travel, Sabbatical, and Study Leave Policies in College Libraries*. Clip Notes; #30. Chicago: College Library Information Packet Committee, College Libraries Section, Association of College and Research Libraries, 2001.
- Neville, Tina M., and Deborah B. Henry. "Support for Research and Service in Florida Academic Libraries." *Journal of Academic Librarianship* 33, no. 1 (January 2007): 76–93.
- Pittman Blomberg, Donna, and Karen Chapman. "Survey of Travel Support Policies at ARL Libraries." *Journal of Academic Librarianship* 15, no. 2 (May 1989): 90.
- Ruark, Jennifer. "In Hard Times, It Pays to Increase Benefits, Colleges Are Advised." *The Chronicle of Higher Education* October 20, 2009. <http://chronicle.com/article/In-Hard-Times-It-Pays-to/48883/>.

Web Sites

Purdue University

Faculty Fellowships for Study in a Second Discipline

http://www.purdue.edu/provost/shtml/faculty/development/2nd_discipline.html

University of Rochester

Tuition Benefits for Employees

https://www.rochester.edu/working/hr/benefits/tuition/tuition_employee.pdf