

LIBRARY TRAVEL

Approved 8/26/98

Introduction

It is recognized that attendance and participation at professional meetings are of benefit to the Library organization and to the University as a whole. Furthermore, it is recognized that this type of professional development promotes intellectual growth and knowledge, broadens perspectives by providing an opportunity to meet and exchange information with staff from other institutions and encourages collaboration on issues affecting libraries nationally.

Professional development is defined as any endeavor that enhances the intellectual growth of a member of the library faculty or staff within that individual's profession, academic rank, or position and is directly or indirectly associated with enhancing opportunities for advancement in rank or position within the University Library or the University.

Professional development may include, but is not limited to, conferences, workshops, seminars, short-term courses, and training.

Travel:

For most professional development activities, it is necessary to travel. It is recognized that there should be compensation for such travel and that the levels of compensation will differ. Although travel funds are available for all full-time staff and faculty, priority will be given to requests for travel that will enable staff to be involved in national and regional/state library developments affecting the ability to support the teaching and research goals of the university, enhance the professional growth, development and reputation of the Library staff, and which will encourage librarians to meet tenure and promotion requirements. Additionally, some development activities may require no travel, but have registrations fees: those fees generally fall under the same policies as travel funding.

There are two basic classifications which travel may take: A) Required travel, and B) Elective travel:

- A) Required travel or development:
Travel that the Library Administration requests an employee undertake.
Generally, the employee acts as a representative of the institution and has the

authority to speak for the Library. The event may be a conference, workshop, or meeting or training. The purpose of the travel is to acquire information relevant and important to the running of the library. It may be a workshop, conference etc., which addresses a topic of high value to the library, and for which no one has expertise. In such a case, the attendee will/may be expected to train or educate others. Examples of and topics of such conferences, workshops, and meetings include: RACL, NT, AACRII, SOLINET, Endeavor, *etc.*

The Library should pay the entire cost of the registration, transportation, lodging, and per diem. It is expected that individuals will seek the most cost-efficient accommodations.

Also included in this category is travel undertaken for the purpose of delivery of materials, class instruction or maintenance of computer systems at off-campus centers.

Required travel shall be funded from a central pool, rather than charged against a librarian's allocation.

B) Elective travel or development (undertaken at the initiative of the employee):

These activities enable an individual to keep current in the library profession and in his/her subject fields, and to bring back information on topics of concern.

Included are those activities which promote professional growth or meet promotion and tenure requirements but which may not be mandatory for effective job performance. Funding will vary in accordance with the individual's level of participation in an organization, relevance to his/her position, relevance to the library, and the overall funds available for travel. The employee must be a member of an organization to receive any travel funds to attend any of its activities or meetings (ALA, ACRL, GLA, SELA, *etc.*).

Examples include service as an elected or appointed official of a professional organization, chairing a committee of a professional organization or participation on such a committee, leading a workshop, presenting a paper or poster session at a meeting, attendance at conferences or institutes.

Following is a more complete list of the types of events which could be considered for funding allocation:

- 1) **Presentations** (listed in priority order)
 - a) presentations at national library conferences
 - b) presentations at academic conferences where the presentation is in the discipline in which the librarian is liaison and where the

presentation includes discussion of library-related issues; or presentations at regional/state or local library-related conferences

- c) presentations at non-library-related academic conferences where the presentation does not pertain to library usage or where there is no academic relationship to the individual's library responsibilities.
- 2) **Participation** in professional organizations (national, regional/state, local)
Level of participation/involvement (*e.g.*, committee chair is considered to have greater involvement than a committee member)
 - 3) **Staff development:** travel or fees related to training or professional development
 - a) Training: participation in workshops, seminars, or other sessions to develop job-related skills and knowledge.
 - b) Professional development: travel undertaken to promote growth and knowledge. Broadens perspectives by providing an opportunity to meet and exchange information with staff from other institutions and to work together with them on issues affecting libraries nationally.
 - 4) **Continuing education** to promote improved work performance. Funded activities may include registration fees for on-campus courses needed for job performance enhancement (*i. e.*, not just for promotion purposes).

Approval Guidelines:

Current criteria used for authorizing travel and reimbursement:

- a) participants on program, then officers, then committee chairs and members, then members within a professional organization
- b) continuing education for job
- c) attend as a non-member of a professional organization whose function relates to a staff member's job responsibility
- d) past travel allocations
- e) staff must be a member of an organization to receive any travel funds to attend any of its activities or meetings (*e.g.*, ALA, GAIT, GLA, SELA, *etc.*)

The above definitions apply to travel by both library faculty and library paraprofessionals.

Release time is considered a form of payment for travel or development. All funded events will automatically carry release time. Employees may elect to apply only for release time.

Conferences, workshops, and training sessions may be general or specific, national, regional/state, or local.

Responsibilities of Travelers:

1) Submitting the request:

The traveler will submit a request for permission to travel, with estimated costs, to the supervisor in accordance with University and USG policies.

In the completed Request for Travel Authorization, it should be clear that the type of event, and the criteria for authorization are met. If it is not clear by simply filling in the request form, it is the responsibility of the requestor to provide additional information for the supervisor and library administration to make a considered judgment of the request.

The supervisor will review the request and approve or disapprove. If the request is disapproved, the supervisor will discuss the reasons with the employee. The employee may appeal a disapproval to the supervisor, and to the Library administration.

If an employee decides or is not able to attend a conference for which the money has been approved, the money goes back to the pool. It cannot be transferred to another conference or to another person. Each conference must be applied for separately.

2) Reporting:

After attendance at a conference for which there has been library support (including release time), the attendee is required to prepare a summary report to be shared with other staff members. This report may be presented via the libstaff listserv or as a presentation to the staff of the library. The attendee will decide which format to use: the information provided will correspond to established guidelines (which should include a review of conference highlights, benefit to library, how *** might be instituted at Ingram, *etc.*). At the supervisor's discretion, the attendee may also be asked to present a more in-depth departmental or library-wide report.

If the attendee is presenting at a conference, the paper should be mounted electronically on libstaff or on a Library-maintained site so that all can read -- or a shortened version of the presentation should be made available.

Due to staffing as well as funding problems/shortages, in accordance with a policy established in October 1997, it may not be possible for all members of a department to

attend the same meeting. Therefore, sharing of information in the form of training and teaching is an important staff development issue.

Funding

Two accounts will be maintained within the travel budget: a travel pool and allocated funds.

The travel pool will consist of \$6100.00 and will be used for all required travel (librarians and classified staff) and for development for classified employees. Specific funds will be allocated to each librarian; if not expended or encumbered by March 15 of each fiscal year, they will revert to the travel pool. The Director of University Libraries will be allocated \$2000.00, the Associate Director will be allocated \$1000.00. Other librarians will be allocated \$300.00 each. Allocated funds should be expended for elective travel or development, although pool funds may also be used in connection with elective activities (*i. e.*, while pool funds might be approved for elective travel, allocated funds will not normally be used for required travel).

Since the elective activities of the Director and Associate Director are difficult to separate from administrative functions, their allocations must be expended before any application is made to the pooled funds.

Dollar amounts indicated above can (and will) be changed as circumstances permit or demand.