

University Library Travel: Travel and Funding Guidelines

General Policy Statement

Professional development is a priority for the University of North Carolina at Chapel Hill University Library. The University Library regards professional development as a joint responsibility between the staff member and the Library. For that reason, individuals are expected to take some financial responsibility for their own professional growth in knowledge and skill and also to take the initiative in identifying courses, workshops, conferences, and other educational, professional, or skills-oriented opportunities. Professional development is supported by the University Library through funding and/or release time from employment responsibilities.

Types of Funding Areas

There are three funding areas associated with travel: assigned, required training, and professional development. These are defined as follows:

1. **Assigned travel** is required by Library Administration and is travel undertaken to conduct official library business.
2. **Required Training** activities funded by the Library are required for your job and are intended to develop and enhance skills, knowledge and other qualifications which promote current awareness of advances in your field, or to prepare you for additional assignments or positions within the Library. Training activities may also be related to current or future objectives of the Library, in which case you may be invited to participate and asked to share skills learned with others. Required training requires AUL approval and will meet an expressed need within the library.
3. **Professional development** travel funds are made available to allow staff to participate in activities which they deem necessary for personal professional advancement, especially as they relate to the Appointment and Promotion process for librarians, and to the continued professional growth for support staff. Professional development travel provides the opportunity to attend meetings, workshops, institutes, and conferences of professional organizations for the purposes of networking, presenting, and keeping current in the field and in the profession generally.

Funding Policy

1. Reimbursement for **assigned travel** is normally 100%. Travel under grants or contracts is considered "assigned" if it is chargeable to such grants or contracts, or otherwise approved in the grant budget (cost share). Advance approval and a *Travel and Funding Request Form* are both required.
2. Reimbursement for **required training** travel is normally 100%. Advance approval and a *Travel and Funding Request Form* are both required. Because there will always be budget constraints, employees are encouraged to seek funding partnerships with other departments when possible or travel scholarships if available.
3. Employees are assigned a flat rate of travel funding for **professional development** activities. Funds for professional development travel are allocated annually at the

beginning of the travel year, which runs October 1st through September 30th. Advance approval and a *Travel and Funding Request Form* are both required.

Professional Development funding may not exceed the annual allocation set at the beginning of the travel year. The current individual annual allocation for EPA employees is \$900. The current individual annual allocation for SPA employees is \$200. Additionally, in regard to Professional Development travel, travel funds from the Library's central travel pool may not be supplemented with other non-state/departmental funding (i.e. UL funds, NCC funds, MSS funds, etc.).

Decisions about which conference(s)/staff development activities to attend are made by individual employees; each staff member who is planning to request travel funds is encouraged to devise an annual travel plan and to discuss it with his/her supervisor. Your annual travel allocation will be expended as expenses are reimbursed. Funds cannot be applied retroactively nor carried forward.

SPA Non-exempt staff are encouraged to seek development opportunities within the local area, and attendance at training and development meetings must be strongly related to position responsibilities, as time attended is considered time worked under the Federal Fair Labor Standards Act. Non-exempt employees must include travel time to and from meetings as time worked. Non-exempt staff and their supervisors considering requests for travel authorization outside of the Triangle should consult with their AUL for approval and must consult with the Library Personnel Office in advance for guidance on complying with Federal rules and regulations and University policy regarding SPA travel. Please review the University's Travel Time policy: (http://hr.unc.edu/policies-procedures-guidelines/spa-employee-policies/wage-hour-policies/CCM1_018216)

Funding expenses for professional development travel may vary by trip. With greater funding and greater flexibility in using those funds also comes the responsibility of using those funds wisely and being responsible stewards of the library's resources. Unnecessary or excessive travel expenses provide questionable benefits to the Library at large, and place unnecessary strains on an already tight budget. Please refer to the *University Library Travel Policy: Travel Tips* for guidelines on how to manage expenses.

4. Exceptions to the travel policy may be brought to the Library Administrative Council through the appropriate administrative channels.

Procedure to Request Funding

The *Travel and Funding Request Form* is completed for all three types of travel if funding reimbursement will be requested. The *Travel and Funding Request Form* is completed by the traveler and routed to the Department Head for signature.

- For Professional Development Travel, the completed and signed form is then routed to Helene Davenport in the Library Administrative Office
- For Required Training and Assigned Travel, the form is routed to the AUL for signature and then to Helene Davenport in the Library Administrative Office.

Forms should be turned in no later than two weeks prior to in-state travel; four weeks for out-of-state travel. A copy of the form, indicating funding approval will be returned to you

prior to travel; a copy will also remain on file with Helene Davenport in the Library Administrative Office.

Additional Travel Funds for Those Seeking Elective Office

If an employee is running for elected office that may require additional travel, *prior to accepting the nomination*, the employee should consult with his/her supervisor, AUL and Library Director regarding time away from work and additional funding through **Assigned Travel** for extra trips.

Any activity that you agree to participate in that could result in a request for additional funding should be discussed in advance with your department head and AUL before agreeing to participate.

Travelers Insurance for International Travel

Travelers insurance is available for international travel. For more information, please consult with Helene Davenport in the Library Administrative Office well in advance of the actual dates of travel.

Unexpended Funds

If an employee does not spend his/her entire annual professional development travel budget within the travel year, the remainder will be returned to the general operations budget. There is no carry-over for individuals who did not spend the entire allotment during the travel year.

Revisions and Cancellations

A traveler must receive approval before traveling on assigned or training travel if s/he learns that the cost of the trip will be greater than the amount originally requested and approved.

A traveler who cancels an approved trip must immediately notify the department head, AUL and the Travel Officer / Library Fiscal Services. If costs have been incurred by the Library (e.g., registration or airfare) the employee will be expected to repay the expenses unless the cancellation was at the request of the Library with approval of the Library Director. 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 amend his/her copy of the approved travel request form and send the form to the Library Fiscal Services Department.

Upon Return and Requesting Reimbursement

Upon returning from a conference or meeting, a staff member is encouraged to prepare a brief report of observations and activities for one's department or unit. In some cases, this may be required by the department head or AUL. Noteworthy reports of general interest or significance may also be submitted to Library Line or the Staff Newsletter for sharing with all Library staff.

Within thirty days of returning from travel, original receipts must be returned to Helene Davenport in the Library Administrative Office. Original receipts or vouchers must be provided for out-of-pocket expenses, including air or rail travel, lodging, airport parking and airport shuttle, and registration. Copies of invoices and receipts are not acceptable for payment and/or reimbursement unless the original is not provided by the vendor. *Please keep in mind that out-of-pocket expenses paid in advance will not be reimbursed until after the completion of the trip.*

All receipts for reimbursement must be submitted at the same time, within 30 days of your return. No receipts are needed for meals (with the exception of donor meals, which require original

itemized receipts—See Ellen Bowman in Accounting Services for more information). When submitting your documentation for reimbursement, be sure to include:

- Airfare receipt, which must show traveler's name, amount paid, *and confirmation that ticket was used* (boarding pass/receipt)
- All ground transportation receipts—this includes parking, taxi, bus, shuttle, metro, etc.
- Commercial lodging receipt, which must show traveler's name, amount paid, and number of people in the party sharing the room. When sharing a room, each employee must show where he/she paid his/her part of the room. Try to get separate receipts when possible. When using express checkout, be sure to stop by the hotel desk to pick up a receipt showing balance zero. Traveler may attach a credit card slip/statement or canceled check to prove payment. Expenses incurred for lodging for family members will not be reimbursed.
- Provide registration fee receipts
- For all other expenses, provide receipts

Additional expenses that will be incurred as a result of combining business travel with vacation travel, or because family members are traveling with the Library employee, will not be reimbursed.