

UO LIBRARIES

Professional Development/Travel Funding Policy

Revised: May 15, 2017

The UO Libraries supports professional development, research, engagement, and service through library-sponsored training opportunities, approved leave time, and the following funding allocations.

A. Strategic, directed travel

1. Library Administration will set aside approximately \$30-50,000 in unrestricted gift funds for directed and/or strategic travel each year. All library employees, including classified staff, CMET, PDX, and limited-duration classified employees, are eligible for funding from this source. (In other words, employees with temporary-employment status are not eligible for funding from this source.)
2. This type of funding will also be used to pay for approved travel related to the UO Libraries' organizational memberships and other library-level commitments, including but not limited necessarily to the following examples:
 - ARL – 1 to 2 trips annually for dean or proxy, 1 optional trip for selected Forum participant
 - CNI – 1 to 2 trips annually for dean or proxy, 1 optional trip for selected participant
 - Code4Lib – 1 trip annually
 - EDUCAUSE – 1 to 2 trips annually
 - ELUNA (Ex Libris) – 1 or 2 trips annually
 - Foundation Center – 1 trip annually
 - GWLA – Annual meeting, 1 for resource sharing, 1 for collections, 1 for Council
 - HathiTrust – 1 trip annually
 - Hydra Connect – 1 participant, annual meeting
 - INSTRUCTURECON – 1 annually
 - LOEX – 1 trip annually
 - MWDL – 1 trip annually
 - NWILL – 1 trip annually
 - Off-campus library locations to Eugene campus, vice versa – All travel related to UO work between Eugene campus and other library locations (e.g., OIMB, PDX)
 - Online NW – 2 trips annually
 - Orbis Cascade Alliance – All travel related to appointed UO representation; varying numbers for Alliance work group members and/or other summer meeting participation
 - PCC (BIBCO/CONSER) – 1 to 2 trips annually
 - UO Libraries-initiated presentations given by library faculty/staff/OAs
3. A maximum of five possible Solari Incentive Awards will be awarded each year. These awards include professional travel as well as research proposals. The money available for all Incentive Awards will be capped to keep from overspending the account (currently projected to be roughly \$18,000).

B. Professional support for permanent-status NTTF members and OAs

Beginning in FY17, Library Administration will allocate a specific annual amount for professional development and travel for Career NTTF and OAs with *permanent-employee* status. (In other words, annual allocations are not provided for those with temporary-employee status.)

Career NTTF members will receive a specific amount through the PSA (professional support account). Career NTTF members would then have discretion over how to spend the PSA for in-state and out-of-state travel, and other professional needs, as described herein.

OAs will receive a specific amount, which will then be allocated to their respective departments for professional development, training, and travel to be used at the discretion of heads/managers in consultation with the OAs in their departments.

1. There are no policy-based restrictions on the number of trips or requirement for early-bird registration when spending these individual allocations, as long as supervisory approval is obtained as usual.
2. Motor pool expenses for in-state travel will be covered centrally to not overcomplicate the mechanics of implementation. If individuals choose to use their own vehicles, this would come from the allocations noted in this policy.
3. Designated allocations will be determined before the start of each new fiscal year, and will depend upon the Libraries' salary-savings levels. At the current level, the preliminary plan will designate \$1,400 per year for post-6th year Career NTTF and OAs; \$2,000 per year for pre-6th year Career NTTF. These amounts will *not* be prorated for Career NTTFs or OAs working at least half time but less than full time with permanent-employee status; and *will* be prorated for those working less than half time with permanent-employee status.
4. PSA Allocations for Career NTTF members can accrue, but only a maximum of \$1,000* per individual is allowed to carry-forward from one fiscal year to the next. (For example, if an NTTF member wishes to save funding for an international conference in FY18, the individual can save \$1,000 from FY17 into the next year. When a new allocation of \$1,400 is received in FY18, the individual would then have \$2,400 for spending in FY18.). Allocations for OAs, managed at the departmental level, cannot accrue or carry-forward from one year to the next.
5. Career NTTF allocations in PSAs are non-transferable, whereas OA allocations are transferable at the discretion of managers/heads in consultation with OAs in their departments.
6. Allocations may not be paid out in cash. This is not compensation but rather a commitment to fund approved professional development, training, and travel. Reimbursement must follow UO travel policies at <http://ba.uoregon.edu/staff/travel>.
7. PDX, CMET, and Law will continue to be budgeted separately and fund their own travel from general-fund carry-forward; however, PDX and CMET will adhere to the new guidelines for funding levels and reimbursement. Law is covered under a separate MOU that provides Law with more autonomy in budget-related areas.

C. Other travel funds

1. Library Administration will continue to supplement the income from the Library Professional Development Endowment Fund (24-3022). This endowment generates roughly \$2,150 per year. Administration will increase the annual supplement from the Solari Faculty Endowment to allow the LFOA Grants and Awards Committee to make a total of \$10,000 in awards per year.
2. Individuals can make use of other sources of professional travel funds such as sponsored projects (external grants), internal (UO) grants and awards, paid speaking engagements, etc.

*As we implemented this new policy in FY17, any Individuals with more than \$1,000 in their PSAs at the close of FY16 were permitted to have higher carry-forward maximum amounts temporarily. When FY18 began on July 1, 2017, the maximum carry-forward limit of \$1,000 began to apply to all Career NTTF members.