

2011/2012 Professional Development Funds

On this page:

[Time Frame](#)

[What Your Allocation May Be Used For](#)

[Funding Sources Beyond LAUC-LA](#)

[Planning Your Trip](#)

[While You Are Traveling](#)

[Reimbursement](#)

See also:

[Key Facts for Travelers](#)

[Call for Mini-Grants](#)

[Staff Development Fund](#)

For 2011/2012, each eligible LAUC-LA member is allocated \$730.00 in professional development funds to be used for travel, conference registration, educational, or other suitable purposes of your choice. You do not need to submit a request to the Committee before using these funds.

Time Frame

This allocation may be used for Professional Development activities occurring between August 1, 2011 and July 31, 2012. The deadline for requesting reimbursement for ALA and AALL is the first business day in August. These funds cannot be carried over from one year to the next.

What Your Allocation May Be Used For

The allocation should be spent on typical costs associated with professional and scholarly meetings, workshops, institutes, symposia, etc. (e.g., registration, meals, lodging, travel -- either common carrier, mileage, or car rental). It can also be used to fund classes that are directly related to Criterion 1 responsibilities, or other relevant professional or scholarly activities. Several other types of professional development expenditures are not eligible for Professional Development funding. These include the purchase of books, software, hardware, journals, or association membership dues.

Funding Sources Beyond LAUC-LA

Additional types of funding may be available to librarians. Individual units may have staff development funds that can be used for class registration, books, or miscellaneous fees directly related to Criterion 1. Such funding is especially appropriate for newly appointed librarians and for those assigned new responsibilities. Check with your Unit Head for the availability of this funding. Also be aware that many professional associations offer grants to cover the costs of conference attendance.

Planning Your Trip

Corporate Travel Card – Travel & Entertainment (T&E) Card

- US Bank Visa card
- Provided to University travelers for charging business travel and entertainment expenses
- May not be used for personal expenses

Leave Approval Form

- Applies only to library departments and units reporting to the University Librarian

- Complete form 100-1-A (Request for Leave and Funding) or 100-1-B (Request for Official Leave)
- Obtain Supervisor, Department Head, and AUL signatures before routing to Library Human Resources (LHR)
- University Librarian Gary E Strong must approve foreign travel
- Do not make any travel arrangements until form is approved

Insurance Certificate

- If traveling out of California, UC employees must register for travel insurance at <http://www.uctrips-insurance.org/>

Air/Travel Arrangements

- Need to make your own travel arrangements
- Must use the Travel Center (x62639) to be reimbursed for plane reservations or to have airfare charged directly to the Library
- Can also make hotel, train, and car reservations through the Travel Center
- Traveler is responsible for verifying the itinerary and must cover 100% of the cost of any post booking changes if traveler did not notice a problem with the flight when the reservation was booked
- To charge your airfare directly to the Library:
 1. Notify Linda Taketomo at taketomo@library.ucla.edu by forwarding Travel's email (with the link to your itinerary)
 2. Indicate that you have reviewed the itinerary and the reservation can be ticketed
 3. Indicate the purpose of your trip and the account to be charged
 4. You should normally return the same day the conference or class ends, unless a flight would be difficult late in the day
 5. Linda can issue a PTA (Pre-Trip Authorization) to Travel for state fares and published fares if your Request for Leave and Funding Form is on file with LHR
- When booking business reservations through UCLA Travel with a personal stopover
 1. Travelers are required to charge a personal credit card and will be reimbursed for the business portion of the trip upon their return
 2. At the time the reservation is booked, travelers should obtain in writing (email or itinerary) the price of the direct business flight from the UCLA Travel agent
 3. Travelers should provide this information when they submit their request for reimbursement
- Ground Transportation Limitations vs. Equivalent Air Travel Cost (when surface transportation is used in lieu of air travel):
 1. Mileage reimbursements shall not exceed the equivalent economy/coach fare plus transportation costs to and from the terminals
 2. Prior to the trip, travelers must obtain a written quote from UCLA Travel and provide this information with their reimbursement

Hotel Arrangements

If travelers plan to submit a request for hotel reimbursement:

- Need to provide an original itemized receipt from the hotel
- Travelers may not book their lodging through online sources (such as Expedia, Hotels.com, Travelocity, etc)
- These services and the hotel cannot provide the required itemized hotel receipt
- Due to IRS regulations, UCLA cannot reimburse travelers for hotel/lodging expenditures for which the traveler cannot provide an itemized receipt

Lodging site must be more than 50 miles from traveler's residence or office:

- Lodging site within a 50-mile radius of the traveler's residence or office (the lesser of the two) requires approval by UCLA Travel
- You need to provide justification for the stay when you submit your request for reimbursement so it can be included with your expense report
- Travel Accounting needs to review and approve

Conference Registrations

If you wish to have UCLA pay your registration fee directly to the vendor:

- Five weeks before the registration deadline, submit your registration form to Linda
- Indicate which account should be charged

To reimburse registration fees paid with own personal funds:

- Personal funds cannot be reimbursed in advance of the conference/meeting unless your UCLA Travel and Entertainment (T&E) Card is used
- Travel Accounting requires the registration form as well as proof of payment
- Registration form will show the components of the amount paid (such as meals or extra-curricular activities) and help determine what amount should be reimbursed
- Copy of the front and back of your cancelled check is required (or copy of checking account statement if bank does not return cancelled checks)
- Credit card statement is required if the registration form or receipt does not indicate that a credit card was charged

If you register via the web:

- Print a copy of the completed registration form before hitting the continue/submit button
- Print the receipt

While You Are Traveling

Receipts:

- Original air ticket or original train ticket receipt
 - Original baggage fee receipt
 - Original car rental receipt
 - Original hotel bill
1. If hotel bill does not show a zero balance, provide the credit card receipt you received upon check-out
 2. If credit card receipt is not available, contact the hotel and have them fax an

- itemized receipt that indicates the balance was paid in full
3. Submit the original receipt and the faxed copy showing a zero balance for reimbursement
- Meals:
 1. Travelers must claim actual meal expenditures
 2. Will be reimbursed up to a daily limit of \$64 for domestic travel (\$64 includes meal tips, tips for housekeeping, baggage, etc)
 3. Do not assume you should receive \$64 per day no matter how little you spend
 4. If you are submitting a receipt and it has more than one person's meal
 - a. Add up your own portion and annotate it
 - b. Deduct alcohol and its related tax and tip from bill
5. Change in policy effective September 1, 2008
 - a. For meal reimbursement, travel must be for more than 24 hours with an overnight stay verified by a lodging receipt. Some exceptions to this requirement may apply.
 - b. For a trip of less than 24 hours that includes an overnight stay, the maximum amount for a single day (\$64) shall be authorized for the entire trip, even if the trip takes place over two consecutive days
- Receipts are required for expenditures equal to or greater than \$75.00
 - Itemized receipt is required (IRS regulation) for entertainment expenses
 - Mileage, 55.5 cents per mile (effective July 1, 2011)
 - Original receipt required for car rental
 1. UCLA Travel to obtain good corporate rates that include insurance
 2. You will not be reimbursed for insurance if you pay extra for it
 3. To save on fuel costs, travelers should fill up at a gas station
 4. If gas is obtained at the rental car location, justification is required on why fuel was not purchased at a gas station

Reimbursement

- Itemize your expenses on the Library Travel Reimbursement Form (available as an Excel document on the [LAUC-LA Web site](#)) and submit it with required receipts to Linda Taketomo in Library Business Services
- Linda will transfer the data to the Express system
- You can obtain a copy of the Travel reimbursement Form at the following web address: <http://unitproj.library.ucla.edu/lauc/la>
- Your reimbursement request must include (when and if applicable): dates and city of attendance, with departure and return dates and times
- Policy requires the business purpose of the trip or event to be stated in the reimbursement claim
- Justification needs to reflect "who, what, when, where, and why" of the event and specifically the business benefit to the University
- For travel to meetings and conferences, providing an agenda and an explanation of your participation is a good way to document the business necessity
- When an expense report does not contain enough detail, Travel Accounting

- must return it to obtain clarification
- Don't cause extended delays by waiting to be asked for enough information
 - Don't cause additional scrutiny by having insufficient justification
 - Reimbursements will be forwarded electronically to your checking account, if you are on direct deposit
 - If a non-Library department handles prepaid expenses (such as registration, airfare)
 1. Provide a copy of your registration form and itinerary along with the BruinBuy order or PTA numbers they were paid on
 2. This information is required in the travel reimbursement system
 - Your allocation may be sufficient to cover funding for more than a single event. (Contact Linda if you wish to check on your balance)
 - University policy states that claims must be submitted within 21 days after the end of a trip

Foreign Travel:

- Will be reimbursed based on actual costs incurred for lodging, ground transportation, etc
- Original receipts required for all expenses (except meals)
- If a receipt cannot be obtained, keep track of your expenses so you can claim them when you return
- Meals and incidental expenses will be reimbursed based on the federal per diem rate
- Actual lodging will be reimbursed up to the maximum federal rate for lodging
- If travelers plan to submit a request for hotel reimbursement, they need to provide an original itemized receipt from the hotel. See Hotel Arrangements listed above for policies.

If you have any questions or need additional information, please contact the Chair(s) of the Research and Professional Development Committee.