Guidelines for Submitting Librarian Development Fund Requests
(Article 34 Funding)

Contents
I. General Guidelines & Spending Cap Policy
   - These guidelines apply to all USF Librarian Development Fund (LDF or Fund) requests. They are based on and supplement the University Travel and Entertainment Policy. [http://usfca.edu/Business_and_Finance/Travel_and_Entertainment_Policy/](http://usfca.edu/Business_and_Finance/Travel_and_Entertainment_Policy/).
   - Librarian Development Funds are intended for librarians to enhance their professional effectiveness. If the Dean requests your attendance at an event as part

II. Requests requiring funding from two consecutive LDF fiscal years

III. Submitting LDF Requests

IV. Specific guidelines for the categories on the request form

V. Revisions to a Funding Request

VI. What Librarian Development Funds do not pay for

VII. Trip changes and cancellations

VIII. Reconciliations

IX. Purchasing Card Policies
of your professional responsibilities, the Dean’s Office should be responsible for covering the expenses. If there are questions as to where funding should come from, the LDF Committee will review each request on a case by case basis.

- The LDF fiscal year is August 1-July 31 to accommodate ALA Annual conference dates and the University’s transfer of new funds to the LDF, which normally takes place in October or November. At the end of the fiscal year, any unused funds will remain in the Fund and carry forward to the next fiscal year for disbursement among all librarians.

- Effective Sep. 1, 2011, there is no spending cap for use of the Fund. The LDF Committee will review funding, the fund balance, and possible spending caps on or around Feb. 1 and Aug. 1 of each year. New spending caps will be announced on or about August 1 of each year, consisting of the unspent balance in the LDF fund plus the estimated amount of the USF deposit, in accordance with the USFFA Collective Bargaining Agreement (CBA) in effect. To calculate increases in the Faculty Development Fund as a whole, the University uses a formula outlined in CBA Article 34 that is based on the annual increase in the Bay Area Consumer Price Index. The amount allocated to the Fund is based on the number of FTE USFFA librarians.

- Avoid using your P-card for conference costs prior to committee approval. If you use it before your request is approved and it turns out that your requested funding is not approved, you will be responsible for reimbursement to the Fund.

- Requests must be submitted with, at minimum, the following documentation showing prices: registration form, airfare search (show as “estimate” if still monitoring prices), and hotel rates. If there are questions, the committee chair will contact you asking for further information.

- For local conferences & events (less than 50 miles from USF), the Fund will pay the registration costs, meals during the conference times, and travel (outside normal commute); this includes public transportation or mileage for personal vehicle use as well as bridge tolls and parking.

- While you are responsible for monitoring your expenditures to make sure you stay within budget, you must also submit a reconciliation report to the LDF Committee upon completion of travel or an event, showing your actual amount spent. Please submit no more than 30 days after completion of event.

- The amount approved for each travel request is your maximum allocation of University funds for that particular trip; please do not exceed that amount without consultation with the LDF committee.

II. Requests requiring funding from two consecutive LDF fiscal years

- If you are requesting funding for a single event that required spending in two consecutive LDF fiscal years (before and after August 1), please indicate that the
request spans two fiscal years. **Important: Specify how much you are requesting for each year.**

- If the *Year One* portion of your request is approved, the *Year Two* portion will be provisionally approved.

- At the beginning of *Year Two*, after any spending caps are announced, the LDF committee will determine whether there are funds available to the requestor for the *Year Two* portion of the request and formally approve or deny the request.

- If funds are not available for the *Year Two* portion of the request, requestor may either choose to pay for the difference him/herself, or cancel the trip. If the trip is canceled, the requestor must refund the Fund for any amount spent on the trip in *Year One*.

### III. Submitting LDF Requests

Submit funding requests as early as possible before the event; at a minimum, the committee needs two weeks’ notice to review the request and submit approval to the Dean’s Office. Requests submitted after an event cannot be accepted.

Use link to enter a new request:

[https://pf.usfca.edu/PerfectFormsSSO/player.aspx?f=7LAgAgYE](https://pf.usfca.edu/PerfectFormsSSO/player.aspx?f=7LAgAgYE)

log in with your USF Connect information.

Complete Submitter, Activity and Plan particulars

Enter any expenses that apply to the funding request.

For nightly hotel cost calculate the true nightly rate (nightly rate + taxes)

Total expenses will auto populate.

Attach a documentation for expenses that apply to the funding request

Enter any additional attachments or notes about the request.(note field limited to 99 characters)

Submit form, a confirmation email will be sent.

Email will be automatically sent to the appropriate approvers in the chain. The form will travel from approver to approver from Department Supervisor to Fund Committee, to Dean.

Submitter’s travel request is “view only” and cannot be changed by the submitter or any approvers.

If request is denied, comments will be added to form and sent to the chain of approvers and submitter via email.
If a request needs modification, the form will be denied and a new form will need to be submitted.

Once request receives final approval from the Dean an email will be sent to submitter. All submissions will have the subject line “LDF Request - [Full Name] [Instance Number].” Include this in all communications regarding the request particularly the reconciliation.

All emails to Submitter and Approvers will be sent from sender LDF Request E-Form with donotreply@usfca.edu email.

IV. Guidelines for the categories on the LDF request form

Outline of Plans/Intent: Please describe the purpose of requested Fund expenditures and how they relate to your professional development. Be sure to include the name and nature of any add-ons (pre-conferences, etc.) for which you are requesting funds. In this space you can also explain matters such as revisions or requests for funds spanning two fiscal years, or other necessary and relevant explanations.

Travel: You are strongly encouraged to use the University travel agent, accessible via Concur Travel. However, airline tickets for personal travel or family members may not be booked with Concur Travel until further notice.

Airline tickets In general, book your air travel by the most direct route, in economy class, and at the lowest airfare available. Exceptions may be granted to fly business class only for international travel or for a documented medical reason. If additional personal travel is added on, you may not use Concur Travel for booking, and you must pay the additional cost. If the added cost cannot be determined separately, the average round trip fare to the conference site will be allowed. The University will pay for one checked bag to transport the traveler’s personal belongings, as well as the cost to check any baggage necessary to support the business purpose of the trip (e.g., meeting materials and equipment, etc.) The per trip dollar limit for air travel within the continental United States (CONUS) is set forth in Appendix A to the University Travel and Entertainment Policy. http://usfca.edu/Business_and_Finance/Travel_and_Entertainment_Policy_-_Appendix_A/

Personal Vehicles: You may use a personal vehicle when it is more cost-effective than purchasing a round trip economy airline ticket or using alternate forms of ground transportation. Reimbursement is based on the actual distance from the starting point to the destination by the most direct route, multiplied by the Internal Revenue Service (IRS) standard mileage rate in effect at the time of travel. The IRS mileage rate covers all expenses incurred in connection with the use of a privately-owned vehicle, including fuel, insurance, maintenance, depreciation, and other cost associated with the use of the vehicle. The IRS standard mileage rates for the use of a personal automobile are in Appendix A.
The number of miles eligible for reimbursement will be calculated by Concur, using an on-line mapping service, based on the starting point and destination addresses you enter into Concur.

The starting point could be either your workplace or your home, whichever is closer to the destination. Only expenses for travel outside of your normal commute are reimbursed.

Necessary and reasonable charges for automobile-related expenses are reimbursable when either a personally-owned vehicle or rental car is used while traveling on University business, including charges for road tolls, ferries, bridges, tunnels, parking, etc. Gasoline for business-related trips will be reimbursed only for rental cars. If a personal vehicle is used, reimbursement for gasoline expenses is included as part of the IRS standard mileage rate.

**Note:** Employees who use their personal vehicle for University business should have insurance coverage at the levels recommended in USF’s [Vehicular Use Policy](http://usfca.edu/Business_and_Finance/Vehicular_Use_Policy/).

**Hotel:** The Librarian Development Fund will pay for the duration of the conference at either the conference hotel(s) or other, similarly priced accommodations at commercial class hotels and motels for conferences and events that are 50 miles or more from USF. On the request form, indicate the rate per night and the number of nights. Include all applicable taxes in your total. For travel within the Continental U.S., you can be reimbursed for your actual cost of lodging and meals based on original itemized receipts. The maximum reimbursement for lodging and meals is limited to the daily amounts set forth in Appendix A.

**Meals:** You may use your p-card or request reimbursement for the amount in Appendix A (currently, up to $75 per day within the continental U.S.) for food while attending an event or conference more than 50 miles from USF. This includes meals on travel days to and from the event, but not meals already included as part of conference registration fees.

For local conferences (less than 50 miles from USF) only meals during the actual conference times are reimbursable. For example, if the conference is 9am – 4pm and lunch is not included, lunch will be reimbursed; for a conference that runs 9am - 9pm, lunch and dinner will be reimbursed.

**Registration:** The Fund will pay registration costs for conferences and pre-conferences. Payment for “Early bird,” Preliminary or Advance registration rates are highly encouraged. On-site registration will not be covered; anyone who pays that rate must cover the difference between regular registration and the on-site rate out of their own pocket, or reimburse the Fund. For ALA (and affiliate) conferences in particular, the Fund will pay only for “early bird” and “advance” registration.
**Ground Transportation:** Airport shuttles such as SuperShuttle, taxis and other ground transportation are reimbursable, as is long-term parking in lieu of ground transportation. Costs of public transportation, airport shuttles and taxis, including reasonable tips, are acceptable services to and from airports, meetings, and hotels and are reimbursable.

**Internet Access:** The Fund will also pay for reasonable, business-related use of the Internet if it is not included in the price of the conference hotel.

**V. Revisions to a funding request**

When your total amount requested for an event increases for any reason, you must submit a new request, approved by your Department Head, to the LDF committee. New requests may not be submitted after the event takes place.

**VI. What Librarian Development Funds do not pay for**

See also USF’s Travel and Entertainment Policy, Appendix B:  
http://usfca.edu/Business_and_Finance/Travel_and_Entertainment_Policy_-_Appendix_B/

- Memberships in professional organizations even if that would qualify you for a lower registration rate. Either join on your own or register at the non-member rate.
- Late registration fees.
- Equipment, hardware, or software.
- Attendance at recreational “add-on” conference events such as local tours.
- Attendance at non-conference events.
- Fees for guests to attend conference events or activities
- Additional fees for early boarding, security pre-screening, extra leg room, and similar additional fees are not chargeable to the Fund and must be reimbursed if a P-Card was used for purchase.
- Overnight stays for local conferences and events (less than 50 miles from USF)

**VII. Trip changes and cancellations**

If you must cancel a trip, notify the Committee immediately. Try to obtain a refund or credit for any paid expenses.

- University travel policy regarding airline tickets: If a traveler must cancel an airline ticket, and a credit towards a future purchase is received, the credit must be used towards the traveler’s next University business trip. The University will not reimburse travelers for tickets obtained with frequent flier miles. With regard to Librarian professional development, “next University business trip” means future LDF travel.

- When you use the credit for your next LDF trip, you will only need to request the difference between the credit and the price of airfare. You should make note of this on your request.
• For cancellations for any reason other than documented illness, family emergency, or other unavoidable and documented circumstances, amounts not refunded must be reimbursed to the USF Librarian Development Fund by the requestor.

VIII. Reconciliations

• After your return from a conference, please email a travel reconciliation -- the actual amount spent -- to the LDF committee as soon as possible. This enables the committee to recalculate the balance remaining in the fund as well as your available spending cap balance, if applicable.

• When submitting your reconciliation, please use the same email header as your original request: [YOUR NAME] LDF request [name of conference and month-year]. Example: Jackson LDF request NASIG June 2013

• When submitting your reconciliation, please put the total amount spent in the body of the email.

IX. Purchasing Card Policies

See also:
USF Purchasing Card Policy:
http://www.usfca.edu/Business_and_Finance/Purchasing_Card_Policy/

P-Card FAQ:
http://www.usfca.edu/busfin/pcard/faq/

Travel and Entertainment Procedures:
http://www.usfca.edu/Business_and_Finance/Travel_and_Entertainment_Procedures/

If a traveler has a Purchasing Card authorized for travel and entertainment, the traveler must use the card to pay for business-related expenditures, maintain the required documentation, obtain approvals, and reconcile all charges in the Concur Reporting System. In addition, the business purpose of each travel and entertainment-related expenses must be clearly indicated in the Concur Reporting System.

Submit receipts with your Concur expense report:
Remember that receipts for all expenditures of $50 or more, must be submitted with your expense report or Purchasing Card reconciliation. The Librarian Development Fund reimburses under the Actual Expense Method and does not use the Per Diem Method. Lodging/itemized folio:
The P-card transaction amount on your expense report should be for only the room, taxes, meal, business-related use of the Internet, and/or other business-related charges previously listed on your approved Travel Request. Make sure to obtain an itemized hotel folio upon checking out of your lodging, and include it with your Concur expense report if an e-receipt is not provided.
Internet fees:
Any internet expenses that are paid at an internet café or elsewhere (i.e. not through the hotel) are covered by the LDF as long as they are listed on your Travel Request form. These charges should be listed on your expense report with a fund allocation of Internet, Telephone, Cable TV 712110.

Groceries:
If you buy food from a market to eat over several days instead of eating at restaurants, list the total amount on your expense report as Travel Meals 716430 and explain in the Comments. For example, you could indicate “breakfast for 6/4, 6/5 & 6/6” or “breakfast 6/4, lunch 6/4, breakfast 6/5”.

Personal Purchases:
P-card policy restricts use of the purchasing card for personal purchases. This includes added personal expenses at hotels. If you sign for personal purchases in your hotel room (i.e. movies, video games, laundry) you must pay for those items yourself before settling the bill with your USF P-card. Most hotels will split out any expenses you wish to pay separately.

Only in extreme circumstances should a personal purchase that needs to be repaid to USF end up on your p-card. An example might be on a hotel bill when you had to do express checkout because you overslept and were running late to get to the airport for your flight. However, it is up to Purchasing Card Services, not the LDF Committee, to follow up with anyone who consistently engages in the practice of charging personal expenses to a p-card.

Although personal charges on the University purchasing card are prohibited, if one is made accidentally, a reimbursement check needs to be made out to USF and sent up to Accounting and Business Services (LMN 3rd FL) with attention to P-Card manager. Please note in the memo line that the check is for a personal reimbursement. In your expense report click the box “personal (do not reimburse)

Concur Expense Report:

**IMPORTANT:** Double-check each expense item before submitting your expense report. All LDF fund reports should be assigned the following FOAP numbers:
FUND 259010, Faculty Development Gleeson Library
CHARGING ORG. 351001

Frequently used Concur expense codes for LDF travel:

Travel Meals 716430
Hotel & Lodging 716210
Conference Registrations 716610
Internet, Telephone, Cable TV 712110
Airfare 716010
Car Rental 716020
Ground Transport, Tolls & Parking 716030
For questions about Purchasing Card Services, please contact:
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