CONTINUING EDUCATION, TRAINING, AND TRAVEL: PROCESS FOR SETTING BUDGET AND IMPLEMENTING DECISIONS

February 27, 2001

PROCESS:

STEP 1. Gathering estimated expenses. August 1-30: Department heads consult with their Staff members to make specific plans for training expenses for the period from Sept. 1-August 30 of the coming year. Use the “Law Library REQUEST FORM, Staff Education” to estimate expenses. Allocations for the Staff and Hourly Training Committees, and for Director/Department Heads’ discretion, will be assumed at $2,000, $2,000, and $3,000 respectively at this stage.

STEP 2. Making decisions: During September, Department Heads and the Director will review the requests and grant them, or make adjustments to meet the Library’s needs, to approve as much as possible. Some decisions may be deferred, but staff members will be informed of decisions/deferrals by the end of September. Forms will be returned to the department heads with decisions on them.

STEP 3. Keeping track of decisions made: Admin will keep a copy of the form, with the decision; and return the original to the staff member, who can then complete arrangements at the appropriate time.

STEP 4. Arranging for the education itself: Staff members have a choice between having Admin make arrangements and pay in advance; or making arrangements and paying with reimbursement after the fact. See “Travel Information for Law Library Staff” for information about doing either.

a. For Admin to make reservations, register, and pay in advance: Supply Admin with a copy of the approved form, completed registration forms for the meeting and any hotel accommodations, and a printout showing flight preferences, and any other required documents.

b. For the staff member to make arrangements and be reimbursed by the Library after the fact: Supply Admin with the approved form, and receipts for all expenses over $25, and a description of any expenses under $25. See sheet from Veronica for further details about getting reimbursement. It is a Law Library rule that expense reimbursements must be given to Admin within 30 days of the completion of the event. Late requests for reimbursement will not be paid.
**STEP 5: March review and adjustments:** The Director and Department Heads will review expenses in March, and consider any adjustments needed to meet Library needs. Staff members, committee chairs, or department heads who want to request additional funding during the year may do so by submitting the form to the March meeting. The Director and Department Heads will decide as quickly as possible, based on expenditures to date in the staff education budget, and the entire Library operating budget.